



Rogue Workforce Partnership Workforce Investment Board Meeting

Pacific Retirement Services • Third Floor, Washington Room • 1 W. Main St., Medford
May 11, 2015 • 7:30 - 9:30 a.m.

Video/Phone Conference access: <https://global.gotomeeting.com/join/733398357>. Please activate (share) your webcam & select your audio preference. **1) Telephone (1-408-650-3131; access code: 733-398-357** (long distance charges will apply); **2) or, use computer microphone & speakers** (headset is required, or use mute to avoid reverb).

Agenda

- 1. Welcome & Introductions** (3m) Jessica Gomez
- 2. Consent Agenda - Action Item** (2m) Jessica
 - Approval of Minutes - March 9, 2015 📄
- 3. Strategic Plan Implementation & Workforce / Education System Transformation**
 - Sector Strategies** (5-10m)
 - **Engineering Job Seekers Cohort / Employer Networking** Jim/Rob Hegeman
 - Systems Innovation**
 - **Southern Oregon Success - *Organizing Proposal* (Youth)** 📄 (15m) Jim
- 4. Guide, Inform & Lead Strategic Partnerships**
 - National Coordination**
 - **U.S. Department of Labor** 📄 (5m) Jim Fong
Selected Fact Sheets & Draft WIOA Regulations - <http://www.doleta.gov/wioa/>
 - State Coordination**
 - **Governor's Workforce Policy Advisor** 📄 (30m) Elana Pirtle-Guiney
Discussion of State's Workforce Issues & Priorities / Local Workforce Board Coordination
 - **Local Board Chartering Checklist** 📄 (5-10m) Jim
 - **Oregon Workforce Partnership - *Video on Role of Workforce Board*** (3m) Jim
<http://www.oregonwfpartnership.org/>
 - Regional Coordination**
 - **Service Provider for WorkSource Oregon Centers** (30-45m) Jim, Jessica
Affirming Selection of WIOA & DHS Service Provider - **Action Item** 📄
 - **New Intergovernmental Government Agreement** (1m) Jim
Rogue Valley Workforce Consortium – Jackson & Josephine Counties
 - **New Workforce Development Board Configuration** 📄 (15-20m) Jim, Jessica

5. Other Business

Jessica

6. Adjourn

Jessica

Auxiliary aids and services are available upon request to individuals with disabilities. Please contact Tami Allison at (541) 776-5100 (Voice/TDD) at least 48 hours in advance of meeting to allow sufficient time to arrange for auxiliary aid.



ROGUE WORKFORCE PARTNERSHIP

MINUTES

ROGUE WORKFORCE PARTNERSHIP

March 9, 2015

Pacific Retirement Services - Third Floor, Washington Room
1 W. Main St., Medford, OR

MEMBERS PRESENT:

Wes Brain, Michael Donnelly, Jim Fong, Ron Fox, Jessica Gomez, John Higgins*, Pete Karpa, Brent Kell*, Michael Kidwell, Tolga Latif*, Doug Mares, Tamara Nordin, Teresa Sayre, Lyndell Smith,

*= via phone

QUORUM PRESENT: Yes

OTHERS ATTENDING:

Oregon Employment Department: Sherri Stratton, Guy Tauer, Tamara Schroeder

Department of Human Services: Melissa Wolff

Southern Oregon University: Sue Walsh, Provost

(pending appointment)

Southern Oregon ESD: Gwyn Lema

College Dreams: Stacie Grier

Southern Oregon Goodwill Industries: Shae Johns, Matt Chesler

Rogue Community College: Genna Southworth, Brandon Bretl

Easter Seals: Linda Chase

Junior Achievement: Deanna Wilson

BBSI: Suz Montemayor, Joe Rossi

The Job Council: Aurora King, Graham Hetland, Rene' Brandon, Sherri Emitte, Kristen Anderson, Ken Heindsmann, Tami Allison

All meetings of the Rogue Workforce Partnership are recorded should reference be desired in addition to the minutes.

1) CALL TO ORDER, WELCOME & INTRODUCTIONS:

The RWP meeting was called to order by Chair Jessica Gomez at 7:39 am. Introductions were made.

2) CONSENT AGENDA:

TAMARA NORDIN MOVED TO APPROVE THE CONSENT AGENDA AS PRESENTED. THE MOTION WAS SECONDED BY MICHAEL DONNELLY AND WAS UNANIMOUSLY APPROVED.

3) GUIDE, INFORM & LEAD STRATEGIC PARTNERSHIPS

National Coordination

- **WIOA Implementation** – Today's packet contains a handout "National Framework – Side-by-side Comparison of WIA- WIOA" that should be helpful in answering some questions on the differences between the two laws.

Pete added that from a VR perspective, it has caused change in the way that they do business by expanding the current services. “A goal of the WHESP (the RWP’s Workforce & Higher Education System Partners Sub-Committee) group is how to align the services”, Pete stated. VR has been operating retroactive back to the July 1, 2014 date that the law passed.

- **U.S. Department of Labor Guidance Letter** – TEGL 19-14 “Vision for the Workforce System and Initial Implementation of the Workforce Innovation and Opportunity Act of 2014” is also available in today’s packet for reference.

Regional Coordination

- **Governance Update** – Jim presented the Daily Courier article about The Job Council and indicated about 90% of the article was accurate. The group was also updated on the transition and that we are continuing to move forward aggressively to have a new service provider in place by July 1, 2015.

Sherri E. reported that new GASB rules state that as of June 30, 2015, pension liability must appear on an organization’s balance sheet. The oddity, however, is that the regular unfunded liability has to appear; however, the larger transitional liability does not. Jim and Sherri notified PERS last week, by phone that TJC would be dissolving as of June 30, 2015. TJC has been asked to forward information to PERS which will be done in the very near future. PERS will be assessing options and determining their next steps in response to The Job Councils’ dissolution.

- **Procurement for WorkSource Oregon Center** – WIOA & DHS Service Provider -The joint procurement document (RFP 3974) is in review with DAS and DOJ, and will be published as soon as it is approved. The response and review time will be shortened to meet the time constraints due to the late publishing of the RFP.
- **Using The Job Council Brand Name** – RWP members were in agreement that the Job Council name should be preserved. ***RON FOX MOVED TO PROCEED WITH PRESERVING THE JOB COUNCIL NAME AS LONG AS IT MAKES DENSE. THE MOTION WAS SECONDED BY DOUG MARES AND WAS APPROVED UNANIMOUSLY.***
- **New RWP Website & Logo** – Graham reported that we have started using a new logo that was voted on by about 6 WIB members even though there have been some suggestions about the font. Graham will explore some different font options and will email out to the group for additional comments.

A skeleton of the new RWP website is running to host the RFP. Graham reviewed the website, and the RWP Facebook page with the group. Several suggestions were made for revisions:

- Discuss with SOREDI, SVTG, and Medford Chamber to see how best to link to business
- Have a page for each sector and link out to other sites
- Be clear about who the audience is – more links, less content
- Fonts should be bold in order to stand out better
- Need a way to track the traffic to the site, where they go, and how long they stay

4) STRATEGIC PLAN IMPLEMENTATION & WORKFORCE/EDUCATION SYSTEM TRANSFORMATION

Sector Strategies

- **Advanced Manufacturing & E-Commerce/Info Tech** - Convened a work group in December where national consultants attended and helped in walking through data from various sectors. Group came together and will be launching some events to bring companies together to go through a process of modest surveying and skill/asset mapping. A second meeting is scheduled for March 18, 2015. It was suggested that a social event or some kind of common event could attract businesses to attend. Also suggested was having a one page document (similar to the healthcare page) showing career access, as well as de-segmenting and splitting out by specialty.
- **Healthcare** -Great conversation took place at the last steering committee meeting where we debriefed the January Legislative event. The group is excited to begin mapping out career pathways within the healthcare industry.

Southern Oregon Success

- **Governance and Organizational Update** – Jim reported that we are attempting to create a more coordinated oversight including College & Careers for All, etc. A governance proposal will be taken to Jefferson Regional Health Alliance, the Early Learning group, and brought back here to the next meeting. Jim indicated that we are leading the state in the work we are doing in this area.
- **Careers In Gear** – Stacie reported that Careers in Gear will be held this Thursday March 12, 2015. 822 students are officially pre-registered and there are more business people than ever before. Discussion took place around the need to get more educators exposed and it was indicated that schools have been encouraged to select teachers and counselors to be involved in the event. Stacie encouraged RWP members to attend, and a video that will be shown in the exhibit hall was shown to the members at the close of the meeting.

5) OTHER BUSINESS

No other business was brought before the Rogue Workforce Partnership.

6) ADJOURN

With no further discussion, the meeting was adjourned at 9:36 am.

Respectfully Submitted,

Tami Allison
Executive Team Coordinator

/tka
APPROVED:

Chair

Date

Southern Oregon Success ♦ Organizing Proposal

About Us

Southern Oregon Success (SORS) is about improving the lives of the children, youth, and families. Focused on children and youth from prenatal to age 24 in Jackson and Josephine Counties, we're a growing network of K-12 school districts, higher education, non-profit organizations, government agencies, health care organizations, community groups, workforce/economic development partners and business leaders. We're committed to taking action and making a difference.

A Call to Action

Oregon has many negative life outcomes for children, youth and families. And, the Rogue Valley ranks high in the state in many of these outcomes.

- Oregon has the lowest High School Graduation Rate in the nation, and Southern Oregon is among the lowest in the state (67.4%)
- Among the highest rate of Substance Abuse for Adolescents in the nation
- High Youth Suicide rate
- High Youth Homelessness rate (10%)
- High Child Poverty rate

This is a clarion call to action and a compelling case for profound change. These negative outcomes have manifested as a result of a wide array of long-developing economic, technological, global and social trends – many of the driving forces of which we have little or no direct control over at our regional level. However, we are able to focus on what we can do locally to make a difference.

As we see it, a significant problem that we can fix is in the mostly disparate, isolated and uncoordinated efforts underway trying to improve these outcomes. The problem is that many different entities are working in relative degrees of isolation, and therefore getting in-the-way or duplicating each other's efforts.

Southern Oregon Success seeks to solve this problem. We're creating greater collaboration, coordination and partnership. We're establishing a governance framework, appropriate forums, clear roles and responsibilities, and solid communication and decision-making protocols. This is about a fundamental shift in our mindset. It's about listening differently, thinking differently, and taking action differently.

We seek to build a bridge from our current reality to the future - from isolated to integrated and collaborative; from independent to inter-dependent. Through a Collective Impact approach, we believe we can, as a dynamic learning community, take more effective action together and significantly improve the life and success outcomes for all children, youth and families in Southern Oregon.

Our History

Southern Oregon Success began in January 2012, initiated through the catalytic leadership of the:

- Jackson County Commission on Children and Families
- Josephine County Commission on Children and Families
- Southern Oregon Education Service District
- Rogue Workforce Partnership
- Gordon Elwood Foundation

These organizational leaders seized upon the opportunity to convene a wide range of partners to focus on improving outcomes for children and youth along the entire continuum from prenatal to career. While the Governor and the State Legislature were initiating multiple statewide system transformation initiatives in education healthcare, social services and workforce, our partners were working to continuously to improve collaborative efforts, leverage resources and align these complex systems.

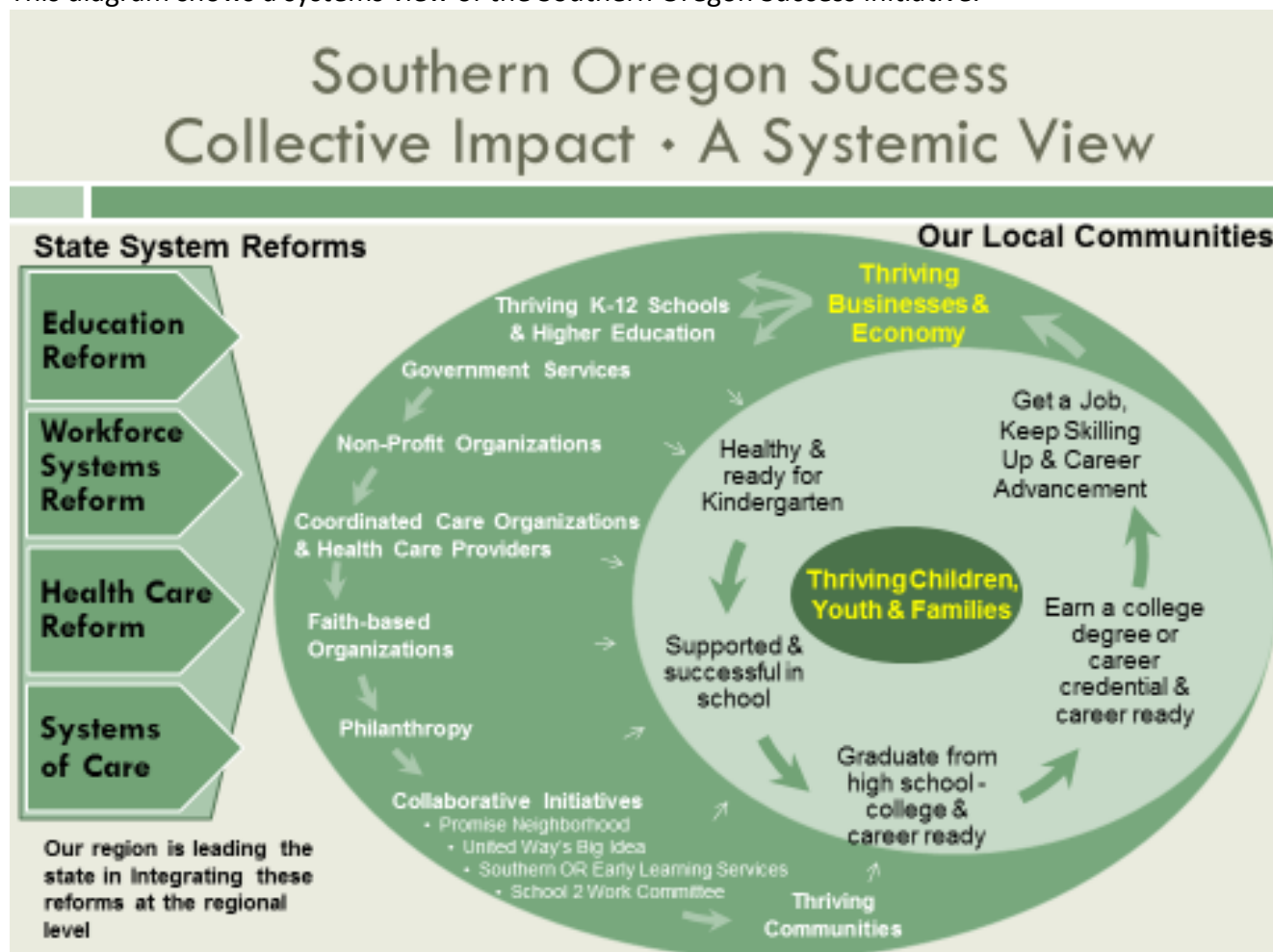
The founding SORS Steering Committee participants embraced the Collective Impact organizing model¹ and met monthly to outline the mission and vision, values and general guiding principles for a regional collaborative. Sub committees were created and became very active around specific age related issues/opportunities and have continued throughout the last three years with growing cross-sector participation. The catalytic leadership provided the “back bone support” as a Process Planning team with very limited contract project management staffing supported by financial and in-kind resources from the Elwood Foundation, Oregon Community Foundation and Oregon Education Investment Board, which were channeled through the Rogue Workforce Partnership and the Southern Oregon Education Services District. Consultant project support assisted in coordinating the Monthly Steering Committee meetings, agendas, minutes and follow-up. Process Planning team members committed significant in-kind support and helped secure financial resources to help develop Continuous Communications and further develop the Metrics and Governance structure among the participating organizations and systems.

In 2014, a Governance Committee² was initiated among those interested formalizing an operational structure that would support the regional work. As a result of numerous activities promoted through the Oregon Investment Board’s Regional Achievement Collaborative and the Governor’s Oregon Solutions board, SORS was able to leverage financial support to assist in the creation of regional metrics and governance for the initiative. It was apparent that in our region there was an opportunity to bring health care transformation together with the SORS and Early Learning Hub initiatives because of the greater understanding of the Social Determinants of Health.

¹ http://www.ssireview.org/articles/entry/collective_impact

²The Governance Committee Members are Kathy Bryon, Gordon Elwood Foundation, Amy Buehler, Jackson County Mental Health, Mary Ferrell, Maslow Project, Jim Fong, Rogue Workforce Partnership, Mary-Curtis Gramley, Southern Oregon Early Learning Hub, Bob Lieberman, Kairos, and Scott Perry, Southern Oregon Education Services District.

This diagram shows a systems view of the Southern Oregon Success initiative.



Our Shared Vision & Common Purpose

Our work is rooted in the recognition of the complexity of the issues that the children, youth and families in our community face - low rates of academic success, high rates of substance abuse, generational poverty and mental and physical health issues.

These are significant social issues that cannot be solved by the individual government systems and programs created to try and address these concerns. Southern Oregon Success is rooted in the recognition that we, as a community, need to think together and act differently to positively impact these current realities.

Our mission: We weave together the talent, expertise and resources of the entire community to promote the well-being, academic and life success of our children, youth and families.

Our vision: We envision flourishing children, youth and families prenatal through age 24 in Jackson and Josephine Counties:

- All families receive support to nurture their children
- All children are ready for kindergarten
- All youth succeed in school and life
- All children, youth and families live in a thriving economy

Our belief is that this work is so important that this transcends any particular funding supports, programs or initiatives. This is about creating cultural change in our community that will persist over time, regardless of changes in state or federal policy, funding or initiatives. We are seeking to fundamentally change the way we think and act - as individuals and as a community. We want to take more effective action in creating the outcomes we want for our children, youth, families, community and regional economy.

Our Practices

Our goal is to develop common practices that are grounded in the latest research and that are relational and trauma-informed. This will involve being informed by the research in the neurosciences and learning, and from our work together. We believe that developing practice models within this framework will enable us to effectively engage and respond to each individual child, youth, young adult or family member.

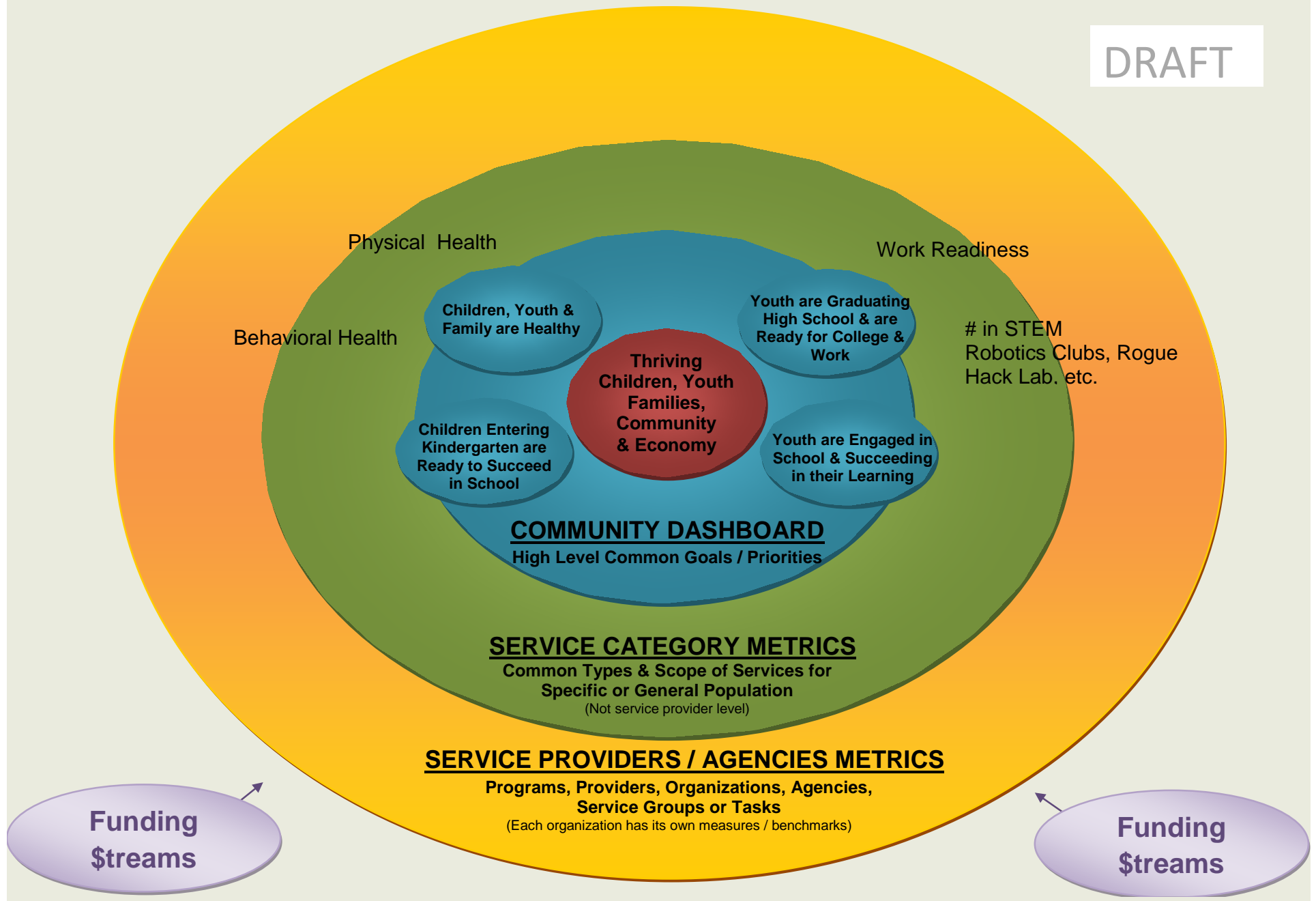
We envision that implementing best and evidence-based practices with empathy and kindness as abiding characteristics will fundamentally change how we think and act in our day-to-day work. We will better be able to align our work across organizations and initiatives and foster a broader awareness in the public about the importance of our efforts. Using aligned practices and a common language to focus on individual and family needs and strengths will better enable us to respond to children, youth, and families across systems and the traditional “silos” in ways that facilitate change.

Community Dashboard & Performance Metrics

Key in the design of Southern Oregon Success is to measure our achievement of this practice vision. The following diagram and table depicts a proposed Community Dashboard and Performance Metrics for SORS. These key dashboard indicators would give a high-level view of the overall direction of our community trends. They would be surrounded by more specific, more granular metrics at the service category or individual agency level.

Southern Oregon Success ♦ Community Relationships / Performance Metrics Map

DRAFT



Community Dashboard & High Level Performance Metrics

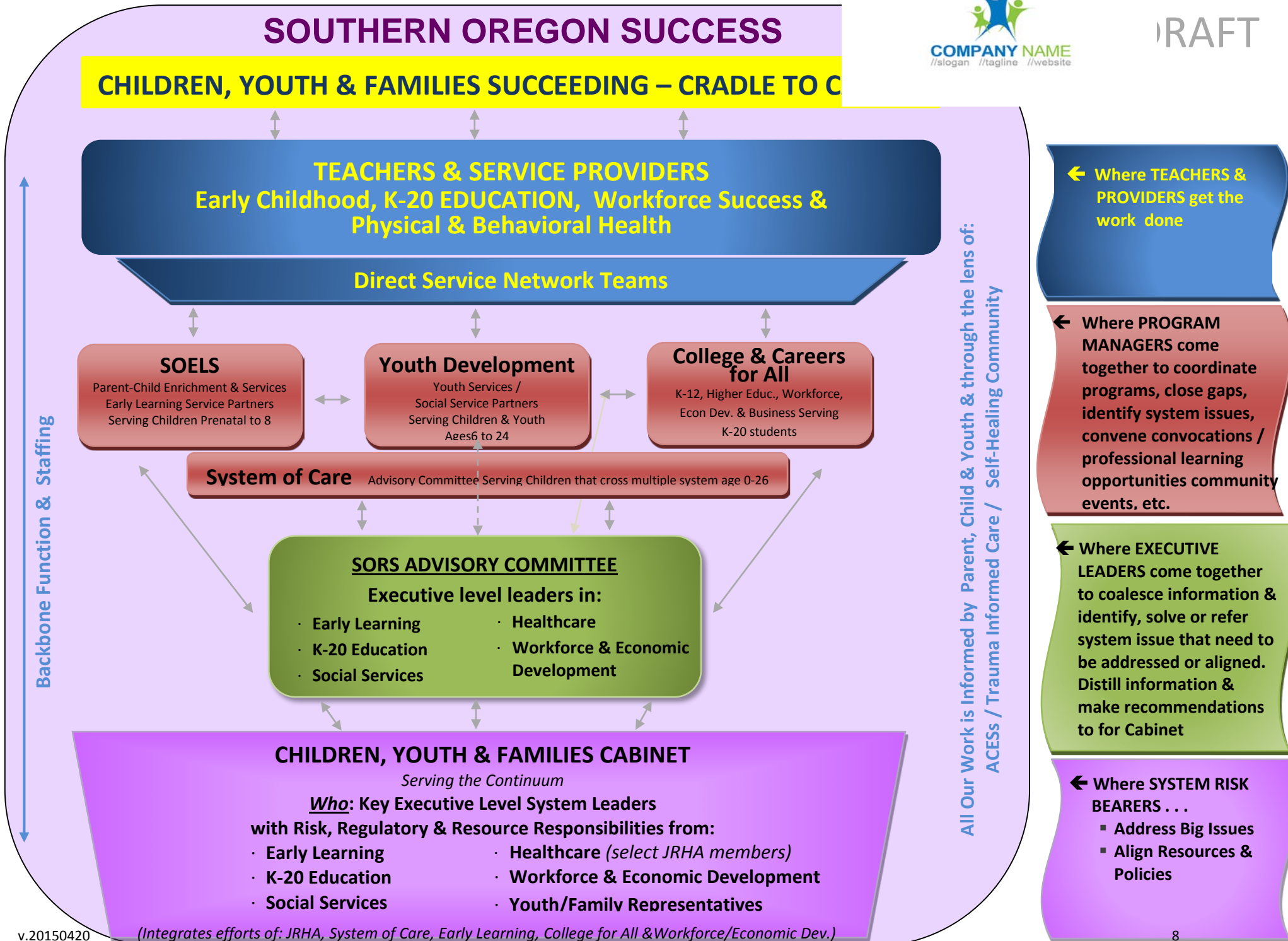
Children Entering Kindergarten are Ready to Succeed in School	Youth are Engaged in School and Succeeding in their Learning	Youth are Graduating High School and are Ready for College & Work
<ul style="list-style-type: none"> Performance on Kindergarten Assessment Number of children receiving Developmental Screening prior to age 3 Number of 0-5 year old children with access to PCPCH -Patient Center Primary Care Home <p>Target population: 16,000 children with high risk / poverty factors</p>	<ul style="list-style-type: none"> 3rd Grade Reading: 69.1%* 8th Grade Math: 57.8%* 9th Grade Student Attendance: 78.2%* (not chronically absent) <p>*= All students 2013-2014, currently includes Klamath Co.)</p>	<ul style="list-style-type: none"> Graduation Rate: 67.4%* Number of college level course in HS: goal is 3+ (baseline TBD data currently unavailable from ODE) National Career Readiness Certificate: 613 (as of 3/1/14) 1st Year College Enrollment : 53%* 2nd year college persistence: 41%* approximately <p>*= (2008-2009 cohort of 9th graders, data currently includes Klamath Co)</p>
←Children, Youth & Family are Healthy→		
<div> <ul style="list-style-type: none"> Youth Mental Health <ul style="list-style-type: none"> Youth Drug & Alcohol Rates (8th grade binge drinking/ marijuana usage in last 30 days 25% in both counties)* Teen Pregnancy Rate (Jx Co 37 births/1000 teens, Jo Co 36/1000)* Teen Suicide Rate (8% of youth in both counties attempt suicide)* <p>*Community Health Assessment 2013</p> </div> <div> <ul style="list-style-type: none"> Access to Health Care <ul style="list-style-type: none"> Patient Center Primary Care Home (% of all youth assigned to a PCPCH) Access to oral health care (% of untreated decay in children grades 1-3 in the region 24%)* % of youth receiving annual well health exams </div>		
Children's First Ranking – Jackson County ranks 33 out of 36 counties for number of homeless youth, Josephine ranks 27 out of 36 (with 36th being the highest number of homeless youth)		
<ul style="list-style-type: none"> Child Poverty Jackson Co. 2013 11,603(Count) 26.7% Josephine 2013 4,806(Count) 30.7% 		

Proposed Governance Structure

Diagram A on the following page shows a proposed governance structure for Southern Oregon Success. This diagram is not intended to describe a hierarchy or a structure of control. Instead it describes a system which allows each individual stakeholder to interact at the level which is most relevant to him or her. Service providers interact with other service providers, program managers brainstorm together, and policy makers discuss systems change. All services described in this diagram are offered within the age 0-24 continuum and are focused on children, youth and families. *Appendix A describes the proposed functions, make up and by-laws in which this Southern Oregon Success would operate.*

Grants/Funding Coordination & Strategy

Coordination for Southern Oregon Success will be the ultimate responsibility of the Governing Cabinet. Decisions on grant applications for collaborative work or back bone funding will also be made by the Governing Cabinet. Programmatic grant applications will be worked on and recommended by either working committees, the steering committee or other advisory groups to be created as needed. Until the Governing Cabinet is established, the Governance/Process Planning committee of the Southern Oregon Success Steering Committee will make these decisions.



Appendix A

Partnership Agreements / Operating Guideline / Bylaws / Declaration of Cooperation

Southern Oregon Success (SORS) is a growing network of non-profits, schools, state agencies, health care organizations and community groups serving children, youth and families, to ensure success throughout the prenatal to age 24 continuum in Jackson and Josephine Counties.

SOUTHERN OREGON SUCCESS

Partnership Agreement

This document comprises an agreement through which many and diverse partners in Jackson and Josephine County will work together in a collective impact effort to establish long term, enduring, and trauma informed collaboration on behalf of children and families of the community. This agreement builds on several years of conversation and dialog and the efforts heretofore to establish collective impact efforts through the Southern Oregon Success Initiative.

The agreement identifies the mission, vision, goals, and key concepts as well as a governance and collaboration structure with delineated responsibilities and authorities.

I. Mission and Vision

Our mission: We weave together the talent, expertise and resources of the entire community to promote the well-being, academic and life success of our children, youth and families.

Our vision: We envision flourishing children, youth and families prenatal through age 24 in Jackson and Josephine Counties:

- All families receive support to nurture their children
- All children are ready for kindergarten
- All youth succeed in school and life
- All children, youth and families live in a thriving economy

II. Key Systemic Principles and Practices

- A. System partners will function as a learning collaborative, helping one another understand and implement research informed, evidence based practices.

- B. System partners will embrace cultural and linguistic diversity in its composition, governance structures, and practices.
- C. Active youth and family participation and voice throughout all components of the system and levels of the operating structure is an essential precondition.
- D. The collective impact framework will embrace practices and principles informed by the Adverse Childhood Experiences Study.
- E. System partners will become familiar with trauma informed practices and pursue opportunities to implement these in their respective individual organizations. System performance will be measured by metrics agreed upon by the partnership based on system level measures required by state and regulatory entities, building on the initial matrix that has been established through the SORS process.
- F. The common metrics will be utilized to help efforts in the community on behalf of young people and families point in the same direction and to identify gaps and issues which can be addressed at various levels of the collective impact structure.
- G. Public awareness regarding the impact of adverse childhood experiences is a critical aspect of generating collective impact; efforts to promote person to person engagement and understanding will be identified and implemented.
- H. Operationalizing collective impact while meeting the requirements of the various mandates and funding streams will require regular dialogue and partnership.
- I. Coordinating screening and measurement tools and facilitating universal understanding of how to access and utilize these tools is a critical functional aspect of the work.
- J. Ensuring all mandated and existing “systems” are participants to the process is essential. Promoting person to person, family to family, community member to community member awareness and understanding of the critical importance of preventing adverse experiences provides the context for the collective impact efforts.

III. Operating Structure – The Southern Oregon Success Collective Impact Effort is structured with differing levels of function, responsibilities, and authorities, organized in this document from the child and family level through the top leadership level.

- A. Children, youth, and families.
 - 1. System efforts will focus on trauma informed supports and responses for children, youth, and families, those being served as well as the broader community population.
 - 2. The voice of children, youth, and families will be actively solicited at all levels of the system, through participation in system level groups as well as in provider level activities. System operations will be characterized by partnership between individuals served and the professionals. Children and families will be included in their own planning meetings unless in the presence of specifically identified contraindications.
- B. Direct Service/Instruction/Support/Contact Level
 - 1. This describes the level at which the large majority of the work with young people and families occurs. This is where individuals working or volunteering for affiliates in the system provide early learning, instruction, work force support, treatment and other direct services and supports for young people and their families. This level also encompasses wellness and resiliency services and supports and person to person connections. The entities at this level are the schools, social service agencies, health and treatment programs, providers and practitioners.

2. Responsibilities and Authorities:

- a. The entities at this level provide direct instruction, services, and supports within the framework of the function of the affiliate (e.g. preschool, school, treatment, social service, workforce preparation, etc.) to children, youth, and families based on the professional training of the individual, utilizing best, research informed, evidence based, and trauma informed practice.
- b. Individuals at this level will include early childhood workers, teachers, skills trainers, therapists, peer and family support, advocates, and social service specialists, each of whom perform responsibilities based on their job description and role in direct instruction and service delivery.
- c. These individuals will perform functions and attend meetings directly related to planning for and providing the actual service to children, youth, and families.
- d. This level is where the direct line worker is getting the work done with commensurate responsibilities and authorities.

C. High Level Staffing/Direct Service Network Teams

1. This level of the system addresses the situations in which there is a child/youth whose needs are not being met at the direct service level due to level of need complications or system barriers.
2. These groups will convene as required for individual children and families and can be called by a member of the entity providing the instruction or service or by members of individual planning teams.
3. It is at this level of care specific client issues addressing barriers to services and supports are addressed, as well as structural issues that are affecting more than a small number of individual youth and families.
4. This level involves pulling in the youth and family and other system partners to encompass different perspectives about how to meet the needs of the child and family.
5. Responsibilities and Authorities:
 - a. This is a coordinated effort level of the system.
 - b. It is where direct service workers as well as supervisors, managers, youth and families come together to coordinate programs, close gaps, and identify system issues that are impeding the efforts for a specific child and family.
 - c. Issues requiring a higher scope of responsibility and authority than those present on the teams are referred to the appropriate Coordinating Council.
6. High level staffing/direct service network teams will ensure youth and family voice in the conversation and will seek to identify patterns and gaps for individual youth and families that reflect broader issues in the system.

D. Work Groups

1. Work Groups are entities established as a result of statute, rule, or other regulatory requirement to coordinate efforts in specific systems. Examples include but are not limited to:
 - a. Youth Development.
 - b. System of Care.
 - c. School to Work.
 - d. Early Learning.

2. These groups will meet on a regular basis as established by requirement and or the group.
3. Composition – These groups are where supervisors, managers, youth and families come together to coordinate programs, close gaps, and identify system issues.
4. Responsibilities and Authorities:
 - a. Perform all responsibilities and authorities required by statute, rule, or other regulatory framework.
 - b. Work to facilitate cross system coordination with other similar Coordinating Council entities and efforts.
 - c. Identify issues beyond the scope of the membership of these councils for referral to the SORS Advisory Committee.

E. SORS Advisory Committee

1. This group is composed of organization/agency risk bearers, including CEOs and Executive Directors of service provider agencies, K-20 school leaders, work force and economic development system/funding leaders and youth and families served.
2. This group will meet every other month or six times a year.
3. The SORS Advisory Committee will have the following roles and responsibilities.
 - a. Monitor and review metrics on community dashboards, making recommendations to the appropriate level or system entities based on the data.
 - b. Coordinate community efforts to serve children, youth, and families.
 - c. Provide essential clearing house for collaborative, regional grants.
 - d. Ensure cohesion of collaborative grant making efforts.
 - e. Identify and prioritize child and family needs in the service/support continuum.
 - f. Cross system problem solving.
 - g. Provide an information sharing form.
 - h. Community mapping.
 - i. Research and report on best practices, identifying opportunities for change.
 - j. Provide opportunities for ongoing learning.
 - k. Provide report-outs from the Coordinating Councils regarding their activities
 - l. Receive and respond to ad hoc report outs regarding other community endeavors.
 - m. Refer issues and recommendations that are beyond the scope and responsibility of the Advisory Committee and the individual members of the Advisory Committee to the children, youth, and family cabinet.
4. The Advisory Committee will elect a chair and vice chair, and other officers as it deems fit.
5. The Advisory Committee will have one vote per organization assigned to the director or single designee.
6. The committee will establish a set agenda that will include:
 - a. Report outs from each of the main standing collaborative committees from the community coordination level of the system
 - b. Time for open discussion.
 - c. Grant opportunities and reports.

d. Agenda setting for next time.

7. The agenda will be set by the chair and vice chair, with any member of the committee able to request an item be placed on the agenda.
8. The Advisory Committee will invite and embrace other community collaborations, both through attendance at its meetings and efforts to establish integrated linkages.
9. The Advisory Committee will plan and arrange for larger community convocations, gatherings, or networking opportunities.

F. Children, Youth, and Family Cabinet

1. The Children, Youth, and Family Cabinet will consist of administrators and heads of community entities that bear regulatory, policy, and resource risk and responsibilities for the operation of the collective system.
2. The cabinet will encompass the functions of leadership groups existing leadership groups with overlapping composition as mutually agreed upon. These would include but not be limited to:
 - a. The Jefferson Regional Health Alliance.
 - b. Rogue Workforce Partnership.
 - c. Southern Oregon Early Learning System Executive Committee.
 - d. System of Care Governance Committees.
3. The cabinet will meet three times a year.
4. The cabinet will have a set agenda that includes a report out from each of the other executive level groups represented, input information from the SORS Advisory Committee, time for public discussion.
5. Responsibilities and Authorities:
 - a. Take action to promote system alignment.
 - b. Take collaborative action to move barriers to supports and services for youth people and families.
 - c. Learn about and oversee the development of trauma informed practices in the collective impact system and individual agencies.
 - d. Align community priorities, investment strategies, and funding.
 - e. Map funding streams to identify who can assume responsibility for key objectives with available dollars.
 - f. Provide a united front for southern Oregon for legislative and state and federal advocacy.
 - g. Respond to emergent situations that are beyond the scope of other levels of the system.
 - h. Endorse documents, MOUs, and community collaborations that are in keeping with the vision of the collective impact system.
 - i. Oversee the community dashboard, providing guidance, direction, questions, and evaluation of the whole system.
 - j. Guide and oversee the overall collaborative impact efforts.
 - k. Take action that is empowering to the direct service continuum for effective service delivery.

6. Cabinet meetings will be considered public meetings and will operate according to procedures developed by the cabinet.
 - a. The Cabinet will annually elect a chair and a vice chair.
 - b. The chair and vice chair on the Advisory Committee will participate in Cabinet meetings.
 - c. Time for community input will be allowed.
 - d. Cabinet composition will include youth and families served.
 - e. The Cabinet will consider identifying a core team and a broader team in dialogue with the other high level groups encompassed in its composition.
 - f. The Cabinet team will have staff support from appropriate staff from cabinet member organizations and or staff assigned to the SORS Collective Impact effort.

IV. Metrics/Community Dashboard

- A. The SORS Advisory Committee will appoint a subcommittee to design, create, monitor, and revise as necessary a dashboard of cross cutting metrics that measure system performance in areas that are mandated by statute or regulation as well as for indicators identified as local priorities.
- B. The workgroup will endeavor to create measures that are able to be readily implemented by provider organizations that build upon current measurement efforts in the community.
- C. These measures will be displayed on a matrix and be able to be relegated on an ongoing basis to a community dashboard.
- D. System performance as evaluated by the metrics will be reviewed by the SORS Advisory Committee in detail and reviewed and overseen by the Children, Youth, and Family Cabinet.

V. Amendment

- A. This agreement can be amended by action of the Children, Youth, and Family Cabinet, with a minimum of thirty days' notice to members.

Appendix B

Case Studies / Example

Maslow Project Case Study Example:

Lindsay, age 16, lived in shelters, cars, the floor or couch of others' houses, or on the street - with other youth in a similar situation - for the majority of her childhood. Lindsay is outside of the formal "system" and prefers it this way. She was diagnosed with a learning disability when she was eight, attended seven different schools, and has an ACEs score of seven. To numb feelings of depression and anxiety related to the trauma she experiences, Lindsay drinks alcohol and uses hard drugs on a regular basis. She hangs out with other drug users, is severely credit deficient, at-risk for teen pregnancy and STDs, domestic violence/abuse, and dropping out of high school, and incarceration (to name a few).

How are we collectively going to support Lindsay?

Direct service providers would start by stabilizing this youth: provide basic needs resources and services, assess for risk and strengths, create a goal plan, and begin case management. Maslow Case Managers convene the other direct service providers involved in "wraparound" support such as: school counselor (including Special Ed. department), HWAM, On-Track, Goodwill, Community Health Center or La Clinica, JCMH, etc. Case Managers/providers discuss how to best support this youth and create a service plan or identify next steps.

What happens if there are differences in agency philosophies? For example, barriers to receiving immediate family planning & pregnancy testing, or differing opinions between case managers working with Lindsay in residential versus outpatient treatment settings? We would need to utilize an established forum for program managers, supervisors, youth, and families to coordinate programs, close gaps, identify system issues. This doesn't currently formally exist and most of these types of discussion happen organically person-to-person, if at all.

What happens if there are system barriers that are creating problems? If it had been identified that Lindsey was in need of residential drug treatment, that service doesn't exist in Southern Oregon, making it difficult for local providers to facilitate needed care. This type of system gap (or barrier) ideally be referred to a children, youth, and families cabinet of executive-level decision makers/leaders who would address these larger system issues in effort to align resources and policies, or fill gaps in services offered in the community.

The Workforce Innovation and Opportunity Act - July 22, 2014

The Workforce Innovation and Opportunity Act (WIOA) will help job seekers and workers access employment, education, training, and support services to succeed in the labor market and match employers with skilled workers they need to compete in the global economy. Congress passed WIOA, the first legislative reform of the public workforce system in more than 15 years, by a wide bipartisan majority. In doing so, Congress reaffirmed the role of the American Job Center (AJC) system, a cornerstone of the public workforce investment system, and brought together and enhanced several key employment, education, and training programs. In recent years over 20 million people annually turn to these programs to obtain good jobs and a pathway to the middle class. WIOA continues to advance services to these job seekers and employers.

HIGHLIGHTS OF WIOA REFORMS TO THE PUBLIC WORKFORCE SYSTEM

Aligns Federal Investments to Support Job Seekers and

Employers: At the State level, WIOA establishes unified strategic planning across “core” programs, which include Title I Adult, Dislocated Worker and Youth programs; Adult Education and Literacy programs; the Wagner-Peyser Employment Service; and Title I of the Rehabilitation Act programs.

Strengthens the Governing Bodies that Establish State, Regional and Local Workforce Investment Priorities: WIOA streamlines membership of business-led, state and local workforce development boards. The Act emphasizes the role of boards in coordinating and aligning workforce programs and adds functions to develop strategies to meet worker and employer needs.

Helps Employers Find Workers with the Necessary Skills: WIOA emphasizes engaging employers across the workforce system to align training with needed skills and match employers with qualified workers. The Act adds flexibility at the local level to provide incumbent worker training and transitional jobs as allowable activities and promotes work-based training, for example by increasing on-the-job training reimbursement rates to 75 percent. The law also emphasizes training that leads to industry-recognized post-secondary credentials.

Aligns Goals and Increases Accountability and Information for Job Seekers and the Public: WIOA aligns the performance indicators for core programs, and adds new ones related to services to employers and postsecondary credential attainment. Performance goals must reflect economic conditions and participant characteristics. It makes available data on training providers’ performance outcomes and requires third party evaluations of programs.

WIOA PROGRAMS

WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.

WIOA authorizes the Job Corps, YouthBuild, Indian and Native Americans, and Migrant and Seasonal Farmworker programs, in addition to the core programs.

EFFECTIVE DATES FOR IMPLEMENTATION

President Barack Obama signed WIOA into law on July 22, 2014.

In general, the Act takes effect on July 1, 2015, the first full program year after enactment, unless otherwise noted. The State Unified Plans and Common Performance Accountability provisions take effect July 1, 2016. The U.S. Department of Labor (DOL) will issue further guidance on the timeframes for implementation of these changes.

DOL will issue proposed regulations reflecting the changes in WIOA soon after enactment.



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Fosters Regional Collaboration to Meet the Needs of Regional Economies: WIOA requires states to identify economic regions within their state, and local areas are to coordinate planning and service delivery on a regional basis.

Targets Workforce Services to Better Serve Job Seekers: WIOA promotes the use of career pathways and sector partnerships to increase employment in in-demand industries and occupations. To help local economies target the needs of job seekers, WIOA allows 100 percent funds transfer between the Adult and Dislocated Worker programs. WIOA adds basic skills deficient as a priority category for Adult services. WIOA also focuses Youth program services to out-of-school youth. The Act strengthens services for unemployment insurance claimants. It also merges WIA core and intensive services into a new category of career services, clarifying there is no required sequence of services. The Act allows Governors to reserve up to 15 percent of formula funds for activities such as innovative programs.

Improves Services to Individuals with Disabilities: WIOA increases individuals with disabilities' access to high-quality workforce services to prepare them for competitive integrated employment. It requires better employer engagement and promotes physical and programmatic accessibility to employment and training services for individuals with disabilities. Youth with disabilities receive extensive pre-employment transition services to obtain and retain competitive integrated employment. It creates an Advisory Committee on strategies to increase competitive integrated employment for individuals with disabilities.

Supports Access to Services: To make services easier to access, the WIOA requires co-location of the Wagner-Peyser Employment Service in AJCs and adds the Temporary Assistance for Needy Families program as a mandatory partner. WIOA establishes dedicated funding from AJC partner programs to support the costs of infrastructure and other shared costs that support access to services. It asks the Secretary of Labor to establish a common identifier for the workforce system to help workers and employers find available services. In addition, WIOA allows local areas to award pay for performance contracts so providers of services get paid for results. It also allows direct contracts to higher education institutions to provide training.

STAKEHOLDER ENGAGEMENT AND TECHNICAL ASSISTANCE

DOL, in coordination with the U.S. Departments of Education (ED) and Health and Human Services (HHS), is working diligently to ensure that states and local areas, other grantees, and stakeholders are prepared for implementation of WIOA. DOL will provide technical assistance, tools, and resources to States and local areas through the WIOA Resource Page (www.doleta.gov/WIOA), Webinars, and virtual and in-person discussions.

DOL will actively engage stakeholders in the implementation of WIOA. Opportunities to provide input will be communicated through the WIOA Resource Page.

WIOA RESOURCE PAGE

Visit www.doleta.gov/WIOA to learn more and access relevant guidance and technical assistance tools and resources developed by the Employment and Training Administration (ETA). All relevant guidance will also be posted on the ETA Advisory Website (<http://wdr.doleta.gov/directives/>) Please email questions to DOL.WIOA@dol.gov or contact your ETA regional Office.



The Workforce Innovation and Opportunity Act

Fact Sheet: Governance and Leadership

The Workforce Innovation and Opportunity Act (WIOA), signed into law on July 22, 2014, is the first legislative reform of the public workforce system in 15 years. The law supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.

WIOA presents an extraordinary opportunity to improve job and career options for our nation's workers and jobseekers through an integrated, job-driven public workforce system that links diverse talent to businesses. It supports the development of strong, vibrant regional economies where businesses thrive and people want to live and work.

WIOA retains the nationwide system of one-stop centers, which directly provide an array of employment services and connect customers to work-related training and education. WIOA furthers a high quality one-stop center system by continuing to align investments in workforce, education, and economic development. The new law places greater emphasis on one-stops achieving results for jobseekers, workers, and businesses. WIOA reinforces the partnerships and strategies necessary for one-stops to provide job seekers and workers with high-quality career services, education and training, and supportive services they need to get good jobs and stay employed, and to help businesses find skilled workers and access other supports, including education and training for their current workforce.

HIGHLIGHTS OF THE WIOA REFORMS FOR GOVERNANCE

WIOA seeks to improve the effectiveness of and streamline the governing structures of the public workforce investment system, empower elected officials and workforce boards, establish structures for working regionally aligned with regional economies, and engage the key stakeholders needed to lead the system to achieve the goals of WIOA.

WIOA empowers State and Local elected officials and private sector-led workforce boards with the responsibility of developing a strategic, integrated plan that supports economic growth and labor force needs intended to grow the capacity and performance of the workforce system. WIOA authorizes the following changes:

- Streamlines membership requirements for State and Local workforce boards while maintaining a majority of business representation
- Requires certification and continuous improvement of one-stop centers by the Chief Elected Officials and the workforce boards

WIOA PROGRAMS

WIOA authorizes the one-stop career center (also known as American Job Center) service delivery system and six core programs. The core programs are:

- WIOA Title I (Adult, Dislocated Worker and Youth formula programs) administered by Department of Labor (DOL);
- Adult Education and Literacy Act programs administered by the Department of Education (DoED);
- Wagner-Peyser Act employment services administered by DOL; and
- Rehabilitation Act Title I programs administered by DoED.

WIOA also authorizes the Job Corps program, the YouthBuild program, Native American programs, and Migrant and Seasonal Farmworker programs, as well as evaluation and multistate projects.

The law supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.



The Workforce Innovation and Opportunity Act

- Adds Vocational Rehabilitation, Adult Education, and Registered Apprenticeship as required board members and increases the voice of labor on the board
- Identifies 13 functions for Local workforce boards. Among them are:
 - Analyses of regional conditions;
 - Leading efforts to engage employers;
 - Leading efforts to develop and implement career pathways;
 - Identifying and promoting proven and promising practices;
 - Establishing standing committees to more effectively accomplish the work of the local boards;
 - Better utilizing technology to facilitate connections among the intake and case management information systems of one-stop partners, to access services provided through the one-stop system (including remote areas), to meet the needs of individuals with barriers to employment, and to leverage resources and capacity;
 - Promoting consumer choice of participants among providers;
 - Enhancing coordination with education providers; and
 - Assessing the physical and programmatic accessibility of one-stop centers annually in accordance with applicable nondiscrimination provisions under Title I of the WIOA and the Americans with Disabilities Act.
- Identifies 12 functions for State workforce boards. Among them are:
 - Review of statewide policies and programs and development of recommendations on actions state should take to align core and other programs in a manner that supports a comprehensive system, including the review and provision of comments on state plans for activities and non-core programs of one-stop partners.
 - Development of guidance for the implementation and continuous improvement of the workforce development system (addressing alignment, career pathways, sector partnerships, coordination between states and local areas, identification of regions, technical assistance, case management information systems)
 - Identification and dissemination of best practices
 - Development and review of statewide policies affecting the coordinated provision of services through the one-stops
 - Development of strategies for technological improvements
 - Development of statewide workforce and labor market information systems

EFFECTIVE DATES FOR IMPLEMENTATION AND TECHNICAL ASSISTANCE

In general, WIOA takes effect on July 1, 2015; however, the planning requirements common indicators of performance take effect on July 1, 2016 and other exceptions specifically noted in the law.

DOL is working in coordination with the Department of Education and the Department of Health and Human Services to support the public workforce system to implement WIOA. The DOL WIOA Resource Page (www.doleta.gov/WIOA) will include updated guidance and resources, as well as communicate opportunities to provide input. The WIOA Collection Page (wioa.workforce3one.org) provides links to technical assistance tools and information to support implementation. Questions regarding WIOA can be emailed to DOL.WIOA@dol.gov.



The Workforce Innovation and Opportunity Act

Fact Sheet: One-Stop Career Centers

The Workforce Innovation and Opportunity Act (WIOA), signed into law on July 22, 2014, is the first legislative reform of the public workforce system in 15 years. WIOA presents an extraordinary opportunity to improve job and career options for our nation's workers and jobseekers through an integrated, job-driven public workforce system that links diverse talent to businesses. It supports the development of strong, vibrant regional economies where businesses thrive and people want to live and work.

HIGHLIGHTS OF WIOA REFORMS FOR ONE-STOP CENTERS

WIOA retains the nationwide system of one-stop centers, which directly provide an array of employment services and connect customers to work-related training and education. WIOA furthers a high quality one-stop center system by continuing to align investments in workforce, education, and economic development to regional in-demand jobs. The new law places greater emphasis on one-stops achieving results for jobseekers, workers, and businesses. WIOA reinforces the partnerships and strategies necessary for one-stops to provide job seekers and workers with the high-quality career services, education and training, and supportive services they need to get good jobs and stay employed, and to help businesses find skilled workers and access other supports, including education and training for their current workforce.

Improved Access to Comprehensive Services

- Each local area must have one comprehensive one-stop center that provides access to physical services of the core programs and other required partners.
- In addition to the core programs, for individuals with multiple needs to access the services, the following partner programs are required to provide access through the one-stops: Career and Technical Education (Perkins), Community Services Block Grant, Indian and Native American Programs, HUD Employment and Training Programs, Job Corps, Local Veterans' Employment Representatives and Disabled Veterans' Outreach Program, National Farmworker Jobs Program, Senior Community Service Employment Program, Temporary Assistance for Needy Families (TANF), Trade Adjustment Assistance Programs, Unemployment Compensation Programs, and YouthBuild. TANF is now a required partner, unless the Governor takes special action to make TANF an optional one-stop partner.
- WIOA eliminates stand-alone Wagner-Peyser Employment Service offices. These services will now be provided alongside partner programs within one-stop centers.

WIOA PROGRAMS

WIOA authorizes the one-stop career center (also known as American Job Center) service delivery system and six core programs. The core programs are:

- WIOA Title I (Adult, Dislocated Worker and Youth formula programs) administered by Department of Labor (DOL);
- Adult Education and Literacy Act programs administered by the Department of Education (DoED);
- Wagner-Peyser Act employment services administered by DOL; and
- Rehabilitation Act Title I programs administered by DoED.

WIOA also authorizes the Job Corps program, the YouthBuild program, Native American programs, and Migrant and Seasonal Farmworker programs, as well as evaluation and multistate projects.

The law supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973.



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The Workforce Innovation and Opportunity Act

- A local area also may have additional affiliate one-stop centers with any subset of partners, or specialized centers.
- Local boards have the flexibility to include additional partners in one-stop centers. The law specifically identifies the following federally funded partners: Employment and training programs administered by the Social Security Administration, including the Ticket to Work and the Self-Sufficiency Program; employment and training programs carried out by the Small Business Administration; Supplemental Nutrition Assistance Program (SNAP) employment and training programs; Client Assistance Programs; and programs authorized under the National and Community Service Act of 1990.
- WIOA allows other partners to be part of the one-stop delivery system, including local employers and community-based, faith-based, and/or non-profit organizations, as well as employment, education, and training programs provided by public libraries or in the private sector.

Enhanced and Streamlined Operations:

- Local areas are encouraged to integrate the intake, case management, reporting, and fiscal and management accountability systems of one-stop partners.
- All partners are required to share in the funding of services and infrastructure costs of the one-stop delivery system.
- One-stop operators will be selected through a competitive process.
- Local boards are responsible for improving access to and the effectiveness of one stop and program services.
- Local boards continue to be required to negotiate and regularly review a Memorandum of Understanding (MOU) with every one-stop partner to describe operations, services provided and coordinated, funding, and referrals. MOUs will be reviewed every three years.
- Local boards will certify one-stops every three years, using criteria written by the state Workforce Development Board that covers effectiveness, programmatic and physical accessibility, and continuous improvement. Local Workforce Development Boards may also establish additional certification criteria.

Better Public Recognition

- WIOA calls for the Department of Labor to establish a common identifier, also known as a “brand”, for the one-stop system to help job seekers and employers readily access services. The common identifier will be established through the final rule, with guidance and implementation assistance provided by ETA.

EFFECTIVE DATES FOR IMPLEMENTATION AND TECHNICAL ASSISTANCE

In general, WIOA takes effect on July 1, 2015; however, the planning requirements common indicators of performance take effect on July 1, 2016 and other exceptions specifically noted in the law.

DOL is working in coordination with the Department of Education and the Department of Health and Human Services to support the public workforce system to implement WIOA. The DOL WIOA Resource Page (www.doleta.gov/WIOA) will include updated guidance and resources, as well as communicate opportunities to provide input. The WIOA Collection Page (wioa.workforce3one.org) provides links to technical assistance tools and information to support implementation. Questions regarding WIOA can be emailed to DOL.WIOA@dol.gov.



EMPLOYMENT AND TRAINING ADMINISTRATION
UNITED STATES DEPARTMENT OF LABOR

Office of the Governor: Agency Subdivisions

Labor and Workforce

Address: State Capitol Bldg., 900 Court St. NE, Suite 160, Salem 97301

Phone: 503-373-1558

Fax: 503-378-6827

Contact: Elana Pirtle-Guiney, Labor and Workforce Policy Advisor

Duties and Responsibilities: The Labor and Workforce policy advisor represents the governor on labor and collective bargaining issues. In addition, the advisor guides development of state-level policy related to education and workforce issues by providing leadership for and serving as a liaison between state and local efforts in education, training and workforce development, and by ensuring alignment of statewide, local and regional strategic plans through collaboration with local workforce investment boards. The advisor seeks input from business and industry organizations, labor organizations, state agencies, local education providers, local government, community-based organizations, and public and private postsecondary colleges and schools.

http://bluebook.state.or.us/state/executive/Office_Governor/office_gov_subdiv.htm

Subject: Local Board Chartering Checklist

From: HUMELBAUGH Karen M * CCWD <Karen.M.HUMELBAUGH@oregon.gov>

Date: April 16, 2015 at 5:19:31 PM PDT

To: "amcgough@worksystems.org" <amcgough@worksystems.org>, Bridget Dazey <bridget.dazey@wicco.org>, Tony Frazier <tfrazier@inciteworks.org>, PAYNE Kristina <kristinap@laneworkforce.org>, Jim Fong <JimF@jobcouncil.org>, "Tim McGann" <tim@tocowa.org>, Mike & Libby Kennedy <mikeandlibby@comcast.net>, "brosholt@eoni.com" <brosholt@eoni.com>
Cc: LEONI Melissa * OED <Melissa.LEONI@oregon.gov>, ROBERTS Katelyn J * CCWD <Katelyn.J.ROBERTS@oregon.gov>, TACKMAN Kurt R * CCWD <Kurt.R.TACKMAN@oregon.gov>, 'John Chamberlin' <jchamberlin@worksystems.org>, "klitvin@prjmasters.com" <klitvin@prjmasters.com>

All- As requested, CCWD has reevaluated the charter criteria and interim plans process for 2015. We have revised our original guidance and are now asking you to complete a short checklist indicating your board's compliance with the charter criteria versus the entire chartering criteria adopted by the OWIB last year. We have spoken with the OWIB Executive Committee and they are supportive of this shift.

Executive Order 13-08, issued in July 2013, directed that all local boards be chartered under a set of criteria approved by the Oregon Workforce Investment Board (OWIB). In May of 2014, the OWIB adopted charter criteria and recognized that the criteria reflected new roles for the local boards and would take time to meet. The guidance from CCWD sent to you in November 2014 acknowledged that two significant shifts had occurred – changes to local area boundaries and the Workforce Innovation and Opportunity Act (WIOA) – and revised the approach to the chartering process.

The implications of those shifts have been unfolding over the past four months and have had a more significant impact than we anticipated. For example, it's become clear that there is alignment between the Executive Order and WIOA; the majority of the charter criteria are included in the local plan requirements under WIOA and will be included in plans that are developed over the next year. It's also become clear that the efforts to build or create local boards where there have been boundary or administrative structure changes have taken longer than expected.

So, in an effort to focus on the broader federal and state workforce objectives and reduce premature or duplicative work, we are asking each of the local areas to complete the attached chartering criteria checklist by the following dates:

- May 15, 2015 for existing and transitioning boards
- September 1, 2015 for new boards

Questions specific to the checklists and completed checklists should be directed to Kurt Tackman (503.947.2439 or Kurt.R.Tackman@oregon.gov).

CCWD will extend existing plans through June 30, 2016 for existing and transitioning boards after receipt of the checklist. By June 30, CCWD will also ensure that the new boards are in compliance with federal and state regulations and have sufficient capacity to execute functions of a local board. Beginning in July, CCWD will provide technical assistance for the new boards and directors to better understand and respond to the charter criteria checklist.

As discussed previously, the OWIB will be going through their Strategic Planning Process from May-September and CCWD will issue local planning guidance by October 1, 2015. This guidance will include a planning toolkit and training to assist all boards in their development of a new, WIOA-compliant local plan.

We hope this modified and much shorter process will benefit all of us. Questions about topics not specifically related to the checklist should be directed to Karen.

Thanks-

Karen and Melissa

Local Board Charter Criteria Checklist For Existing and Transitioning Boards

Local Board Name:	
Counties Comprising the Local Area:	
Submitted By:	Date:
Title:	

Instructions: Please indicate whether or not the local board is in compliance with each statement. If “no” is indicated, please provide a brief explanation as to the reason(s) and estimated timeline for completion.

Serving as a Neutral Convener

The local board, referred to in the above table, understands it must serve as a neutral, independent broker of workforce services for Adults, Dislocated Workers, and Youth.

☐ Yes

☐ No; Explanation:

The local board has defined its mission, vision, approaches to convening partners and procuring service providers that support the role of being a neutral convener.

☐ Yes

☐ No; Explanation:

The local board has organizational charts that depict a clear separation between the board and services provision.

☐ Yes

☐ No; Explanation:

The local board has current contracts/agreements with service providers for Adult, Dislocated Youth, and Youth services.

☐ Yes

☐ No; Explanation:

The local board has methods to evaluate effectiveness of activities and modify strategies as needed.

☐ Yes

☐ No; Explanation:

The local board has the ability to provide data to state for performance management

☐ Yes

☐ No; Explanation:

The local board has data accuracy and security policies in place.

☐ Yes

☐ No; Explanation:

Building Key Partnerships

The local board has identified key sectors and is developing industry sector partnerships.

☐ Yes

☐ No; Explanation:

The local board is partnering with the Governor's Regional Solutions Committees and Economic Development organizations.

☐ Yes

☐ No; Explanation:

The local board has strategies to support the achievement of Oregon's "middle 40" goal, including expanding options for people to earn certifications via the local workforce system, investing in those options and getting people trained (related to the certifications).

☐ Yes

☐ No; Explanation:

The local board will be engaging partners, in addition to those required by the Workforce Innovation and Opportunity Act (WIOA), in the local planning process.

☐ Yes

☐ No; Explanation:

The local board has identified goals for becoming a Certified Work Ready Community (CWRC) including goals for the National Career Readiness Certificate (NCRC).

☐ Yes

☐ No; Explanation:

Using Labor Market Expertise to Guide Local Implementation

The local board has a plan to develop a state of the workforce reports.

☐ Yes

☐ No; Explanation:

The local board shares data with partners to inform decisions.

☐ Yes

☐ No; Explanation:

Managing Investment and Accountability for System Results

The local board has an approved budget.

☐ Yes

☐ No; Explanation:

The local board has plans to leverage and increase resources.

☐ Yes

☐ No; Explanation:

Signature: _____

Date: _____

Title: _____



Action Brief

To: Rogue Workforce Partnership

From: Jessica Gomez • Chair, Rogue Workforce Partnership
Jim Fong • Executive Director, Rogue Workforce Partnership
Doug Mares • Region Manager, Oregon Department of Human Services

Date: May 11, 2015

Subject: Selection of Workforce Oregon Center Service Provider

Background

Pursuant to prior RWP authorization, a designated **Selection Team** has been actively working to review proposals submitted in response to a Request for Proposal, issued jointly by the Rogue Workforce Partnership and the Oregon Department of Human Services - in order to select a **Service Provider** for the Rogue Valley's WorkSource Oregon Centers. Services to be provided include those funded through:

- WIOA - Adult & Dislocated Workers (*Workforce Innovation & Opportunity Act*)
- TANF - JOBS (*Temporary Assistance to Needy Families - Job Opportunities and Basic Skills*)
- SNAP - OFSET (*Supplemental Nutrition Assistance Program – Oregon Food Stamp Employment Transition*)
- WIOA - Out-of-School Youth
- TANF – Teen Parent

Proposal Review & Interview Process

Four proposals were received from the following organizations:

- College Dreams
- Siskiyow Training & Employment Program, Inc.
- Providence Community Services, Inc. dba Ross Innovative Employment Solutions
- Arbor E&T, LLC, dba ResCare Workforce Services

The following evaluation and selection process steps were then followed:

- The College Dreams proposal failed to include a required component and, per the procurement guidelines, was removed from further consideration.
- The remaining three proposals were reviewed and received the following aggregated scores:

Proposer	Aggregated Score (700 points possible)
Siskiyow Training & Employment Program, Inc.	343
Providence Community Services, Inc. dba Ross Innovative Employment Solutions	519
Arbor E&T, LLC, dba ResCare Workforce Services	612

- Two top candidates were chosen for interviews. Interviews were held on April 24, 2015 with Providence Community Services, Inc. dba Ross Innovative Employment Solutions and Arbor E&T, LLC, dba ResCare Workforce Services. *See attached Interview Questions.*
- Based on these interviews, Arbor E&T, LLC, dba ResCare Workforce Services was selected as a top candidate to engage in further evaluation activities. They submitted additional program information documents and budget scenario estimates, and were asked to return this week for a three day in-depth review process which consisted of meetings with The Job Council staff, and follow-up discussions with the Selection Team. In addition, the Selection Team contacted references and gathered feedback as to the actual performance of Arbor E&T, LLC, dba ResCare Workforce Services in other One-Stop Centers across the nation. *See attached documents describing this phase of the selection process, and also summarizing the reference information.*
- Upon completion of this process, the Selection Team met yesterday and unanimously arrived at a strong consensus decision to select Arbor E&T, LLC, dba ResCare Workforce Services as the Service Provider for the Rogue Valley's WorkSource Oregon Centers – to provide services for all the funding streams designated for the WSO Centers.

Since this is a joint procurement done in partnership between the Rogue Workforce Partnership and the Oregon Department of Human Services, the RWP Board of Directors must now take action to approve this selection.


Representative members of the Selection Team will be available to discuss and answer questions about this evaluation and selection process in greater detail at the May 1st RWP Board of Directors meeting.

Recommendation

That the Rogue Workforce Partnership affirm the selection made by the Rogue Workforce Partnership Board of Directors at their May 1, 2015 meeting for Arbor E&T, LLC, dba ResCare Workforce Services to serve as the Rogue Valley's WorkSource Oregon Service Provider beginning Program Year (PY) 2015 (July 1, 2015 to June 30, 2016), with the option for one additional one-year contract and two additional two-year contracts at the discretion of the Rogue Workforce Partnership and the Oregon Department of Human Services

WorkSource Oregon Centers of the Rogue Valley

Final Interview Process & Next Steps - v. for Selection Team

 = activities not listed on ResCare's Schedule



ROGUE WORKFORCE
PARTNERSHIP



April 26, 2015

When	What	Who
Monday, April 27th By Noon	Send out joint email from TJC, DHS & OED Leadership Team to all staff – TJC, DHS, OED <ul style="list-style-type: none"> Update staff on selection process & next steps, & invite to meet with representatives from ResCare Send out ResCare resumes (Tim & Michael's) with email? 	Aurora, with Jim Prep for Selection Team review & finalization (via email)
Monday, April 27th By 12 noon or sooner	Additional TANF employment programs and/or other references received from ResCare	Tim Foster / Michael Vu
Tuesday, April 28th By 12:00 noon	All References Contacted <ul style="list-style-type: none"> All references contacted & interviews either completed or appointments set-up so reference checks done by Wednesday 	Reference Check Team Jim, Doug, Aurora, Rosemary & Billie
	On-line Survey Tool in Place <ul style="list-style-type: none"> To allow us to gather question & feedback from staff (Or, we can just rely on comments, emails from staff instead?) 	Aurora Prep for Selection Team review & finalize (by email)
Tuesday, April 28th By 1:00 p.m. or sooner	"Homework" Assignment Due <ul style="list-style-type: none"> Please submit as much of it as you can by this time or sooner 	Tim Foster / Michael Vu
Tuesday, April 28th 1:00 to 1:30 p.m.	Welcome & Orientation Meeting with ResCare <ul style="list-style-type: none"> Welcome & orient to what we'll be doing & any schedule changes the next 3 days Meet at 100 E. Main Street, Suite A • Medford 	Jim & Selection Team - as available
Tuesday, April 28th 1:30 to 4:00 p.m.	Medford Staff Meeting with ResCare <ul style="list-style-type: none"> Job Council, DHS & OED staff meet with ResCare Opportunity for staff to meet & greet; ask questions & get informed about ResCare, in order to provide input to Selection Team 	All Staff – as available Selection Team - as available
4:00 to 5:00 p.m.	Time for one-on-one connections, questions, etc.	
Wednesday, April 29th 8:30 to 11:00 a.m.	Grants Pass Staff Meeting with ResCare <ul style="list-style-type: none"> Job Council, DHS & OED staff meet with ResCare Opportunity for staff to meet & greet; ask questions & get informed about ResCare, in order to provide input to Selection Team 	All Staff – as available Selection Team - as available
11:00 to 12:00 noon	Time for one-on-one connections, questions, etc.	
Wednesday, April 29th	"Homework" Assignment Due – Final	Tim Foster / Michael Vu

When	What	Who
1:00 p.m.	<ul style="list-style-type: none"> › Please submit any outstanding assignments by this time or sooner 	
Wednesday, April 29th By 1:30 p.m.	Reference Checks Completed <ul style="list-style-type: none"> › Reference Check Team – bring your notes, ready to be copied 	Reference Check Team
Wednesday April 29th 1:30 to 4:30 p.m.	Selection Team Meeting & Debrief <ul style="list-style-type: none"> › To process staff meetings & information garnered from references; develop questions / lines of inquiry for final interview, any final review/selection tool(s), etc. 	Selection Team
Thursday, April 30th Morning or Lunch?	Possible Rogue Workforce Partnership Board of Directors / Executive Committee Meeting with ResCare?	Rogue Workforce Partnership Board of Directors
Thursday April 30th 1:00 to 3:30 p.m.	Final Interview by Selection Team with ResCare <ul style="list-style-type: none"> › Final round of questions, review of “homework” submissions, etc. 	Selection Team & ResCare
Thursday, April 30th 3:30 to 5:00 p.m.	Selection Team Meeting for Final Decision-Making / Recommendations	Selection Team
Friday, May 1st 11:30 to 1:00 p.m.	Rogue Workforce Partnership Board of Directors Meeting <ul style="list-style-type: none"> › Review & consensus/approval of next steps recommendations from Selection Team 	RWP Board & Staff, & DHS

All dates, times and activities are tentative – to be firmed up Monday and finalized Tuesday



WorkSource Oregon Centers of the Rogue Valley Interview Questions for Selected Proposers

Adult Employment Programs – WIA/WIOA, TANF, SNAP, etc.

1. Our regional partners are very committed to a strength and asset-based approach; it is a very strong part of the joint organizational culture . . .
 - a. How do you manage, not just to outcomes and your regiment of operational and quality control, but also teach staff to engage with the customer in a strength and asset-based manner?
 - b. How would your training and processes blend with our historical strength-based approach to addressing staff performance issues?
2. Tell us about the corporate culture at the local level, how does it manifest in the daily work?
 - a. How would you work to blend in with our strength-based culture, our expertise, and our ways of doing the work (*e.g., quality of standards in foundational skills training tailored to different customer needs; customizing these trainings to different locations/customer needs, etc.*)?
 - b. How would you honor our in-house experts (LMI, coaching, training & development, case management, etc.)? As you hire staff – how are you going to work with them and how are you going to respect who they are and what they know?
 - c. Let's play out a scenario – we'll describe our Foundational Skills training to you; how would blending our priorities and service delivery preference blend with your organizational norms, culture and way of doing business? Let's explore this in some depth.
 - d. Provide a list of either your already listed references or additional references that can speak directly to their specific experience with your organization in regards to your culture blending capacity.
3. How do you make sure that your management team does what our funding partners want to get done?
4. Do you make your trainings available to all our partners (DHS, OED, others)? Are you open to creating a training partnership to blend and leverage your trainings with the ones our partnership will continue to be creating and investing in (*e.g., Motivational Interviewing, Circle of Courage, Trauma Informed Care, etc.*)?
5. In your hiring, setting of staff compensation, and other similar processes, have you included or are you open to including local funding partners on your hiring panels and related decision making process?

6. Describe your Sector Strategies efforts – the range, scope and specific industry sector examples. What have you learned and what are your best practices in this area?
7. At the frontline staff level, we have very strong, effective relationships between DHS case managers and WSO Center staff. How would you ensure this continues? Give examples and references.
8. In services areas where you're operating WIA and TANF contracts in common locations, tell us how the services are integrated or not. Do you have a common contract? Are the staff specialized by programs or generic? Please provide to us a full range of your comparative site data on how much WIA training investments are leveraged by TANF customers – the number of customers and dollar amount.
9. With WIOA's priority on serving more vulnerable populations – what would that look like, how would it work? With the workforce emphasis on demand-driven, wanting the most skilled person possible, how do you balance the tension between serving high-risk, high-barrier populations and the business demand for the best highly-skilled and dependable worker able to be productive from day one? How do we skill-up our job-seekers? Can you provide specific examples of people and populations and bridges you built for this capacity?
10. Tell us about your success in operating SNAP employment programs and leveraging WIA resources for these customers. Please provide to us a full range of your comparative site data on how much WIA services investments are leveraged by SNAP employment program customers – the number of customers, services accessed, any training investments, etc.
11. Please provide us data on customer outcomes post job placement – job retention, career/wage advancement, job satisfaction, etc.
12. Please provide data on staff satisfaction, turnover rate. What percentage of staff stay with you after two years and, what do attribute turnover rate to (from exit interview/other data)?

Adults & Youth

13. Do you have any innovative ideas for serving adults or youth in very rural areas? If so, what are they?
14. How do you balance the use of technology-based training and resources with hands-on and contagious collaboration/cohort –based learning for both adults and youth?

Youth – WIOA & DHS Teen Parents

15. Please elaborate on the following:
 - a. What are some evidence-based youth development models & philosophies that you've used? Tell us more specifically about the program design. What's your program model and framework? What's the range of target populations?
 - b. Describe your approach to running youth cohort program models.

- c. Please describe any other youth services or funding streams that are leveraged with WIA or TANF funds, e.g., YouthBuild, BLM, USFS, Youth Conservation Corps, etc.? If so, please describe.
- d. How are you working with teen parents differently? Particularly in very rural areas?
- e. What is the high school completion rate for pregnant and parenting teens in the programs you operate or have operated?

Fiscal / Administrative

16. Please explain your contract structure:

- a. You stated in your proposal your indirect rate. Is this the same as your "Central Services Overhead"? What and/or who is included in that rate?
- b. What is your typical profit rate? What specific deliverables would you typically attach to that rate?
- c. How do you ensure that a maximum amount of your expenditures are spent locally? What kinds of expenditures will a local manager have discretion to make locally?
- d. What commitments can you make on your ability to ensure that staff compensation and benefit levels (*and therefore staff continuity*) are not compromised for profits?

17. Let's do a budget scenario exercise – take our proposed levels of funding.

Provide to us your proposed budget with personnel detail, along with your budget ideas and thinking. Include details on staff benefit package.

Transition Planning

18. Hiring of staff – when can you start?

19. Will you be able to work with us on the timing in the finalization of our budgets, and will you be able to meet operational cash flow needs until your first billing and payment?

Your Questions and/or Additional Comments

20. Do you have any questions for us?

21. Are there any additional comments or presentations (if time permits) that you'd like to share with us?



WorkSource Oregon Centers of the Rogue Valley (RFP 3974)

Reference Check Summary | Proposer: ResCare | May 1, 2015

1. What are ResCare's strengths?

- Brings a national experience and many years of doing this work nationally
- Responsiveness
- Michael Vu really understands what work we do
- When we had a concern or issue, they'd hop to it
- Very results oriented
- Great collaborator
- Nimbleness, flexibility
- They can adjust to meet our needs
- Can talk to them about things
- They're very ethical, as we are
- Customer service is the focus
- They listened to what we wanted to do
- They support local staff
- Treating the workforce board as the customer
- Adjusting to meet your vision
- Rubber always meets the road
- Being able to adjust their contract to manage priorities
- They have people at every level to solve issues
- Really great customer service
- Helpful, not intrusive

How did the transition go?

- Went excellent, had 6-7 people in town

2. What are ResCare's weaknesses?

- Not as smooth as we would have liked
- Really significant who project director is
- Benefit package wasn't bad, but wasn't comparable to what staff had been receiving
- In 10 years, went through 4 directors (could always call Michael Vu to fix the problem)
- Double edged sword, they are very focused on the numbers, could be a good or bad thing
- With performance points in their contract, can influence the work
- Don't pay their front line staff enough, but we didn't do what RWP is doing with compensation

3. What do you love about what this organization does and want them to continue doing?

- They have resources at their fingertips
- Corporate staff who do this all over the place
- Incredible access to qualified people who understand and have experience with the work – great to network with them
- Extensive staff training
- Michael Vu was up here a lot -- if there's a situation where he has to be there, he's there

- They got rid of a center director who couldn't connect data to the operations
- Michael Vu has both program and finance background
- Adamant about adequate resources for training for staff
- They really understand integration
- Michael has been a real difference maker

4. What do you wish they'd start doing?

- Hard question -- they've been such a willing partner
- Nothing
- Focus on targeted populations (more of a systems issue)
- Nothing comes to mind
- Leveraging of various grants against each other

5. What really irritates you about what they do and that you'd like them to stop doing?

- Tough question -- we're in the land of rainbows and ponies
- Succession planning (although not really their fault)
- We learned we didn't ask some right questions (workforce board didn't want to micromanage)
- It's all about who you work with
- Minor annoyances, but nothing stays with me
- Nothing really irritates me -- they're a great provider and do a really great job

6. How would you rate them on a scale of 1-10 in the following areas?

a. Quality of customer service, engagement & satisfaction	9 8 8 8 8/9 8+	Have seen benefit of curriculum Empl Dept partners also trained Highly dependent on Empl Dept partners They do pretty well, do the best they can Bring in customer service training 8 for job seeker & biz services, 9 for workforce board customer Always for improvement, very happy with them
b. Customer job placements	7-8 9 6 8 8 10	Slow start, now going well Business service enterprise Tuff one, hard in general with UI rate going down Local folks who work hard Almost always met them --
c. Customer outcomes post job placement, such as job retention and career/wage advancement	-- 9 8/6-7 -- 10 10	Haven't asked them to focus on this yet To the extent of their performance payment 8 on retention, 6-7 on wage (a lot of that is just our region) Don't measure this Great, we were first in the state --
d. How well they work with business customers	8 9 9 9 9 7	They understand the needs of business and are willing to engage Totally nailed that one -- Have attracted employers to come in for hiring events Great, they helped transform our business services, better connecting the front and back end Very good, but room for improvement (still new)
e. Ability to blend with your region's leadership & organization's priorities, expectations, culture & norms	8-9 8-9 9 8 10 10	They come in and are so incredibly flexible Better program directors -- Same staff who worked under the past contractor Hire locally from community Very focused on taking care of our needs
f. Leveraging resources, both in-kind & cash	8 8 6 9 6 --	Majority of leverage is the resources they have available Pretty good, periodically wrote small grant applications More in-kind, no cash Something they do well, share best practices from other regions Part of their inclination and partnership Haven't done that
g. Staff / team member job satisfaction	7 7 7-8 8 -- 8	We have staff who go through and say "that's not how we do it", but majority of staff are very happy with where they're at Not sure I can answer, don't know There was a big exodus Not much turnover; if any problem, wages & health insurance Don't know Pretty happy
h. Staff training & development	10 10 8 10 6 8	-- Invested a lot of time and resource (all staff, not just employees) -- Didn't have any beforehand, they have lots of good stuff Good, more around leadership than staff (although not super qualified to give an answer) They make a huge effort to do staff training, work hard on morale building

i. Working with employees in progressive disciplinary actions and/or employee morale	7	Really depends on project director; doing strength-based assessment; interested in developing staff as professionals
	--	Don't have much of an opinion
	5-6	Had some circumstances that took longer than they wanted (an issue between a supervisor and another employee)
	8	We're a pretty close group, director has support of corporate
	--	Don't know
	--	No idea (but ResCare has helped Empl Dept manager solve an ED staff issue)
j. The effectiveness of their mentorship program	7	They make sure business services training is provided, also new employee shadow
	--	Don't know
	8-9	They have really good quality management
	--	Don't know
	--	Director looked to Michael Vu as a mentor
	--	Don't know much about it
k. Staff turnover rate & its impact on service quality	8	Majority of staff see as great opportunity
	5	Average (didn't seem any different from Empl Dept)
	--	In spite of exodus, they were able to quickly respond; the quality was maintained. Michael Vu responds very quickly, and can fill in quickly
	9	Not much turnover
	--	There's always turnover, didn't pay great. But never saw an impact on staff morale or customer service
	7	Doesn't happen often
l. Overall rating of satisfaction	8-9	Started out rocky (3-4), but in a really good place now
	8	They are wonderful
	9	I couldn't imagine our system without them; they've been a great partner; Michael Vu is phenomenal
	9	Been very pleased with them
	9	--
	9	They really do a great job, "You'll really like them"