Rogue Workforce Partnership
Workforce Board Meeting

Pacific Retirement Services ⬧ Third Floor, Washington Room ⬧ 1 W. Main St., Medford
September 23, 2015 ⬧ 2:00 – 5:00 pm *+ post-meeting networking social 5:15p at The Bohemian Club, 123 W. Main*

Video/Phone Conference access: https://global.gotomeeting.com/join/623789757. Please activate (share) your webcam & select your audio preference. 1) Telephone: 1+872-240-3412; Access Code: 623-789-757 *(long distance charges will apply)*; 2) or, use computer microphone &speakers *(headset is required, or use mute to avoid reverb)*.

Agenda

1. Welcome & Introductions *(5m)*   Jessica Gomez

2. Consent Agenda - ***Action Item*** *(1-5m)*   Jessica
Consent agenda items are voted on as a block unless a member wishes to pull an agenda item(s) out for discussion
- Approval of Minutes – March 9, 2015 🖹
- Approval of Minutes - May 11, 2015 🖹
- Local Plan Modifications 🖹
- Appointment of Equal Opportunity Officer 🖹

3. State & Regional Coordination
- **Strategic Plan & Dashboard** *(5m)* 🖹   Jessica, Jim

4. Workforce & Education System Transformation

   a. *Sector Strategies* *(30m)*
- **Overview**   Aurora King, Graham Hetland
- **Update, Coordination & Next Steps**
  ‣ Advanced Manufacturing Group   Jessica, Mike Donnelly
  ‣ Information Technology/E-Commerce   Graham, Aurora
  ‣ Healthcare Workforce Steering Committee   Gregg Edwards, Brent Kell

   b. *Certified Work Ready Communities* *(15m)*   Aurora, Brent, John Young
- **National Career Readiness Certificate**

   c. *Systems Innovation*
- **WorkSource Oregon Centers**   Jim Fong
  ‣ **ResCare Workforce Services** *(45m)*
  · **Introduction of New WIOA & DHS Service Provider**   Michael Vu, Tabitha Carlson

  · **Service Provider Transition -** Update, Q&A, Workforce Board Review   Aurora King, Rene' Brandon, Melissa Wolff, Rosemary Jernigan

  · **Affirming Selection of ResCare as WIOA & DHS Service Provider** - ***Action Item*** 🖹 Jessica, Jim

🖹 = Documents are attached or will be handed out at the meeting

    ‣ **Additional Grants/Funding for WorkSource Center Services** *(15 m)*   Jim, Aurora & Melissa

- · Job-Driven National Emergency Grant
- · Back to Work Oregon
- · TANF Pilot & Health Professions Opportunity Grant 📄
- · Rethinking Job Search
- · American Apprenticeship Grant (Manufacturing) 📄

   ‣ **Incumbent Worker & On-the-Job Training Policy -** *__Action Item__* 📄 *(15-20m)*   Jim & Aurora

   ‣ **Update on Layoffs & Rapid Response** 📄 *(5-10m)*   Aurora

- **Southern Oregon Success** *(30m)*
  - ‣ **College & Careers for All Hub** 📄   John Higgins, Brian Shumate
    - · K-12 Perspective   Teresa Sayre, Scott Beveridge
    - · Higher Education Perspective   Kirk Gibson, Steve Thorpe, Sue Walsh, Chris Maples

    - · Careers in Gear – Business Plan & Leightman-Maxey Grant Application   René Brandon

5. News & Links *(5-10m)*   Jim

- **Oregon Annual Job Growth Reach 10-Year High** 📄
- **Haves, Have-Nots in Jackson County Further Apart Than Ever** - *Medford Mail Tribune* 📄
  http://www.mailtribune.com/article/20150913/NEWS/150919958
- **Character's Content -** *Angela Duckworth, University of Pennsylvania* **-** 📄
  https://sites.sas.upenn.edu/duckworth
  http://www.upenn.edu/gazette/0512/PennGaz0512_feature4.pdf
- **Assessing the Investment in College** - *Peter Cappelli, The Wharton School, University of Pennsylvania*
  JPR: http://ijpr.org/post/assessing-investment-college%20-%20stream/0#stream/0
  PBS: http://www.pbs.org/newshour/bb/getting-college-degree-doesnt-always-pay/
- **Should Everyone Go To College?** **-** *Brookings Institute* 📄
  http://www.brookings.edu/research/papers/2013/05/08-should-everyone-go-to-college-owen-sawhill
  http://thedianerehmshow.org/shows/2013-05-08/who-benefits-college-and-why

6. Group Feedback on New Meeting Structure *(5m)*   Jim

7. Other Business   Gregg

8. Adjourn   Gregg

Join us for a Networking Social immediately after our meeting, 5:15 pm at The Bohemian Club, 123 W. Main Street.
We'll be outside on the back porch.

ROGUE WORKFORCE PARTNERSHIP

<u>MINUTES</u>

ROGUE WORKFORCE PARTNERSHIP
March 9, 2015
Pacific Retirement Services – Third Floor, Washington Room
1 W. Main St., Medford, OR

<u>MEMBERS PRESENT</u>:

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*

<u>QUORUM PRESENT</u>: Yes

<u>OTHERS ATTENDING</u>:

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

   <u>National Coordination</u>
   - **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

MINUTES

ROGUE WORKFORCE PARTNERSHIP
May 11, 2015
Pacific Retirement Services – Third Floor, Washington Room
1 W. Main St., Medford, OR

MEMBERS PRESENT:

Michael Donnelly, Jim Fong, Ron Fox, Jessica Gomez, Tanya Haakinson, John Higgins*, Pete Karpa, Brent Kell*, Tolga Latif*, Doug Mares, Tamara Nordin

*= *via phone*

QUORUM PRESENT: Yes

OTHERS ATTENDING:
Governor's Workforce & Labor Policy Advisor – Elana Pirtle-Guiney
ResCare Workforce Services – Michael Vu*
Oregon Employment Department: Tamara Schroeder, Guy Tauer
Department of Human Services: Melissa Wolff, Rosemary Jernigan
Southern Oregon ESD: Gwyn Lema
City of Eagle Point: Jonathan Bilden
City of Grants Pass: Don Abbott
College Dreams: Stacie Grier
Southern Oregon Goodwill Industries: Shae Johns, Matt Chesler
BBSI: Suz Montemayor, Joe Rossi
The Job Council: Aurora King, Graham Hetland, Rene' Brandon, Sherri Emitte, Rob Hegeman, 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 Tamara Nordin at 7:42 am. Introductions were made.

2) **CONSENT AGENDA:**

   DUE TO LACK OF A QUORUM, NO ACTION WAS TAKEN.

3) **STRATEGIC PLAN IMPLEMENTATION & WORKFORCE / EDUCATION SYSTEM TRANSFORMATION**

   Sector Stragegies

   - **Engineering Job Seekers Cohort / Employer Networking** – Jim reported that he was contacted by an individual laid off from Erickson Aircrane who was looking at other career paths. Currently, the individual is working in a temporary position at CareStream.

     Jim introduced Rob Hegeman, Business Employment Specialist with The Job Council who facilitates the weekly Job Net workshop where job seekers attend regularly. Rob spoke to the group about the need for job seekers to have a way to make connections with local employers (informational interviews) and "make the first impression". Aurora added that the Job Net was originally designed

as the finale' for Foundational Skills Workshop. "It is a great opportunity for facilitators to motivate and re-energize the job seeker", Aurora added.

Jim went on to add that we are trying to systematize networking; tying sector strategy work to the work we are doing at the OneStop.

Rob announced that more employers are needed to attend Job Net and that he would like to create a list of employers interested in doing informational interviews. An email will be sent to employers asking them to sign up if they are interested.

Systems Innovation-
- **Southern Oregon Success -** Jim presented information on Southern Oregon Success and a draft governance document. "The concept is that we are bringing together education, social service, healthcare, and business so children and youth can succeed", Jim stated. The RWP is a key partner and convener in this effort. What's next:
  - Fleshing out common performance outcomes / metrics.
  - Implementing applicable best practices from South Texas and Louisville, KY.
  - More partnership, program / investment alignment and synergy taking place at all levels of the continuum than has ever been seen before.

4) GUIDE, INFORM & LEAD STRATEGIC PARTNERSHIPS

National Coordination
- **U.S. Department of Labor –**
  Fact sheets and draft WIOA regulations are available in today's packet. Jim highlighted the governance and leadership handout that includes streamlined membership and describes the roles and responsibilities. He then introduced Elana Pirtle-Guiney the Governor's Workforce & Labor Policy advisor. Elana introduced herself and indicated that she is traveling around the state to visit the different workforce boards. Elana stated that the focus is making sure there is as much consistency as possible, and that we have a results-driven system. Elana shared the Governor's priorities:
  - Collaboration
    - How do we get all regional systems working together?
    - Bridging regional collaboratives critical to moving Oregon forward
  - Equity
    - "Hard to serve" populations
    - Families in generational poverty
    - Communities of color
    - Rural communities
    - Do we know how to reach these populations?
  - Accountability
    - Are we actually meeting our goals that we established?
    - Decide locally the plan for reaching the set goals
    - Best way to approach our population
    - Do we need state resources to assist?
  - Results driven and outcome based

- How are we thinking about our results in the long term?
- Assure program alignment
- Getting the worker more job ready

Elana challenged the group to look at who achieves the best results for the population as a whole, but also where the gaps are in what service providers do well.

- Who can you bring in to reach your rural communities?
- Where are the gaps in the work being done – need to review data
- How are the Coordinated Care Organizations reaching out to people?
- How are the STEM Hubs being inclusive?
- Who are we leaving behind?

Elana asked that if any workforce board members have relationships with legislators to talk to them and provide messaging points for advocacy.

Pete Karpa spoke about the section in WIOA that highlights better access to workforce programs for those who are disabled, and asked if there was a conversation happening with the Governor regarding disability. "We need to become better at working with those who have disabilities", Pete stated. Elana indicated that this is currently being reviewed, and would like to see us move to a system where all individuals are being channeled through the OneStop with wrap around services being included and integrated with the workforce system services.

Elana also indicated that a conversation is taking place with the Governor regarding whether it makes sense to have a Workforce Cabinet.

- **Local Board Chartering Checklist-** Jim reported that each local board must be re-chartered for July 1, 2015. Strategic planning work will start with the state plan due in March 2016. Jim informed the board that he has completed a short checklist, sent by CCWD, indicating our compliance with the charter criteria versus the entire chartering criteria adopted by the OWIB last year.
- **Oregon Workforce Partnership – *Video on Role of Workforce Board*** – The video will be shown at the end of the meeting if there's time.

Regional Coordination

- **Service Provider for WorkSource Oregon Centers** –Jim reviewed the action brief with the group and indicated that the RWP Board of Directors approved and affirmed the selection of Arbor E&T, LLC, dba ResCare Workforce Services 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 on May 1, 2015. Jim asked the Workforce Board to affirm the board of director's decision.

  Michael Vu, Director of Operations at ResCare, joined by phone and thanked the staff and the Board, and indicated their excitement to work with us.

  DUE TO LACK OF A QUORUM, AFFIRMATION WILL BE DEFFERED TO A FUTURE MEETING.

- **New Intergovernmental Agreement-** Jim presented information on the Rogue Valley Workforce Consortium (RVWC) and indicated that one of their responsibilities is to appoint the Workforce Board.

- **New Workforce Development Board Configuration -** The handout presented outlines two options:
  - **Option A –** Keep current K-20 Education and DHS Partners = total membership 35
  - **Option B –** Keep current K-20 Education and DHS Partners + add Oregon Tech = total membership 39

Jim went on to say that in order to effectively manage attendance and decision-making, quorum requirements would be set at approximately the same actual number of members as the current level, but a lower percentage of the increased new membership total.

RWP members present endorsed the following:
  a. Pursue Option B – Important to have Oregon Tech included, as well as more businesses
  b. Move to quarterly, longer meetings (3 hours)
  c. Schedule time for more in-depth discussion and decision-making at the full workforce board meeting
  d. Sub-committees meet monthly and present to the Board for approval quarterly

DUE TO LACK OF A QUORUM NO SPECIFIC ACTION WAS TAKEN. STAFF WILL MOVE FORWARD WITH THE GUIDANCE PROVIDED TO CREATE THE APPROPRIATE STRUCTURE.

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

Action Brief

To: Rogue Workforce Partnership

From: Jim Fong, Executive Director

Date: September 23, 2015

Subject: Region 8 Local Plan Modifications

Below you will see our region's Workforce Investment Act (WIA) and Workforce Investment & Opportunity Act (WIOA) funding allocations for this program year:

Program	FY 15	PY 15/FY16
FY 15 WIA Title 1B Adult (remaining 20%)	$ 140,477	
FY 15 WIA Title 1B Dislocated Worker (remaining 20%)	$ 135,978	
2% Transition Funds – WIA Adult	$ 6,640	
2% Transition Funds – WIA Dislocated Worker	$ 10,257	

PY 15 Formula Allocation-WIOA Title 1B – Youth
    Program
    Admin
    Total
		$ 754,955
		$ 83,883
		$ 838,838

PY 15 Formula Allocation – WIOA Title 1B – Adult
    Program
    Admin
    Total
		$ 718,096
		$ 79,788
		$ 797,884

PY 15 Formula Allocation – WIOA Title 1B - Dislocated Worker
    Program
    Admin
    Total
		$ 813,126
		$ 90,347
		$ 903,473

As the Local Workforce Development Board, the RWP needs to approve these allocations as part of a Local Plan Modification. These annual and additional WIA/WIOA funding allocations will be used to support the region's One-Stop Center workforce services to Adults, Youth, and Dislocated Workers.

Recommended Action:

That the RWP approve the Allocations as indicated above.

ROGUE WORKFORCE
PARTNERSHIP

Action Brief

To: Rogue Workforce Partnership

From: Jim Fong, Executive Director

Date: September 23, 2015

Subject: Appointment of One Stop Equal Opportunity Officer

Background

The Rogue Workforce Partnership has the responsibility to appoint the Equal Opportunity Officer for the One Stop Center and One Stop System. EO Officers are responsible for handling any equal opportunity complaints against any of the One Stop partners located in the One Stop Center, at affiliate sites or at partner sites.

The previous EO Officer was an employee of The Job Council which no longer exits due to the organization restructure.

A review was conducted and the determination made that Sherri Emitte, Director of Administration for the Rogue Workforce Partnership, is best suited to serve in this role.

Recommended Action

It is recommended that the Rogue Workforce Partnership appoint Sherri Emitte as the regions Equal Opportunity Officer for the One Stop Center and One Stop System.

Executive Summary

The goal of this strategic plan is to create a road map for the workforce system to capitalize on its strengths, identify and address obstacles, and promote continuous improvement of services through actionable recommendations and guidance.

The OWIB's goals and strategies will provide guidance to local workforce development boards, but are not intended to act as an implementation plan for local services. The OWIB's strategic plan will provide goals on what is to be accomplished, but local boards will determined how the work is done, creating plans that will work for the unique characteristics of each area. The OWIB will provide guidance and access to best practices, and will facilitate connections between local areas and other agencies where appropriate.

This plan identifies four key goals critical to successfully achieving the OWIB's stated vision. Throughout the goals and strategies outlined in this document there are several themes that cross areas, including improving equity, efficiency, and accountability to performance and customer needs. With this focus on accountability, there are several key elements that will be a change for the workforce system as a result of this strategic plan.

- EMPHASIS ON TRAINING – A focus on occupational training will ensure that individuals are developing skills that are directly transferable to a job. The OWIB will require a minimum threshold of funds be spent on occupational training.
- EVALUATING EFFECTIVENESS – As resources become scarcer, it is important to make certain that funds are being spent in the most effective way possible. The OWIB will promote evaluation of program spending through return on investment analysis to monitor effectiveness of spending.
- MONITORING – In another effort to increase effectiveness a focus on monitoring will ensure not only that plans are in place, but they are being carried out successfully. The OWIB will promote accountability through increased monitoring of compliance and performance, producing results that will be shared with the public to promote transparency.
- INCENTIVES AND CONSEQUENCES – To further promote accountability and follow through, the OWIB will promote a system of incentives for successes and effectiveness and consequences for a lack of adherence to policy.

The transformation proposed by this plan will require a set of action steps be outlined to provide a roadmap for implementation. Subcommittees will work to create the action steps that will accomplish each, or in some cases more than one, of the strategies. These action steps will include detailed information on who should be involved, what resources are needed, timelines, and metrics for success.

While the OWIB will share responsibility for implementation with local workforce boards, state agencies and partner organizations, it is necessary to include all of these action steps as a part of the strategic plan to assure coordination of efforts under the OWIB's responsibility to oversee continuous improvement accountability of the system at all levels.

for the full plan, please click on http://www.oregon.gov/owib/boardmeetingsandevents/
documents/2015/9-18-15_Packet_Revised9.15.pdf

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: September 23, 2015

Subject: Selection of WorkSource 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
- Siskiyou 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)*
Siskiyou 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

Rogue Valley TANF Pilot Project

A. Overarching Goal

- To provide targeted community college career pathway training opportunities to TANF and ERDC clients that will result in them obtaining jobs with sufficient initial wages and wage progression so that they can move out of poverty, move off public assistance benefits and move into self-sufficiency.

- To demonstrate innovative best practices for streamlining and integrating the services between WorkSource Oregon Centers and DHS programs.

- To improve the health and vitality of the Southern Oregon economy through creating sustainable employment opportunities to benefit some of the most vulnerable citizens who have been affected by multigenerational poverty and other significant barriers to employment.

- To create opportunity for younger generations of TANF and ERDC clients to visualize themselves prospering professionally and personally through witnessing their parents gaining success in education and the workforce.

B. Geographic Scope

- Jackson and Josephine Counties.

C. Background

- **Building on Our Region's Leadership Capacity in Cross-Agency Service Integration**

  ‣ This pilot project will build upon the region's best practices in cross-agency service integration[1] between the Rogue Workforce Partnership, Oregon Employment Department (OED), and Oregon Department of Human Services (DHS).

  ‣ The Rogue Workforce Partnership (RWP) is the region's federally authorized local Workforce Board and is a key catalytic leader in transforming Oregon public workforce system. RWP oversees the WorkSource Oregon (WSO) One-Stop Career Centers in the region.

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[1] Oregon Secretary of State Audit Report, "Temporary Assistance for Needy Families: High Expectations, Stronger Partnerships, and Better Data Could Help More Parents Find Work," April 2014

- **Leading Efforts to Meet New Federal and State Requirements to Streamline Services & Improve Customer Service & Outcomes**

  ‣ Under the new federal Workforce Innovation and Opportunity Act (WIOA), DHS and other workforce partners are required to intensify the integration of their workforce programs with the WSO Centers to create a more streamlined and unduplicated system. This pilot project will help lead the way in this streamlining effort.

  ‣ Partners will develop, document and demonstrate best practice innovations that can be replicated in other regions of the state.

D. <u>Assumptions & Program Hypothesis</u>

- Current DHS JOBS Program contract and partnership configurations have not been updated since the early 1990s and do not uniformly take into account partnering with Oregon's redesigned public workforce system created in 2007 by local Workforce Boards, the Oregon Employment Department, and the Office of Community Colleges and Workforce Development. As a result, in the majority of regions in the state, duplicate programs and service capacities exist side-by-side, with little coordination.

  In the Rogue Valley, we have integrated these services and created a set of Foundational Skills and cohort-based skills trainings in our WSO Centers that feed into next step Vocational Training and Worksite-Based Training (such as Back-to-Work Oregon On-the-Job Training, JOBS Plus and Internships/Work Experience).

- By further integrating these service capacities, we can leverage resources from multiple funding streams (TANF-JOBS, WIOA, etc.) and, when coupled with the additional capacities provided through this pilot project, we will be able to provide TANF and ERDC (post-TANF) clients with opportunities to make more significant and sustained progress along career pathways through a combination of vocational training and worksite training.

- Like all individuals, TANF and ERDC clients have a very broad range of personal assets, capacities, interests, motivations and barriers in their path to greater self-sufficiency. Many clients have significant life challenges and barriers to overcome in order to progress *(e.g., homelessness, medical conditions, domestic violence, mental health, substance abuse issues, etc.)*.[2] Some clients display significant limitations in motivation

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[2] See Adverse Childhood Experiences Study at http://www.cdc.gov/violenceprevention/acestudy/ and SAMHSA - Trauma Informed Care link at http://www.samhsa.gov/nctic/trauma-interventions

and capacity to participate in self-sufficiency activities. Others exhibit great motivation, perseverance and tenacity to overcome hardship and achieve success.

In addition, even highly motivated and capable clients face significant economic barriers as they get jobs, increase their wages and begin to lose eligibility for various public assistance benefits (TANF, Medicaid, Housing, ERDC, SNAP). These, so called, "benefit cliffs" represent real and daunting challenges for individuals, and many clients make a choice to go back on TANF rather than face these harsh economic uncertainties.

This pilot project will focus on trying to make a difference for these strongly motivated clients and more capable clients - those who demonstrate sufficient motivation and capacity to make consistent progress in their efforts towards greater self-sufficiency. Our goal is to identify such clients, and provide them sufficient skill training opportunities and supports along the career pathway and benefit cliff continuum so that they leave all public assistance rolls and achieve true self-sufficiency.

In focusing on such clients, our intention (and "theory of change") is to better align WorkSource Oregon and DHS programs and capacities so that better career pathway training opportunities can be made available to these and other clients. And, that through a more thoughtful, efficient and intelligent use of public resources, we can produce better client outcomes, while saving taxpayer dollars.

We also wish to create an upwardly spiraling effect on the entire public assistance system. By helping these clients to lift themselves up and out of poverty, and off public assistance benefits, our intention is to create the ongoing capacity, through integrated program delivery, for additional clients to step up and out, following in the footsteps of those who proceeded them.

E. **Outcomes / Success Measures**

We anticipate achieving the following program outcomes:

- Reduction in TANF cases due to job placement and wage progression compared to comparable regions in the state (using longitudinal and as point-in-time data).

- Increased opportunities and placements in high-wage, high-demand jobs for customers on ERDC and TANF compared to those who do not participate in this pilot.

- Greater success in education and career placements for customers in this pilot project (compared to other TANF customers).

- Reduced recidivism of cases back on to TANF, both from ERDC and post-TANF placement.

- For those participants enrolled in this pilot project – track comparative rates of:

- ‣ Participation Rate

- ‣ Training/Activity Completion

- ‣ WIOA and Other Resources Leveraged

- ‣ Job Placement & Career Pathway Potential

- ‣ Initial Wages - we are targeting placements more than $12.39/hr & more than 30 hrs/wk (ideally 40 hrs/wk)

- ‣ Career and Wage Progression

- ‣ Longitudinal data cohorts – track wages over time, 1-3-5 years – are we seeing wage progression; sense of hope, autonomy, intangibles, incentives (through surveys)

- Relevant, timely, and targeted data to utilize in analyzing the effectiveness and return on investment for services designed for the TANF and ERDC customer-base.

  - ‣ Showing a moderate decrease in TANF caseload would demonstrate ROI

F. Employer & Labor Market Demand

- **Labor market information and other pertinent evidence to show an unmet need:** The TANF Pilot Project is a welcome opportunity for southern Oregon's Jackson and Josephine counties, where the region, while making progress from the Great Recession, is nevertheless still considered economically distressed.[3]

  As part of its **Sector Strategies** initiative, the Rogue Workforce Partnership, in collaboration with our region's economic development agency (SOREDI – Southern Oregon Regional Economic Development, Inc.), Regional Solutions Center, and Oregon Employment Department's labor economist, has identified Advanced Manufacturing, E-Commerce/Information Technology and Healthcare as three key industry sectors to focus particular attention on for career pathway development. These industry have a high proportion of high-demand, high-wage jobs.

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[3] Business Oregon, Distressed Areas in Oregon, 2015, found 5/22/15 at
http://www.oregon4biz.com/Publications/Distressed-List/

The Oregon Employment Department's 2012-2022 for high-demand, high-wage jobs shows overall job growth.[4] The TANF Pilot Project will target occupational areas in Healthcare, Advanced Manufacturing and E-Commerce/Information Technology. Table 1 displays example occupations in these industries, projected job openings, wage information and current job vacancies. These selected occupations are displayed for illustrative purposes. Our efforts will focus on providing career pathway training opportunities (predominantly at RCC) which will result in customers getting jobs in occupations with the possibility of wage and career progression such as those represented below.

Table 1: TANF Pilot Project LABOR MARKET INFORMATION						
Occupational Areas	Total Jobs 2012-22	High Wage or Demand**	10th Percentile	90th Percentile	Annual Mean FTE	Job Vacancy Report
Medical Secretaries	552	No	$ 11.16	$ 21.19	$32,499	447
Pharmacy Technicians	120	Yes	$ 12.21	$ 21.52	$ 34,344	84
Sterile Processing Techs	27	Yes	$ 12.44	$ 21.93	$ 34,411	31
Medical Records and Health Info Technicians	85	Yes	$ 10.73	$ 24.52	$ 35,558	158
Billing & Coding Clerks	192	Yes	$ 12.25	$ 22.19	$ 34,656	87
Medical Assistants	350	Yes	$ 12.39	$ 18.88	$ 32,928	406
Nursing Assistants (CNA1)	417	Yes	$9.79	$ 17.55	$28.128	327
Nursing Assistants (CNA2)			NA	NA	$33,000	NA
Practical Nurses	87	Yes	$ 19.24	$ 28.28	$ 47,726	264
Emergency Room Tech, EMT and Paramedics***	71	Yes	$ 11.45	$ 26.66	$ 37,696	61
Traditional Health Workers****	8	No	$ 13.75	???	$ 36,581	1
Dental Assistants	125	Yes	$ 12.63	$ 21.89	$ 35,040	200
Physical Therapy Aides	33	No	$ 9.14	$ 45.12	$ 24,833	24
Phlebotomists***	40	Yes	$ 12.38	$ 20.17	$ 32,975	38

[4] Oregon Employment Department, Rogue Valley Employment Projections by Industry and Occupation for 2012-2022, March 2014.

Clinical Lab Assistants	3	Yes	$ 16.71	$ 35.75	$ 55,662	70
Nurses	834	Yes	$28.01	$ 46.56	$ 77,674	259
Emergency Medical Services Management	86	Yes	$29.45	$54.34	$119,130	74
General & Operations Managers	163	Yes	$19.46	$85.62	$97, 629	40
Architectural & Civil Drafters	-2	No	$17.07	$34.43	$51,449	1
Computer-Controlled Machine Tool Operator, Metal and Plastic	35	no	$11.59	$27.82	$39, 718	7
Computer Numerically Controlled Machine Tool Programmers, Metal and Plastic	2	no	$17.70	$41.29	$57,885	0
Software Developers, Systems Software	5	no	$30.25	$68.75	$100,724	0
Graphic Designers	30	yes	$13.20	$35.07	$47,630	8
Welders, Cutters, Solderers & Braziers	38	yes	$13.33	$25.88	$40,286	10
Helpers—Installation, Maintenance, & Repair Workers	9	no	$9.41	$22.96	$29,604	3
Maintenance & Repair Workers, General	84	no	$11.29	$28.71	$39,997	21
Web Developers	7	yes	$18.36	$45.98	$69,399	2
Tax Preparers	22	yes	$12.51	$29.75	$41,974	5
Bookkeeping, Accounting & Auditing Clerks	234	no	$11.60	$25.95	$37,679	39

Sources:
* Oregon Employment Department's (OED) Job Vacancy Survey for Jackson, Josephine, Douglas, Coos, Curry Counties, 2014.
** OED, High Demand equals jobs that pay more than 2013 median wage.
***OED, Regional wage not available. State wage data substituted.
****Traditional Health Worker (THW): A newer category not well-documented by OED. Includes community health workers (CHW), peer support specialists, health navigation coaches, and doulas per Oregon HB3650, in 2011, to serve Medicaid population, but NOT equivalent to OED LMI so are underrepresented in THW data. For CHW alone, a survey of 3 coordinated care organizations in Jackson, Josephine, Curry, and a portion of Douglas County, estimates hiring 12-16 positions in the next 2 years. Locally, these workers earn $14-20/hour, but operate under a variety of job titles.

G. Program Design & Services

- **DHS Case Management & Referral Services**

Self Sufficiency (SSP) administers the Temporary Assistance for Needy Families (TANF), Supplemental Nutrition Assistance Program (SNAP) and Employment Related Day Care (ERDC) programs on behalf of families living below the poverty level in Jackson and Josephine Counties. SSP case managers regularly determine eligibility for all SSP programs, assess job/education readiness and refer these customers to the WSO Centers in Medford and Grants Pass, where fully integrated employment and training services are provided through combined funding.

The current TANF caseload is 2,994 families. We believe we could identify enough interested individuals from this population to fill up to 75-150 TANF Pilot Project slots per year. An SSP case manager located in the Work Source Oregon (WSO) center will be the referral point for SSP customers. The case manager will hold a reduced caseload and specialize in supporting families participating in Vocational Training (VT) programs or other educational program paths as identified in this proposal.

Referrals will be directed to the SSP specialized case manager in the WSO center in any of the following ways:

‣ Case managers can refer potential customers based on a participant's self-selection for an educational activity. The referral would be sent directly from the case manager to the WSO Center.

‣ Some SSP customers participate in a monthly TANF "Marketplace" event in which a wide array of community partners and services are demonstrated and displayed. These TANF customers are able to self-refer to services at the WSO Center, and may be subsequently referred for consideration in an educational activity.

‣ Participants leaving TANF due to employment, and receiving only medical and SNAP benefits, are also automatically eligible for ERDC benefits if under 185% FPL for 1 year at initial application. If participant exceeds 250% FPL, they are no longer eligible. They may also continue to receive benefits after 1 year if still eligible at 185% FPL.

‣ DHS will collaborate with the local Child Care Resource Network and Early Learning Hubs to help families access high quality child care during hours of participation in work and educational activities.

‣ SSP has contracted for a housing navigator who will work directly with SSP case managers managing cases that are connected to both Child Welfare and SSP. The

Housing Authority of Jackson County has reserved 25 housing units specifically for this population. The housing navigator, in collaboration with the case manager, will also be able to refer these customers to the WSO as a way of connecting to education that will sustain their housing.

‣ Referrals from the Strengthening Preserving and Reunifying Families (SPAR) project, dual program clients from both DHS Child Welfare and SSP. This program has recently implemented GED services for clients. Interests and referrals for Vocational Training may be a logical next step for some clients.

- **WorkSource Oregon Center Services**
  Work Readiness / Career Exploration

  The diagram on page 9 displays the flow of clients from DHS to services at WorkSource Oregon Centers, and then on to Rogue Community College and other training providers. The diagram on page 10 displays the array of services available at the WSO Centers.

  For many clients, exploration of training options will begin at the WorkSource Oregon (WSO) One-Stop Centers. A comprehensive array of services will be available. In the Rogue Valley, contrary to much of the rest of the state, WSO Center services are provided in a highly integrated manner with braided funding from OED, WIOA *and* DHS.

  At WSO Centers, customers embark on career exploration and foundational skill-building activities developed with a human-centered approach. Center staff meets with customers at DHS to smooth the transition.
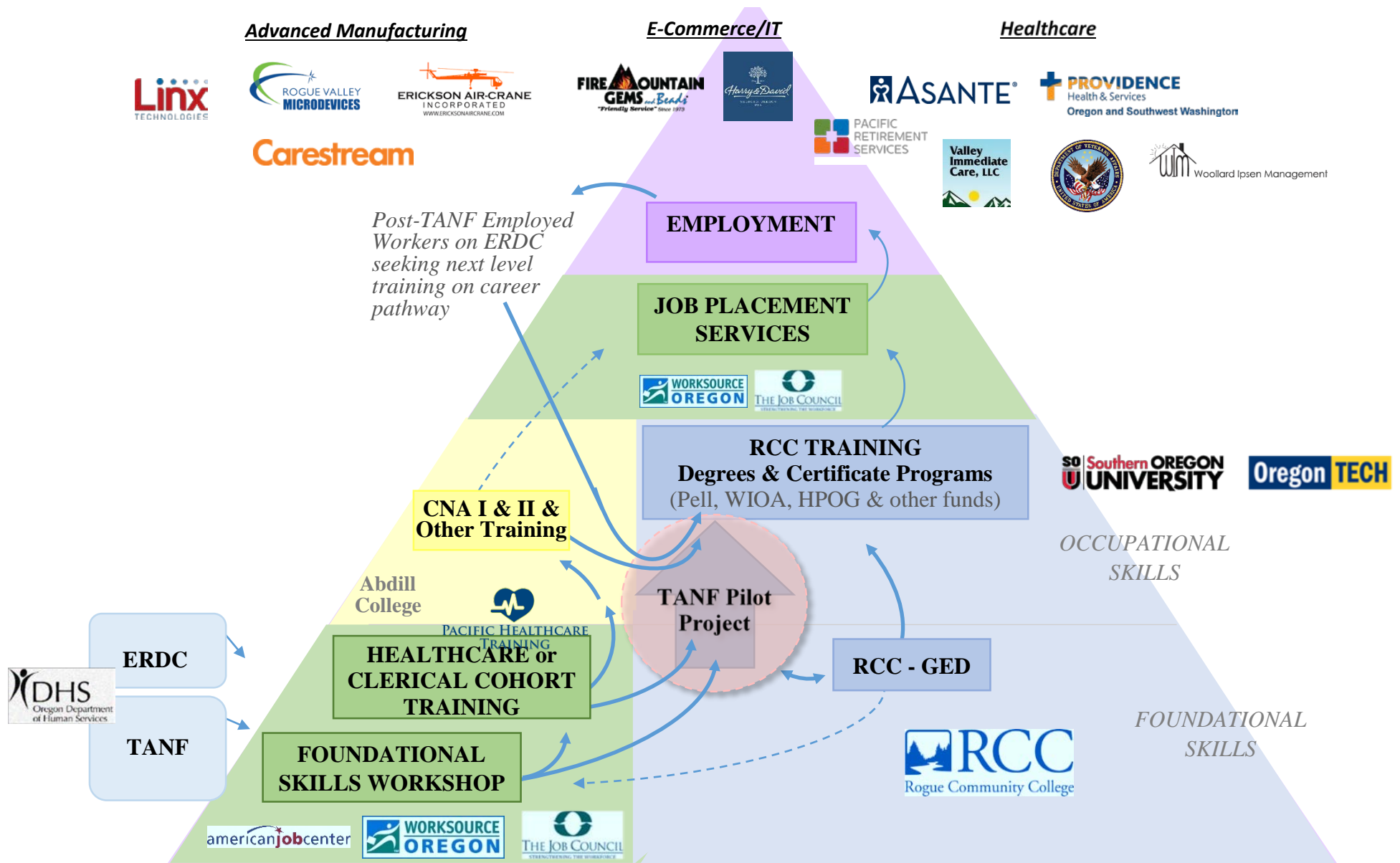
  WSO customers participate in a two-week Foundational Skills *(work-readiness)* workshop that provides core career-building and work-readiness skills in areas such as communication, conflict resolution, job search and completion of a National Career Readiness Certificate (NCRC) work-centered basic-skills credential. Customers demonstrate their proficiency in these areas, and also take the Career Information System assessment to determine career interest areas.

  Following the WSO Foundational Skills workshop, additional 4-week cohort-based workshops that introduce healthcare or clerical careers are offered to TANF clients and others.

  Successful completers of either Foundation Skills or the Healthcare or Clerical Cohorts interested in Vocational Training are referred to the Navigation Coach for suitability

Rogue Valley - Skills Pyramid & Client/Student Flow Chart
TANF Pilot Project

Advanced Manufacturing

E-Commerce/IT

Healthcare

Post-TANF Employed Workers on ERDC seeking next level training on career pathway

EMPLOYMENT

JOB PLACEMENT SERVICES

RCC TRAINING
Degrees & Certificate Programs
(Pell, WIOA, HPOG & other funds)

OCCUPATIONAL SKILLS

CNA I & II & Other Training

Abdill College

TANF Pilot Project

RCC - GED

ERDC

TANF

HEALTHCARE or CLERICAL COHORT TRAINING

FOUNDATIONAL SKILLS WORKSHOP

FOUNDATIONAL SKILLS

Oregon's Public Workforce System

WORKSOURCE OREGON

Supplying Qualified Workers to meet Business Demand

Exploratory Services	Career Services	Training Services	Business Services

• Greeting
• Customized One-on-One
• Next Steps
	• Assessment
	• Career Planning
	• Skills Validation
	• Job Search
	• Placement
		• Adult Education and Literacy
		• Talent Development
		  ▪ Essential Workplace skills
		  ▪ Industry recognized & post-secondary credentials
		• Work-Based Learning
			• Recruitment
			• Customized Training
			• Current Worker Training
			• Job Postings
			• Incentives
			• Rapid Response

INPUTS

Business & Worker Needs

Labor Market Conditions & Predictions

OUTPUTS

Skilled Oregonians

Individual & Business Prosperity

Jobs

OUTCOMES

Customers received a value-added service, learned about available services and know their next steps.	Customers received customized Career Services necessary to identify a career path and/or obtain employment.	Customers received Training Services necessary to obtain the talent, skills, and credentials required to obtain, retain, or advance in employment	Customers provide positive feedback and return for services, and vacant positions are filled timely, with qualified employees referred from WSO centers

MEASURES

Earnings - Employment - Credentials - Retention - Satisfaction

DRIVERS

Customer Focused - Data Driven - Aligned Services & Resources - Shared Performance & Accountability

determination before being referred to a WSO job coach for a criminal background check. Customers may be eligible for other WIOA or different grant-funded vocational skills training scholarships or On-the-Job Training subsidies.

In addition to these services the Oregon Vocational Rehabilitation Services Division meets with clients at the WSO Center on a weekly basis to provide enhanced referrals and connections for clients with disabilities.

Job Search & Job Placement
Job search and job placement services are provided at the WSO Centers by both the Oregon Employment Department and ResCare (service provider staff providing WIOA and JOBS contracted services). Labor market information, resume and interview support, job club (Job Net), targeted work experience (internships), on-the-job training and job development services are provided. The WSO Center has an integrated Business Outreach Team that provides coordinated services to business employers, linking them with qualified job seekers.

- **Navigation Coach**
  A Navigation Coach, funded through this pilot project, will prepare clients and help those selected to transition to training. The Navigation Coach ensues clients make the necessary connections at the post-secondary institution, monitors academic progress and success, and provides on-going support and coaching.

- **Adult Basic Skills**
  The TANF Pilot Project would allow already enrolled Adult Basic Skills students at RCC to be assessed for Vocational Training "scholarships" at the WSO Center. Those deemed program-ready return to the Navigation Coach to sign up for a program orientation to complete the RCC enrollment process and the financial aid application, if applicable. Participants are also assisted with retrieving educational transcripts, getting signed up for the placement test, and are assigned to existing RCC academic adviser. The RCC placement test shows each student's academic skill levels and helps the student and academic adviser to create each student's detailed educational plan.

  WSO participants referred to ABS services will be joined by other ABS participants at a regular RCC GED orientation. All will work with the RCC academic advisor to build a comprehensive educational plan and, if appropriate, transition to Vocational Training.

- **Career Pathway Training (Post-Secondary Training/Education)**

  TANF and post-TANF clients on ERDC (Employment Related Day Care) who are interested in Vocational Training will be provided with an opportunity to engage in targeted Career Pathway Training at Rogue Community College or targeted final year degree completion coursework at Southern Oregon University or Oregon Tech. Training plans will be vetted for labor market and in-demand job openings. These "Scholarship and Stipend" awards will augment Pell financial aid and will help cover the cost over and above the Pell supported tuition, books, fees and other living expenses. Awards will vary based on need for each client, and will range from $1,000 to $5,000, with an average award of $2,100.

  RCC's extensive system of career pathways (CP) are 12-44 credit certificates, 1- year 44-60 credit certificates, 2-year degrees, and articulations to 4-year degrees (see link at http://www.roguecc.edu/Programs/CareerPathways/certificates.asp). The CP concept is that students complete a short-term CP certificate for entry-level skills and above. Students are encouraged to work and remain in school to achieve a next-level certificate. RCC's CP Roadmaps illustrate these college pathways with corresponding real-time labor market information at every level. Almost all certificates and associate degrees articulate to a bachelor's degree at a regional university. This pilot project would offer opportunities in the following programs of study:
  ‣ Business Assistant: Customer Service
  ‣ Business Assistant: Small Business Management
  ‣ CAD Assistant
  ‣ Computer Numerical Control Operator
  ‣ Computer Support Technician: Computer Software Specialist
  ‣ Graphic Design: Adobe Applications Technician
  ‣ Industrial Welding Technology: Welder's Helper
  ‣ Web Development: Website Assistant
  ‣ EST -- Business, Management, Marketing, and Related Support Services
  ‣ EST -- Health Aides/ Attendants / Orderlies
  ‣ EST -- Health Professions And Related Clinical Sciences
  ‣ Landscape Technician
  ‣ Limited Electrician Apprenticeship Technologies
  ‣ Retail Management

H. Addressing Benefit Cliffs

As part of the pilot project, our region will work with state-level DHS and other partners to map out and address the "Benefit Cliffs" as part of our program strategy. As part of other

legislative initiatives, changes in ERDC and TANF are anticipated to help smooth out these cliffs. The TANF Pilot Project will work with these new benefit eligibility levels and will target career skills training, job placement and job/wage progression strategies so that clients can propel themselves past these cliffs and on to true self-sufficiency.

We will seek to target ERDC slots specifically for these job/wage progressing customers so that the flow of clients from TANF to ERDC is an up and out of poverty strategy.

I. **Partnerships & Collaboration**

- The Rogue Workforce Partnership, DHS and OED (as two state agencies) will be providing significant in-kind resources in support of this project. The TANF Pilot Project is built upon this current WSO Center and DHS operational capacity. DHS, OED and RWP all contribute significantly to blend and braid funding streams, grants benefits, training investments and staff capacity to weave together integrated capacity at the WSO Centers, DHS Self-Sufficiency offices and other partner agency locations. Table 2 describes the range of partners and leveraged resources.

Table 2 – Partners and Leveraged Resources

Organization Funding Streams & Programs	Grant Benefits or Training Investments (Approximate $ Amounts / In-Kind)	Staff Providing Services (In-kind / Existing Service Capacity)
Oregon Department of Human Services TANF-JOBS, SNAP, & ERDC programs	$796 ERDC per individual per month $352 support services plus TANF per individual per month	Yes DHS Case Managers
Rogue Workforce Partnership WIOA Adult, Dislocated Worker & Youth programs	Up to $2500 per individual for On-the-Job Training	Yes WIOA funded staff at WSO Centers
Oregon Employment Department Wagner-Peyser and State Employment Department Administrative Funds (SEDAF),	Not Applicable	Yes W-P/ SEDAF funded staff at WSO Centers
Housing Partners HUD & Section 8 Housing program	$352 support services plus TANF per individual per month $1200 per individual in housing	Yes Housing Authority staff
SPAR Partners	$352 support services plus TANF per individual per month	Yes SPAR partners: On-Track, DHS-Child Welfare
Others	To be determined	To be determined

- In addition, our region is a statewide leader in weaving together a broad Southern Oregon Success "Collective Impact"[5] initiative that brings together healthcare, early learning, K-20 education, social service (including System of Care), workforce, economic development and business partners. TANF Pilot Project partners will also engage these partners in our client self-sufficiency work, and leverage partnerships and resources wherever and whenever possible.

J. Numbers Served
- 75 clients served / year
- 150 clients served total in biennium

K. Budget

July 2015 to June 2017 (2 year biennium)

Items	Amount
Personnel (wage & fringe)	
‣ Career Navigator (0.75fte x $53,000 / year)	78,750
‣ Project Manager (RWP .08fte x $9,400/year)	18,600
Overhead	8,150
Community College Scholarships / Stipends $1,000 to $5,000 awards/person x 150 clients (average $2,100 per person); augmenting Pell-funded Tuition, Books, Fees & Living Expenses	325,000
RCC Program Management	8,500
Support Services Contingency Fund	24,500
Contracted Services (OED wage record matches)	1,500
Administration (7% -- includes RWP & Svc Provider)	35,000
Total	$500,000

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[5] Stanford Social Innovation Review, Winter 2011, http://www.ssireview.org/articles/entry/collective_impact

FOR IMMEDIATE RELEASE
September 9, 2015

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Oregon Receives $3 million Grant to Boost Manufacturing Apprenticeships

Salem - The U.S. Department of Labor Employment and Training Administration (USDOL-ETA), has awarded a $3 million grant to the Oregon Employment (OED) Department to help promote apprenticeship and work-based learning opportunities.

"At a time when many of our most highly skilled manufacturing workers are retiring, this grant will help us expand apprenticeship and work-based learning. You can't beat having employers directly responsible for the programs, supported by education and social services," said OED Director Lisa Nisenfeld.

The grant is a part of $175 million in American Apprenticeship Grants awarded to 46 public-private partnerships nationwide.

Securing the grant was a collaborative effort between OED and the Oregon Bureau of Labor and Industries (BOLI) along with other partners and private sector employers. The result was the formation of a program known as Oregon-Apprenticeships in Manufacturing (Oregon-AIM).

The goal of Oregon-AIM is to build strong apprenticeship and work-based learning programs within the advanced manufacturing industry. The grant will be used to aid employer recruitment and create innovative training, including online opportunities.

In particular, the program will strive to create apprenticeship training opportunities for women, people of color, veterans, Temporary Aid to Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP) participants.

The Oregon Employment Department, along with employers Collins and Madden Industrial Craftsmen submitted the grant application. Other key partners include BOLI, 21 employers, three industry associations, the Office of Governor Kate Brown, Oregon Higher Education Coordinating Commission (HECC), Department of Community Colleges and Workforce Development (CCWD), and Department of Human Services.

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 statues, 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:_____ ADOPTION DATE:_____
              Chair, Rogue Workforce Partnership

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.

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:_____ ADOPTION DATE:_____
        Chair, Rogue Workforce Partnership

Information Brief

To: Rogue Workforce Partnership

From: Aurora King, Director of Business and Innovation

Date: September 23, 2015

Subject: Rapid Response Activities

The Regional Rapid Response Information team convened and facilitated the following Information Sessions in Jackson and Josephine Counties over the past quarter:

Rapid Response Information Sessions, PY 15					
Date	Business	County	Affected Workers	Survey Responses	Response Rate
8/7/2015	Core-Mark	Josephine	47	32	68%
8/26/2015	Oil Can Henrys	Josephine	12	4	33%
9/2/2015	Motorcycle Superstore	Jackson	70	28	40%
9/4/2015	Haggens Food and Pharmacy	Josephine	63	30	47%
	Total		192		

RWP staff will be working with WorkSource Oregon's Integrated Business Outreach team to organize a reverse job fair targeting the affected workers in the coming quarter.

Southern Oregon Success & Klamath Promise

College & Careers for All Hub

Draft Proposal for Cross-Regional CC4A Hub
Integrating STEM, CTE, CRLE
and linked to
Regional Sector Strategies

July 20, 2015

Southern Oregon Success & Klamath Promise

Are working together to create a **Cross-Regional Hub** that integrates:

- **College & Careers for All** (CC4A)
  - **Career Theme "Majors" & Industry Credentials in High School**
  - **Accelerated Learning** - *Including Dual Credit for College & Industry Credentials*
  - **Project-Based, Contextualized & Experiential Learning**
  - **STEM** - *Science, Technology, Engineering & Mathematics*
  - **CTE** - *Career-Technical Education*
  - **CRLE** - *Career Related Learning Experiences*

Strategically Linking . . .

Businesses
&
Economic Development
& Workforce Priorities /
Sector Strategies

K-20 Education,
Informal Education,
Community Outcomes &
Systems Transformation
CC4A Hub

Strategic Systems Transformation

- A Multi-Year Implementation Effort
  - With targeted outputs, outcomes & milestones along the way

- Requires Us To Work Across A Multitude Of Complex Organizational & Geographic Boundaries

- Requires a Regional Framework
  - "Tight/Loose"
  - "Coop-etition" = Cooperation + Competition

- **A Multitude of Complex Organizational & Geographic Boundaries:**
  3 to 4 Counties, 13 K-12 School Districts, 2 Community Colleges, 2 Universities, 2 Workforce Boards, Multiple Economic Development & Regional Solutions partners

- **Requires a Regional Framework**
  - "Tight/Loose"
    - Tight on common outcomes & overarching approach – e.g., Business Demand-Driven, Project-Based/Experiential Learning, etc.
    - Loose on individual organizational flexibility, independent action, grant-writing, etc.
    - Not trying to control process or decision-making; but creating a regional approach & system
  - "Coop-etition"
    - Cooperation – to create regional approach & achieve results on a regional scale so our businesses & economy have the skilled workforce needed to thrive.
    - Competition – with other state or regional grant-seekers for CTE & STEM grants

Deliverables to Businesses

Employees	6 months	12 months	18 months	24 months	Focus / Strategies
Entry Level	Solution 1a Solution 1b	• _____?	• _____?	_____?	• Work Ethics • First Job Success
Mid-Skills	• _____?	• _____?	• _____?	• Double RCC-CTE enrollment in Manufacturing & Information Tech • Double # Oregon Tech students from Jackson & Josephine Co.	• CTE focus • Manufacturing has a Future (Marketing)
High Skills	• _____?	• _____?	• _____?	_____?	• Recruit / Retain • Trailing Spouse

- Our efforts need to be driven by the demands of our region's businesses for skilled workers. Meeting the priorities of our key traded sector industries is imperative for sustaining the economic vitality of our region.

- Business leaders will continue to find alternative solutions, including selling their business to others outside the region, moving away or closing their businesses, if we don't find demonstrable ways to help address their workforce needs. We will lose jobs and our region will suffer economically.

- Businesses have immediate, short-term and long-term workforce needs.

- Waiting for long-term education solutions won't help the immediate and short-term needs of our key industries.

- What can we do to meet these immediate and short-term needs? We need to find innovative ways to fill in these blanks.

Academic & Informal Education Success Deliverables

Students	12 months	24 months	36 months	48 months	Focus / Strategies
Universities	• _____?	• Double # Oregon Tech students from Jackson & Josephine Co.	• _____?	• _____?	• Rogue Valley's Industry Focus: ‣ Advanced Manufacturing ‣ E-Commerce/IT ‣ Healthcare
Community Colleges	• + 50% RCC-CTE enrollment in Manufacturing & Information Tech • KCC _____????	• Double RCC-CTE enrollment in Manufacturing & Information Tech • KCC _____????	• _____?	• _____?	• Klamath County Industry Focus: _____????
High Schools	• 3 Teacher Externships / school	• _____?	• 80% Graduation Rate	• _____?	• Dual Credit, STEM, CTE & CRLE
Middle Schools	• _____?	• _____?	• _____?	• _____?	
Informal Education	• _____?	• _____?	• _____?	• _____?	

- What are the corollary academic success deliverables that we can align with our business demand-driven priorities?

- We need to find innovative ways to fill in these blanks.

This is the picture we've displayed before that depicts the merging of our CC4A, CRLE, CTE and STEM work into a blended and braided set of mutually reinforcing activities

A Regional Framework for Strategic Transformation

Informal Education & Community
- Youth, Parents / Adults
- STEM, CTE, CRLE Focus

K-12 Schools Transformative Enhancement
- Teaching & Learning
  - Project-Based / Contextualized & Experiential Learning
  - Teacher Industry Tours & Externships
  - STEM, CTE, CRLE Coordinator
  - Scheduling & Professional Learning Communities
- Secondary Education Experience
  - Career Themes / "Majors" & Industry Credentials
  - Accelerated Learning / Dual Credit
  - STEM, CTE, CRLE Focus
    Facilities/Labs Career Focused

Businesses

Will partner in . . .
- Industry / Education Councils
- Teacher/Counselor Industry Tours & Externships
- Student Activities in STEM, CTE, CRLE
- Sponsorships

K-20 CC4A Hub
- Transform Business / Education Partnership
- Convene, Facilitate, Research & Coordinate
  - Coordinate STEM, CTE, CRLE

Workforce Boards with Economic Development, Junior Achievement, Chambers of Commerce

Community Colleges
- Transform Link to High Schools
  - Dual Credit & Career Pathways
  - STEM, CTE, CRLE Focus + Coordinator

Universities
- Transform Link to High Schools
  - Dual Credit & Career Majors
  - STEM, CTE, CRLE Focus + Coordinator

WorkSource Oregon Centers
- Out of School Youth + Adults
- STEM, CTE, CRLE Focus
- Worksite-Based Training

- This graphic depicts a proposed Regional Framework for the Strategic Transformation work we need to undertake to dramatically improve K-20 education outcomes and create a new kind of Business / Education Partnership.
- We'll delve into some of the details in the next slides.

College & Careers for All Hub

K-20 CC4A Hub
- Convene, Facilitate, Research & Coordinate
  - Coordinate STEM, CTE, CRLE

- **Integrates STEM, CTE & CRLE Efforts**

- **Promotes Regional Model for Transformative Enhancement of:**
  - Teaching & Learning
  - Secondary Education Experience
  - Business / Education Partnership

- **Creates Conditions for Implementing Regional Model by:**
  - Getting official sanction from state as STEM Hub
  - Creating Regional Framework so we can get STEM Infrastructure Grants & other STEM & CTE Project Grants

- **Convenes, Facilitates, Researches & Coordinates**
  - Identifies capacities, goals school needs; provides resources & best practices
  - Coordinates a convocation process to accompany STEM & CTE Project Grants

Let's focus more specifically on the CC4A Hub . . .

- The CC4A Hub is one of the central components of our strategy

- It provides the infrastructure for an integrated regional approach amongst the many K-12, Higher Education and workforce partners so that they can be more easily coupled to our regional business community

- The CC4A hub would serve to achieve the essential regional tasks listed on the slide

K-12 School Transformative Enhancement

- Career Themes / "Majors" & Industry Credentials
- Accelerated Learning - Dual Credit
- STEM, CTE & CRLE Focus
  - Regional Coordination with Business
    - Oregon Connections - Web Platform
    - CRLE / CTE / STEM Regional Coordinators / Team
  - School-Based Coordinators
  - Informal Education & Community Programming
- Project-Based / Contextualized & Experiential Learning
- Facilities & Labs
- Professional Learning Communities – Contextualized, Applied, Experiential & Inter-Disciplinary

K-12 Schools Transformative Enhancement
- Teaching & Learning
- Secondary Education Experience

Key elements in K-12 School Transformative Enhancement

- **Career Themes in High Schools** - Similar to declaring a major in college; want industry credentials available for students with strong focus on critically important CTE middle-skills career pathways & jobs

- **Accelerated Learning / Dual Credit** - Need to create better academic alignment here and strong links to real career pathways

- **Integrated coordination of STEM, CTE & CRLE activities needed at regional & school-based levels**

- **A Regional CRLE / CTE / STEM Coordination Team will be needed to . . .**
  - Create Structure For Businesses To Plug Into (varies school to school), working with Rogue Workforce Partnership, Economic Development partners, Junior Achievement, Chambers of Commerce
  - Work with CRLE/STEM/CTE Point Person at each school / school district
  - Convene School Coordinators – to organize capacity, share best practices, e.g., Project-Based Learning

- **School-based Coordinators will be needed to . . .**
  - Serves as school's coordinator, gatekeeper & problem solver on CRLEs
  - CRLE / STEM / CTE logistics & coordination
  - Change agents & champions; Help Provides unifying vision at school
  - Individualize career development & experiential learning
  - Help define Senior Projects / Extended Application so relevant to Career Theme work

- **Project-Based Learning**
  - *Example*: 3 Teachers coming together- Chemistry, Algebra & Welding - to align curriculum for common students. Need support *(time, tools, guidance)* & leadership *(expectations & accountability).* Do meetings with Businesses / check-in 2 x year.
  - Start with Businesses Engaging with CTE Teachers; then can get to Chemistry, Math teachers.
  - Need Staff Development – PBL can be difficult for Teachers & Administrators to embrace
  - Need Teacher/Counselor Externships in Key Industries
  - This Impacts What Happens In The Classroom; want all students impacted – the 29 not on internships
  - Need to address questions/issue of external testing as a driver away from project-based learning

- **Facilities & Labs** - Classrooms set-up for Occupation-Oriented Learning - healthcare, welding, etc.

- **Professional Learning Communities** - Cross–Discipline & Project-Based Learning-Oriented

Informal Education

- This slide needs to be filled in by partners from ScienceWorks, College Dreams, Rogue Hack Lab and others

Create the Partnership / Critical Friends

- Business-Driven
- One single K-20 coordination point for business to plug into
- Convene Business / Community & K-20 Education Leaders
  - Private, Public & Non-Profit
- Industry / Education Councils
- Critical Friends

K-20 CC4A Hub
- Transform Business/ Education Partnership

- **Business-Driven -** is key to support our region's economic development imperatives

- **One Single K-20 Coordination Point for Businesses to Plug Into -** A plea & priority we've heard from businesses for years; they've asked to "please streamline & simplify this all into an easy for us to plug into system = Tell me what you need from me & what I can do concretely to help"

- **Convene Business / Community & K-20 Education Leaders**
  - Kick-off
  - 18-24 months of initial work
  - Process of getting both sides to understand each other's world realities- Schools, Kids, Business

- **Industry / Education Councils**
  - Build upon CTE Advisory Councils at High Schools & Community Colleges
  - Businesses meet with teachers to share, talk about: Project Based Learning, Curriculum, Ideas & Projects
  - Be one with the school
  - Meet 1X/month or less

- **Critical Friends. . .**
  - Are Honest – tell us what you're seeing (e.g., "this is taking too long," "why are you doing this?" "I don't see your principal doing _____")
  - Will persevere, stick through process, have patience & commitment
  - Here's what I need from you . . .
  - Honesty without alienation
  - Establish common goals & have clear roles

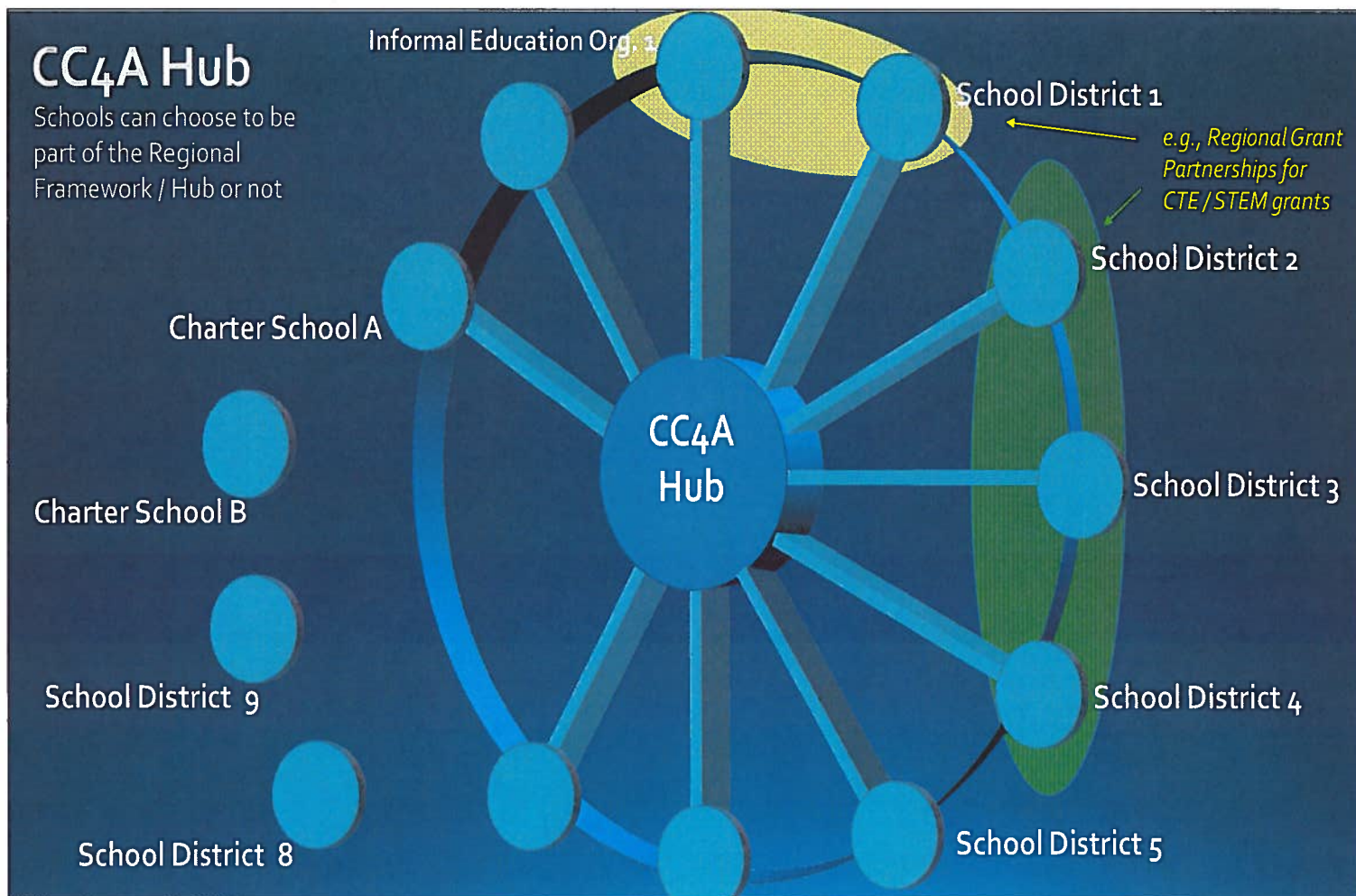# What are Your Thoughts & Questions to Move this Forward?

- _____?

- _____?

- _____?

- If not this, then what? If not us, who? If not now, when?

Proposed Next Steps

- **Present Concept to:**
  - Green Springs Group / CC4A Group
  - K-12 Superintendents
  - College & University Presidents
  - Workforce Board Business Leaders
  - Other Economic Development & Business Partners
  - Other Southern Oregon Success & Klamath Promise Partners

- **Refine & Formalize Regional Framework, CC4A Hub Governance & Craft MOU**

- **Start Preparing for Grant Applications**
  - STEM Infrastructure Grant – SOESD?, on behalf of CC4A Hub
  - STEM & CTE Project Grants – individual schools, with regional affirmation from a CC4A Hub Business Leaders / Regional Sub-Group;
    - Build in Regional & School-Based Hub Coordinator/Gatekeeper into these project grants?

- **Develop Implementation Plan & Timeline**

CC4A Hub

Schools can choose to be part of the Regional Framework / Hub or not

Informal Education Org. 1

School District 1

e.g., Regional Grant Partnerships for CTE / STEM grants

School District 2

Charter School A

School District 3

Charter School B

CC4A Hub

School District 4

School District 9

School District 8

School District 5

- **CC4A Hub would be optional -** schools and other partners could join or not

- **Would Promote Partnering Together in Grant Applications –** Some schools/partners may choose to collaborate to create and share greater regional capacity in STEM and/or CTE project grants; something businesses want to see so we have sustained and growing regional impact

- **Why schools will want to join?**

  ‣ Being part of a regional collaborative that links up K-20 education, workforce, economic development and businesses to improve academic outcomes and grow our regional economies

  ‣ Businesses want a "One-Stop" regional approach and the CC4a Hub will provide this; Businesses are overwhelmed & tired of too many different individual contacts from too many K-20 education & workforce organizations

  ‣ The Hub will provide schools access to more business partnership, and students will have more opportunities for better career exploration and CRLE matches

  ‣ The Hub will provide a streamlined process and platform process for linking schools to regional businesses - especially key traded sector/STEM & CTE oriented industries with high-demand/high-wage career pathways
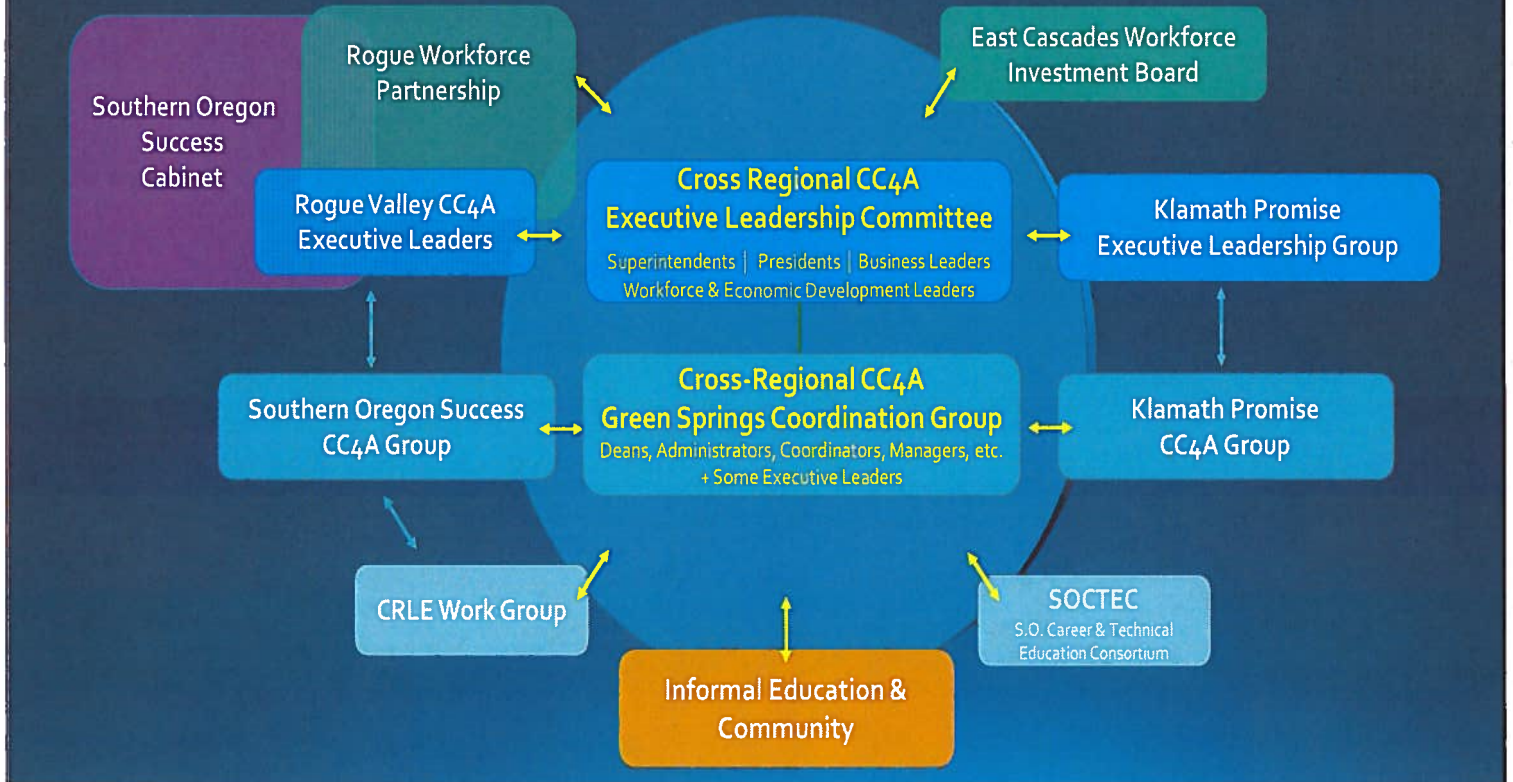
CC4A Hub Details
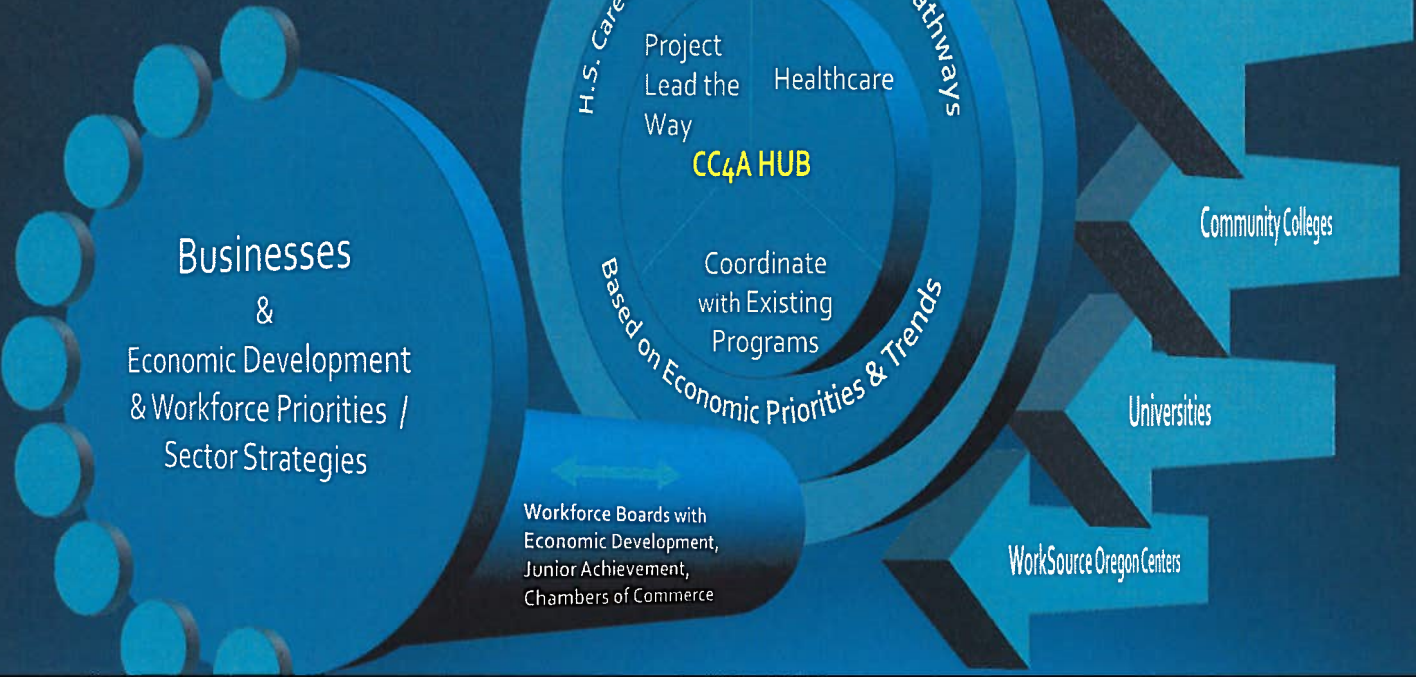
CC4A Hub Governance

- Definitely a work in progress; many questions and details on how exactly it would work still need to be fleshed out

- Have to figure out the link, e.g., meeting configuration & logistics, to:
    - The Larger Southern Oregon Success and Klamath Promise efforts
    - The Workforce Boards in each region

FOR IMMEDIATE RELEASE: September 15, 2015

PRESS CONFERENCE PRESENTER:
Nick Beleiciks, State Employment Economist

CONTACT INFORMATION:
David Cooke, Economist (503) 947-1272

Oregon's Annual Job Growth Reaches 10-Year High

Oregon's payroll employment continues to grow rapidly, adding 4,400 jobs in August, following a revised gain of 7,400 in July. In August, two major industries accounted for most of the gains, as **leisure and hospitality** added 2,100 and **government** added 1,600. The other 12 major industries performed close to their normal seasonal patterns.

Over the past 12 months, Oregon's payroll employment has expanded by 60,400 jobs, or 3.5 percent. This is the state's fastest job growth rate since February 2005. In terms of total jobs added during a 12-month period, the last time Oregon added more than 60,000 jobs was toward the end of the high-tech boom, when during the 12 months ending in May 1997, Oregon added 61,500 jobs.

Job gains over the past 12 months were widespread among the industries as nearly all of the major industries grew by between 3 percent and 5 percent. The fastest growing industries each rose by close to 5 percent: **leisure and hospitality** (+9,400 jobs, or 5.1%); **retail trade** (+9,700 jobs, or 4.9%); and **transportation, warehousing, and utilities** (+2,700 jobs, or 4.8%). Other key industries also grew rapidly over the year including **manufacturing** (+5,800 jobs, or 3.2%) and **construction** (+3,000 jobs, or 3.8%). None of the major industries cut jobs substantially during the period, but **financial activities** and **mining and logging** each were essentially flat.

Despite strong payroll job gains in recent months, Oregon's unemployment rate edged up to 6.1 percent in August from 5.9 percent in July. However, the unemployment rate continues to be lower than last year, when in August 2014 it was 6.9 percent.

Next Press Releases
The Oregon Employment Department plans to release the August county and metropolitan area unemployment rates on Tuesday, September 22nd, and the statewide unemployment rate and employment survey data for September on Tuesday, October 13th.

Oregon Unemployment Rate, Seasonally Adjusted

Oregon Nonfarm Payroll Employment, Seasonally Adjusted
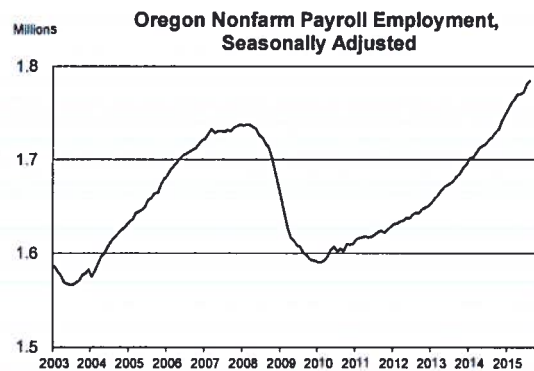
**Seasonal Expectations and
Over-the-Month Employment Changes
July to August 2015**

INDUSTRY	Normal Seasonal Movement	Unadjusted Change	Seasonally Adjusted Change
Total nonfarm payroll employment	1,200	5,600	4,400
Total private	3,400	6,200	2,800
Mining and logging	100	0	-100
Construction	1,300	700	-600
Manufacturing	1,500	1,200	-300
Wholesale trade	200	0	-200
Retail trade	500	1,000	500
Transportation, warehousing and utilities	0	500	500
Information	0	400	400
Financial activities	100	100	0
Professional and business services	0	100	100
Private educational services	100	600	500
Health care and social assistance	800	800	0
Leisure and hospitality	-1,200	900	2,100
Other services	0	-100	-100
Government	-2,200	-600	1,600

Oregon Seasonally Adjusted Employment
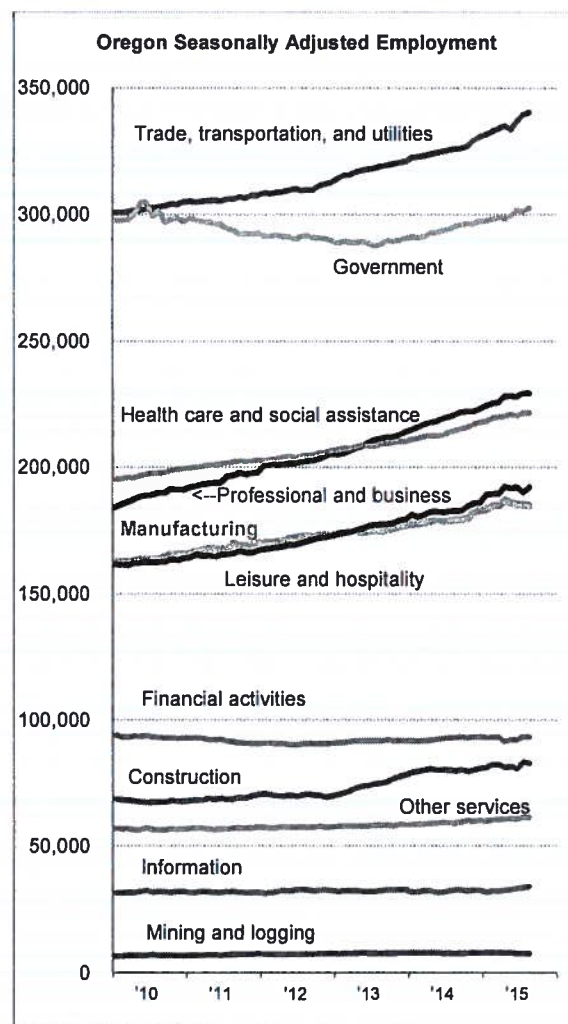
Notes:
All numbers in the above narrative are seasonally adjusted.

The Oregon Employment Department and the U.S. Bureau of Labor Statistics (BLS) work cooperatively to develop and publish monthly Oregon payroll employment and labor force data. The estimates of monthly job gains and losses are based on a survey of businesses. The estimates of unemployment are based on a survey of households and other sources.

The Oregon Employment Department publishes payroll employment estimates that are revised quarterly by using employment counts from employer unemployment insurance tax records. All department publications use this *official Oregon series* data unless noted otherwise. This month's release incorporates the January, February and March 2015 tax records data. The department continues to make the original nonfarm payroll employment series available; these data are produced by the BLS.

The pdf version of the news release, including tables and graphs, can be found at www.QualityInfo.org/press-release. To obtain the data in other formats such as in Excel, visit www.QualityInfo.org, then within the top banner, select *Economic Data*, then choose *LAUS* or *CES*. To request the press release as a Word document, contact the person shown at the top of this press release.

For help finding jobs and training resources, visit one of the state's WorkSource Oregon Centers or go to: www.WorkSourceOregon.org.

Equal Opportunity program — auxiliary aids and services available upon request to individuals with disabilities. Contact: (503) 947-1794. For the Deaf and Hard of Hearing population, call 711 Telecommunications Relay Services.

Oregon Current Labor Force and Industry Employment

	August 2015	July 2015	August 2014	Change From July 2015	Change From August 2014
Labor Force Status					
Civilian labor force	1,961,353	1,957,689	1,968,689	3,664	-7,336
Unemployed	116,156	122,998	135,770	-6,842	-19,614
Unemployment rate	5.9	6.3	6.9	-0.4	-1.0
Unemployment rate, seasonally adjusted	6.1	5.9	6.9	0.2	-0.8
Employed	1,845,197	1,834,691	1,832,919	10,506	12,278
Other Labor Force Indicators					
Labor force participation rate, seasonally adjusted	60.3	60.2	61.4	0.1	-1.1
Labor underutilization rate – U-6, seasonally adjusted	12.5	12.3	13.9	0.2	-1.4
Nonfarm Payroll Employment					
Total nonfarm payroll employment	1,780,600	1,775,000	1,721,200	5,600	59,400
Total private	1,500,600	1,494,400	1,450,300	6,200	50,300
Mining and logging	7,900	7,900	8,100	0	-200
Logging	6,300	6,300	6,400	0	-100
Construction	86,900	86,200	84,600	700	2,300
Construction of buildings	23,300	22,800	21,300	500	2,000
Residential building construction	13,200	13,100	12,100	100	1,100
Nonresidential building construction	10,100	9,700	9,200	400	900
Heavy and civil engineering construction	10,200	9,800	9,800	400	400
Specialty trade contractors	53,400	53,600	53,500	-200	-100
Building foundation and exterior contractors	10,900	10,600	9,700	300	1,200
Building equipment contractors	22,000	22,100	23,900	-100	-1,900
Building finishing contractors	12,400	12,900	12,500	-500	-100
Other specialty trade contractors	8,100	8,000	7,400	100	700
Manufacturing	189,800	188,600	183,700	1,200	6,100
Durable goods	132,300	131,700	127,300	600	5,000
Wood product manufacturing	22,900	22,800	22,200	100	700
Sawmills and wood preservation	6,700	6,700	6,500	0	200
Plywood and engineered wood product mfg.	8,500	8,500	8,200	0	300
Other wood product manufacturing	7,700	7,600	7,500	100	200
Primary metal manufacturing	8,500	8,400	8,300	100	200
Fabricated metal product manufacturing	16,300	16,300	15,500	0	800
Machinery manufacturing	12,400	12,400	12,400	0	0
Computer and electronic product manufacturing	38,100	37,600	36,800	500	1,300
Semiconductor and electronic component mfg.	29,700	29,200	28,200	500	1,500
Electronic instrument manufacturing	5,200	5,200	5,300	0	-100
Transportation equipment manufacturing	12,800	12,600	11,500	200	1,300
Nondurable goods	57,500	56,900	56,400	600	1,100
Food manufacturing	29,200	28,800	29,500	400	-300
Fruit and vegetable preserving and specialty	12,600	12,000	12,400	600	200
Paper manufacturing	4,400	4,500	4,500	-100	-100
Trade, transportation, and utilities	340,900	339,400	328,000	1,500	12,900
Wholesale trade	74,900	74,900	72,900	0	2,000
Merchant wholesalers, durable goods	33,000	32,800	33,000	200	0
Merchant wholesalers, nondurable goods	27,800	28,200	26,300	-400	1,500
Electronic markets and agents and brokers	14,100	13,900	13,600	200	500
Retail trade	206,100	205,100	198,600	1,000	7,500
Motor vehicle and parts dealers	25,400	25,200	24,200	200	1,200
Building material and garden supply stores	16,100	16,300	15,200	-200	900
Food and beverage stores	43,600	43,100	41,400	500	2,200
Clothing and clothing accessories stores	16,700	16,800	16,700	-100	0
Sporting goods, hobby, book and music stores	10,200	10,300	10,300	-100	-100
General merchandise stores	42,000	41,700	41,400	300	600
Miscellaneous store retailers	11,000	10,900	10,600	100	400
Nonstore retailers	7,100	6,700	6,600	400	500

	August 2015	July 2015	August 2014	Change From July 2015	Change From August 2014
Transportation, warehousing, and utilities	59,900	59,400	56,500	500	3,400
Utilities	4,500	4,500	4,600	0	-100
Transportation and warehousing	55,400	54,900	51,900	500	3,500
Truck transportation	18,900	18,700	18,800	200	100
Couriers and messengers	8,300	8,200	6,700	100	1,600
Warehousing and storage	7,300	7,300	7,000	0	300
Information	33,900	33,500	32,500	400	1,400
Publishing industries, except internet	14,400	14,400	14,200	0	200
Newspaper, book, and directory publishers	3,900	3,900	4,100	0	-200
Software publishers	10,500	10,500	10,100	0	400
Telecommunications	6,200	6,200	6,100	0	100
Financial activities	93,400	93,300	94,200	100	-800
Finance and insurance	55,900	56,100	56,300	-200	-400
Credit intermediation and related activities	26,100	26,100	26,500	0	-400
Insurance carriers and related activities	24,400	24,400	24,300	0	100
Real estate and rental and leasing	37,500	37,200	37,900	300	-400
Real estate	32,700	32,400	32,600	300	100
Professional and business services	232,000	231,900	225,200	100	6,800
Professional and technical services	88,700	88,000	84,700	700	4,000
Legal services	11,400	11,600	11,800	-200	-400
Architectural and engineering services	14,100	14,200	13,500	-100	600
Computer systems design and related services	14,700	14,800	14,500	-100	200
Management of companies and enterprises	43,200	43,100	40,800	100	2,400
Administrative and waste services	100,100	100,800	99,700	-700	400
Administrative and support services	95,300	96,100	94,500	-800	800
Employment services	40,800	42,000	41,300	-1,200	-500
Business support services	15,300	15,300	15,200	0	100
Services to buildings and dwellings	23,000	22,800	22,000	200	1,000
Educational and health services	251,500	250,100	241,600	1,400	9,900
Educational services	31,100	30,500	27,800	600	3,300
Health care and social assistance	220,400	219,600	213,800	800	6,600
Ambulatory health care services	82,200	82,000	79,300	200	2,900
Hospitals	55,800	55,600	53,700	200	2,100
Nursing and residential care facilities	48,600	48,000	47,200	600	1,400
Social assistance	33,800	34,000	33,600	-200	200
Leisure and hospitality	203,600	202,700	192,800	900	10,800
Arts, entertainment, and recreation	25,600	26,400	25,500	-800	100
Amusement, gambling, and recreation	18,800	19,400	18,800	-600	0
Accommodation and food services	178,000	176,300	167,300	1,700	10,700
Accommodation	26,800	26,600	25,500	200	1,300
Food services and drinking places	151,200	149,700	141,800	1,500	9,400
Full-service restaurants	72,100	70,800	67,700	1,300	4,400
Limited-service eating places	62,300	62,700	60,400	-400	1,900
Other services	60,700	60,800	59,600	-100	1,100
Repair and maintenance	17,500	17,500	16,800	0	700
Personal and laundry services	14,100	14,300	13,900	-200	200
Membership associations and organizations	29,100	29,000	28,900	100	200
Religious organizations	16,000	15,700	15,800	300	200
Government	280,000	280,600	270,900	-600	9,100
Federal government	29,400	29,500	28,600	-100	800
State government	83,400	83,600	79,700	-200	3,700
State education	27,700	28,000	27,100	-300	600
Local government	167,200	167,500	162,600	-300	4,600
Indian tribal	8,400	8,400	8,700	0	-300
Local education	75,100	75,600	73,500	-500	1,600
Labor-management disputes	0	0	0	0	0

The most recent month is preliminary, the prior month is revised. Prepared in cooperation with the U.S. Department of Labor, Bureau of Labor Statistics.

Labor Force Status: Civilian labor force includes employed and unemployed individuals 16 years and older by place of residence. Employed includes nonfarm payroll employment, self-employed, unpaid family workers, domestics, agriculture and labor disputants. Unemployment rate is calculated by dividing unemployed by civilian labor force.

U-6 is the total unemployed plus all persons marginally attached to the labor force plus total employed part-time for economic reasons, as a percent of the civilian labor force plus all persons marginally attached to the labor force.

Nonfarm Payroll Employment: Data are by place of work and cover full- and part-time employees who worked or received pay for the pay period that includes the 12th of the month. The data exclude the self-employed, volunteers, unpaid family workers, and domestics. These survey-based estimates are revised quarterly, based on more complete information from employer tax records.

Mail Tribune

By Greg Stiles
Mail Tribune

September 13. 2015 12:01AM

Haves, have-nots in Jackson County further apart than ever

The divide between the haves and have-nots is growing wider, threatening the long-term economic vitality of Jackson County and Oregon as a whole, a new study shows.

Top earners in Jackson County are making 13 times more than the lowest wage earners, a figure that's been steadily rising in the past 10 years. Elite earners receive $1.63 to every $1 received by the county's working poor, the study says.

"We are at a critical point in our economic history where inequality is recognized as a problem," says Bruce Weber, director of Oregon State University's Rural Studies Program, which conducted the study. "People who have money and people who don't are both seeing it as a problem. Undoubtedly it's true for Jackson County, and true for most of the state and most of the country."

Steve Ryan, 33, an information technology support analyst at Asante, owns his home in Medford, participates in his employer's 6 percent match retirement savings account plan and uses an Acorn app to invest "spare change" into mutual funds. Mail Tribune / Jamie Lusch

"Tracking Oregon's Progress: A Focus on Income Inequality," funded by the Oregon Community Foundation and released in June, shows the highest earning 20 percent of all Oregonians are making nearly 14 times the income of the lowest earning 20 percent.

Oregon has consistently ranked No. 22 out of 50 states and the District of Columbia for its level of income equality since the mid-2000s, the report states. California, New Mexico, Arizona and Colorado all have a higher level of income inequality in the West.

"It erodes the vitality of a place," Weber said. "Because people at the low end can't spend and can't generate the income needed and people at the high end don't tend to spend as high of a share of their income. That's why we haven't come out of the recession in this state."

To simplify, while one person may have the ability to buy five cars from five dealers in one day, another may not be able to scrape together enough for a down payment for much needed transportation.

"People on the lower end don't have money to spend on goods and services," Weber said. "That's why it's not just an individual problem, it's a larger economic problem for the area. An economy has a certain amount of money spent on local retail, construction and buying new cars. If that money is unequally distributed, people at the top aren't going to buy as much as they can, because they tend to save more than people in general."

He adds they often tend to invest their money outside the local economy, too.

"Inequality is mostly driven by capital," Weber said. "There are huge differences in wage earnings, of course, but it's really about the distribution of asset earnings, which is much higher. Land used to be the big one. In "Downton Abbey" (the popular PBS show about life of the English aristocracy), the difference is between people living in the manor and those living outside. Those living in the manor owned land and the others didn't. Now it's financial assets."

Figures comparing net worth by state and county aren't tracked by federal agencies, but the U.S. Census shows only 2 percent of Jackson County households earn more than $200,000 in annual income, while more than a quarter — 28.2 percent — live in a lower middle class household earning between $25,000 and $50,000. About 27.4 percent earn less than $25,000.

Weber said income inequality was created by industrialization in the 19th century, checked by legislation a century ago, then was compressed by the Great Depression and World War II.

"Those events resulted in huge equalization of income distribution," Weber said. "Inequality went down in the 1940s and into the 1960s. It didn't surface again until the 1970s, and then took off in the 1980s on a trajectory that hasn't stopped."

Jackson County workers stood toe-to-toe with their Willamette Valley counterparts in the '70s and '80s, thanks to high-paying timber industry jobs.

"The wages here in 1976 exceeded the statewide average," said Guy Tauer, a regional economist for the Oregon Employment Department. "Since then, there has been a change between our average wage versus the statewide average, and we've seen how the gap has grown over time."

Manufacturing, often timber-related jobs, comprised a higher percentage of overall employment in the mid-1970s. Since then, service jobs in retail and hospitality have played an increasing role.

"They don't typically pay as well and this has helped increase the gap," Tauer said.

After the resource-based timber products jobs began drying up in the 1990s, most of Oregon outside of the Portland metropolitan area struggled to replace those incomes, said Tim Duy, director of the Oregon Economic Forum at the University of Oregon.

"When timber jobs dried up, they didn't get replaced with equivalent jobs for people in that skill set," he said.

That led to the rise of what Duy calls a polarization of jobs.

"There are jobs with routine skills and jobs with cognitive skills," he said. "Things that are routine can be basically replaced by technology. We've certainly seen workers hurt, who were relying on those kinds of routine skills jobs."

Duy further divides cognitive skill jobs into routine cognitive and non-routine cognitive categories. Accounting and bookkeeping are the routine cognitive sphere.

"Those are in decline as well," he said.

"The non-routine cognitive jobs that change a lot and you have to think about are where the income gains are coming from," Duy said.

These would include the health care industry, which joins retail as major sectors in which jobs have increased in Jackson County, thanks to the growing number of Californians retiring in Southern Oregon.

Health care and retail demonstrate the wide divide in income equality in Southern Oregon. In 2014, government figures show the average annual wage, including managers, in the retail industry was $28,244. For health care workers — including those in doctor, dentist, physical therapist and optometrist offices — the average annual wage was $58,511.

Ways to shrink the divide between the haves and have-nots are harder to come by than once thought, analysts say.

"There are a lot of dimensions, and I'm not sure there are a lot of good answers of what to do about it," Duy said.

Education, the old standby, is no longer a guarantor of increased income and wealth, he said.

"There's been some discussion that it's not enough to make significant changes in wealth gaps," he said.

There are fewer opportunities for someone to graduate from high school and step into a family-wage job, Tauer said.

"The educational requirements are higher and there is more efficiency within production type of jobs," he said. "It doesn't take as many hands to do the same work as it did 30 years ago. Mills are more efficient with equipment and can make more product with less human labor."

Runaway higher education costs and the corresponding debt load make it difficult to simply push for more education, he said. The increasing burden of student debt, calculated nationally above the $1 trillion mark, is evident in wealth inequality discussions. It's also a factor as young people move out of school into the workforce.

"When I finished getting my bachelor's degree, I thought my $5,000 student loan was a pretty heavy debt load," Tauer said.

"That's hardly a term any more. It makes it more of a barrier for folks without financial means or family support to be able to pursue an education, which certainly correlates to income and lifetime earnings."

Still, those with determination and a handle on their own spending can increase their wealth, even if it's in relatively small increments over time.

Take Steve Ryan, a 33-year-old information technology support analyst at Asante Health System. Without making a quantum shift in earnings or social strata, Ryan is carving out a better existence than a decade ago, putting his experience to use in a field where there is always a need.

Ryan said he's held a variety of tech-related jobs. But his present endeavor has provided both current income and a chance to retire down the road.

"I'm making more now than any other period in my life," Ryan said, noting his base pay is boosted about 30 percent because he works nights and weekends.

Ryan is frugal and participates to the full extent of his employer's 6-percent-match retirement savings account plan. He uses an Acorn app to invest "spare change" into mutual funds.

"It's free and links to my bank, so when I spend $1.50, it invests 50 cents on my behalf," he said. "I've also begun exploring buying stocks via eTrade and also the Motiff app, a bit of a different approach to investing in stocks. I also have a (health savings account) that rolls over each year that is pre-tax just like my retirement account.

"These things combined, in addition to owning a house, have helped me lower my tax bracket, save money for retirement, live debt-free outside my mortgage and enjoy a good life."

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2014 mean hourly, highestInternist: $124.03Dentist: $115.02OB/GYN: $105.80Physician/surgeon: $99.53Family/general practitioner: $89.61 2014 mean hourly wage, lowestDining room/cafeteria attendant: $9.47Amusement/recreation worker: $9.70Fast food cook: $9.75Restaurant host/hostess: $9.81Food prep/service workers: $9.81Counter attendant: $9.99Dishwasher: $10.10

Print Page

Penn psychologist
Angela Duckworth Gr'06
argues that character—
not intelligence, quality of
instruction, family situation,
or income level—is the
crucial determinant of
achievement in school.
Now she just has to figure out
how to measure character—
and influence it
for the better.

BY KEVIN HARTNETT

CHARACTER'S CONTENT

Every year large percentages of American elementary-school students fail to learn basic math skills like how to add fractions with unlike denominators. The situation is even worse among students from the poorest American neighborhoods, despite the fact that from fourth grade on their teachers drill them in these simple steps: find a common denominator; add the numerators; reduce.

There are many explanations for why such a simple procedure proves to be so hard to convey. Reformers and policymakers point to subpar teachers and inadequate principals; to single-parenthood and other demographic drags; to health, nutrition, and the intangible handicaps of poverty.

Assistant Professor of Psychology Angela Duckworth Gr'06 has another explanation. Before she entered graduate school at Penn in 2002 she spent five years teaching math and science in poor urban neighborhoods across the United States. In that time she concluded that the failure of students to acquire basic skills was not attributable to the difficulty of the material, or to a lack of intelligence, or indeed to any of the factors mentioned above. Her intuition told her that the real problem was character.

"Underachievement among American youth is often blamed on inadequate teachers, boring textbooks, and large class sizes," she wrote in a paper titled "Self-Discipline Outdoes IQ in Predicting Academic Performance in Adolescents," which served as her first-year graduate thesis and was published in *Psychological Science* in 2005. "We suggest another reason for students falling short of their intellectual potential: their failure to exercise self-discipline ... We believe that many of America's children have trouble making choices that require them to sacrifice short-term pleasure for long-term gain, and that programs that build self-discipline may be the royal road to building academic achievement."

Effortful practice; persistence though boredom and frustration; gritty determination in pursuit of a long-term goal. In Duckworth's view these are the qualities that separate more and less successful students, and in recent years she's emerged as one of the most influential voices in American education reform, where she argues that cultivating "achievement character" in kids may be the last, best way to narrow educational inequality in America.

"Schoolwork is not hard in the way that electromagnetism is hard. It is hard because it's aversive and not fun to do," Duckworth, who joined the faculty at Penn in 2007, explains. "So the straightforwardness of the material combined with the abject failure of students to learn it made me think there must be something besides IQ holding them back. That's maybe more obvious for teachers than it is for policymakers."

The intuitive appeal and expansive application of Duckworth's research has earned her increasing popular recognition (a *New Yorker* profile is in the works) as well as a privileged position at the crossroads of basic research and public policy. This past fall U.S. Secretary of Education Arne Duncan invited Duckworth down to Washington to share her policy recommendations. There she cautioned Duncan about the usefulness of standardized tests as an accountability tool, arguing that performance on those tests tends to be more a function of native intelligence (IQ) than of how well students are actually learning in their classrooms. She also urged Duncan to throw the full weight of the Department of Education behind initiatives to use "the hard-fought insights of psychological science" to improve the way schools teach students.

Duckworth's experience as a classroom teacher has also helped her build strong ties in the education reform community, where leaders like Dave Levin, the co-founder of the KIPP (Knowledge is Power Program) charter-school network, consider her a kindred spirit and are using her work to develop strategies for teaching achievement character to low-income kids. Duckworth is best known for the study of "grit," which she defines as "perseverance and passion for

Charter-school networks like the Knowledge is Power Program (KIPP) have embraced Duckworth's work.

long-term goals." Today grit is a buzzword in the hallways of charter schools around the country, where teachers, principals, and deep-pocketed board members have all come to believe that inculcating grittiness in students is every bit as important as building academic skills.

Duckworth's view, if correct, would have dramatic implications for the way policymakers and educators think about student achievement. It also raises provocative questions about the limits of research in the social sciences and the malleability of human character: Is it possible to design measurements to quantify character with the same precision that researchers quantify intelligence? And if so, are self-control and persistence amenable to cultivation, let alone on the scale of public policy?

Angela Lee Duckworth grew up in Cherry Hill, New Jersey, the daughter of well-educated parents who'd immigrated from China. She's quick to say her mom and dad were not Tiger Parents, though academic success was always assumed. What was less expected of her, she says, was that she'd throw herself into community service. "When I was in high school I was sort of spontaneously and not very reflectively drawn to public service activities," she says. "I don't know where that impulse came from. You could do some retrospective reconstruction, but that is always a dangerous game to play."

When Duckworth was 18 she went to Harvard, where she majored in neurobiology but continued to perplex her father (who is a color chemist at DuPont) by devoting much of her time to leadership roles in several community service orga-

nizations. "I don't think in Chinese culture there is as much of a tradition of helping anonymous strangers of a different race," she says. "My dad was like, 'You have a science degree from Harvard but instead you want to spend your time helping poor black kids?'"

Following graduation Duckworth spent two years founding a summer program for disadvantaged kids and then went to Oxford on a Marshall Scholarship. After returning from Oxford she consulted with McKinsey for a year and spent another year as the chief operating officer of a web startup called Great Schools that allows parents to compare public schools. But the bulk of her time over the next seven years was spent teaching math and science at public schools in New York, San Francisco, and Philadelphia.

"It seemed to me that if I was going to work on issues of equity I should start earlier in the life course rather than later," she says, explaining why she was drawn to the classroom. "The earlier you start the bigger bang for your buck you get in terms of closing the gap between the privileged and the non-privileged. I also just enjoyed working with young people, so that kind of led naturally to teaching."

Duckworth jokes that the job-hopping she did in her twenties was a case study in "how not to be gritty," but it seems more a function of the intensity and dynamism of her personality. In the course of reporting this article I heard colleagues call Duckworth the most extroverted person, the quickest learner, and the fastest thinker (and talker) they'd ever met.

On the day I visited she had a half-dozen bubble gum containers on her desk, suggesting an atmosphere of restless activity and a need to replenish the saliva that's lost through such rapid-fire speech. She also uses expletives in a way that might impress even high-powered cursers like Rahm Emanuel. In the course of a 90-minute conversation she called a principal she knew "an asshole," described the opinion of a leading education foundation as "fucking idiotic," and did a spot-on impression of a teenager with attitude when explaining the challenge of conducting experiments with adolescents: "When you pay adults they always work harder but sometimes in schools when I've done experiments with monetary incentives there's this like adolescent 'fuck you' response. They'll be like 'Oh, you really want me to do well on this test? Fuck you, I'm going to do exactly the opposite.'"

Duckworth also has a degree of entrepreneurial energy that, at first blush, makes her an odd fit for the academy. I asked her whether she sees herself more as a reformer, like Dave Levin, the KIPP founder—driven by the desire to achieve specific outcomes—or as a scientist—dedicated to asking questions and following prescribed methods for answering them.

"I think that Dave and I have always had this passionate commitment to children combined with an incredible amount of energy and optimism about doing," Duckworth says. "My dad used to say to me, 'There are thinkers and there are doers.' Very few people are both. And I think to the extent that I'm a professor I'm a thinker and it's my duty to analyze things and see if I can figure out how the world works. But Dave and I are both very much doers. We share a kind of boldness, an attitude of just try it, just do it, and don't just sit on your hands and think all day."

For most of her time as a teacher she assumed she'd apply her insights about student achievement by opening her own charter school, which would have allowed her to stay in public education while also giving her significant discretion over exactly how and what students were taught. But after five years in the classroom, ending in a stint teaching high school science at Mastery Charter in West Philadelphia, she concluded that charter schools were not the answer to the achievement gap.

"I looked around at these charter schools and it seemed to me intuitively they weren't the way to reform education," she says. "I saw these charter schools writing their own curricula, creating their own HR departments, and it seemed to me intuitively that the diseconomies of scale were working against them." (Today she says her critique was wrong, owing to "a lack of imagination" when it came to foreseeing the development of national charter organizations like KIPP and Mastery, which provide their network schools with the efficiencies of scale that early charters lacked.)

Duckworth wasn't going to open her own school, but she still wanted to make a bigger impact on public education than she could as a teacher—at first, she just didn't know how. "I thought about the biggest problem that needs to be solved in K-12 education and then I listed out all the things I'm good at: I like to write, I like analysis, I like math, I like to think hard about problems," she says. "So I sort of put the Venn diagrams together and in a very top-down deductive way I concluded I should go into psychology and become a researcher in order to understand these character competencies, and then go back into these schools and help them solve their achievement problems."

One night in July 2002 Duckworth was up late with her infant daughter (she and her husband, the president of a Philadelphia-area real-estate investment fund, now have two girls), and researching psychology programs online when she came across the website of Martin Seligman Gr'67, the Zellerbach Family Professor of Psychology and director of Penn's Positive Psychology Center (not to mention the founder of the discipline). Duckworth, who'd never taken a psychology class before, was such a neophyte in the field that she didn't recognize Seligman's name. "I didn't know he was famous. I was like, he writes very well, I like his website, so I emailed him," she says.

As it happened, Seligman was up late too, playing bridge online ["Passion Play," Mar|Apr 2011]. He replied to Duckworth's email within minutes, inviting her to attend a research meeting at his house the next day—and ended up being so bowled over by Duckworth's super-charged demeanor that he would ultimately convince his colleagues to throw the admissions timeline out the window and allow Duckworth to join the program that September. All things considered, it wasn't a hard sell. "Angela was fast, about as fast mentally as it is possible for a human being to be," Seligman writes in his latest book, *Flourish: A Visionary Understanding of Happiness and Well-being*. "She blew us away in the interview. In violation of precedent, the admissions committee gave in and accepted her."

For her part, Duckworth was drawn to the Positive Psychology Center because of the way it encourages students to think about the real-world implications of their research. "Marty is only interested in questions with significant relevance to people's well being," Duckworth says. "Marty is a basic scien-

tist, of course, but he's always been someone with one foot in the world beyond the lab. He's always cared about how psychology actually changes people's lives within his lifetime for the better. I came in to graduate school very much in that view, and it only got reinforced while I was there."

Achievement—the main focus of Duckworth's research—is the last of the five key elements in positive psychology's taxonomy of well-being, which goes by the acronym PERMA. (The others are Positive Emotion, Engagement, Relationships, and Meaning.) For decades psychologists studying achievement focused almost exclusively on intelligence. As Duckworth saw it the problem with this single-minded emphasis was two-fold. For one, IQ scores didn't explain everything about why some individuals achieve more than others. In fact, they were not even particularly good at predicting something as basic as the amount of education adolescent-aged kids would go on to attain later in life.

The second problem was more practical: IQ may be easy to measure, but it's hard to change. IQ tests given as early as kindergarten are highly predictive of adult intelligence, meaning that if boosting intelligence was the only way to boost academic achievement, reformers were not going to get far.

The story was very different with personality. While IQ stabilizes before kids even learn to read, many psychologists including Duckworth point to longitudinal survey data to conclude that personality doesn't become similarly fixed until at least age 50. Along the way average levels of personality traits change (most people become more conscientious as they grow older), as do rank-order levels, meaning that the most conscientious 10-year-olds are not necessarily the most conscientious adults four decades later. To Duckworth, this fluidity suggested a tantalizing possibility: If personality evolves so much as people get older, why shouldn't schools be able to influence the direction in which it changes?

Before Duckworth can hope to modify personality she needs to know how to measure it, which is no small task. In fact, according to Seligman, measurement challenges are the primary reason that researchers have long shied away from studying personality.

"There's a hegemony of silence in science, things you don't work on because they are too fuzzy," Seligman says. "So, while the importance of self-control, self-discipline, grit may be obvious once we've said it, that doesn't mean that they become eligible as scientific endeavors until a creative person like Angela comes along and says, 'Oh come on, we can measure these things!'"

Duckworth is naturally optimistic about the potential for human ingenuity to solve social problems. She likes to say, "Rather than curse the darkness, light a candle," but in her very first research project as a graduate student at the PPC the darkness won. Her years in the classroom had convinced her that persistence was essential for academic achievement, so she designed a study in which students were asked to find a pattern in what was (unknown to them) a series of non-repeating digits. The problem, though, was that no one gave up within the allotted time. "I found, as has been found by many psychologists, that any good lab experiment has to end within 60 minutes," Duckworth says. "But I couldn't find a task that was so frustrating that people would give up within that time."

After failing to measure persistence Duckworth shifted to self-control, which researchers had been studying since 1972 when the eminent psychologist Walter Mischel conducted his famous "marshmallow test." Mischel presented pre-kindergarteners with a marshmallow but told them they could have two if they waited 15 minutes to eat the first. In a conclusion that hovers over middle-class parenting across America, Mischel found that kids who were able to hold out for the second marshmallow tended to have higher SAT scores years later.

Duckworth conducted her own version of Mischel's experiment with students at the Julia R. Masterman Laboratory and Demonstration School, Philadelphia's top magnet school, and drew on additional measurement techniques to make her results more robust. In the fall of 2002 she offered 140 eighth graders a choice between receiving $1 immediately or $2 a week later, and also administered self-control questionnaires to the students, their parents, and their teachers. She combined her survey and experimental data to create a "self-control index," which she used to anticipate how well students would fare on their final report cards. When grades came out that spring she found that self-control and GPA were not only strongly correlated—her self-control index was twice as good at predicting academic performance as IQ scores.

Following the Masterman study, Duckworth turned to what has become her signature topic—grit. *Grit* is a nebulous concept compared to self-control, and the way people pursue long-term goals is hard to measure experimentally. So instead of a lab task Duckworth developed the "Grit Scale," a 12-item questionnaire that asks respondents to rate themselves on statements like "Setbacks don't discourage me" and "I have difficulty maintaining my focus on projects that take more than a few months to complete."

Duckworth wanted to test the Grit Scale in high-achieving populations, to see if it could reveal distinctions even within groups where everyone was talented. In 2004 she administered the Grit Scale to 1,200 incoming cadets at West Point, just before they began "Beast Barracks," the academy's intensive summer training program that every year leads 5 percent of admitted freshmen to drop out.

Admission to West Point is determined in large part by a "Whole Candidate Score," a weighted index comprised of variables like SAT score, class rank, and performance on the Army's Physical Aptitude Exam. Duckworth found, however, that cadets with the highest scores on the Grit Scale were 60 percent more likely to make it through Beast Barracks than cadets of merely average grittiness. What's more, her Grit Scale was nearly four times as good at predicting which cadets would drop out as any of the Whole Candidate Score indicators that the Army had spent years refining.

Despite this and other successes administering the Grit Scale (she's used it to study Scripps National Spelling Bee Contestants and Ivy League college students, among others), Duckworth acknowledges that questionnaires have significant pitfalls as a research tool: answers can be faked and respondents are often biased when evaluating people they know. Even more significant, people don't have a good intuitive sense of the appropriate scale to use when assessing their own personalities.

"Let's say I ask you to evaluate yourself on the question, 'I am a hard worker.' What standard would you use?" Duckworth says. She ran into this problem recently while studying delay of gratification in students in the US and Taiwan. On objective measures US students showed much less self-control, but on surveys they gave themselves higher marks than Taiwanese students gave themselves.

The success of Duckworth's research will hinge ultimately on whether she and her colleagues can devise measurement tools that produce more replicable and precise results than the ones they are using today. Or, as she puts it, "If we cannot figure out how to measure these characteristics in some kind of reasonable timeframe, with some kind of objectivity, the research will grind to a halt because we can't measure what it is that we want to actually study."

Measurement innovations are at the heart of two large-scale projects that Duckworth is launching this year: The first is a three-year-long study of self-control funded by a grant from the John Templeton Foundation. Students ranging from pre-kindergarteners to college seniors will be asked to complete boring software tasks while resisting the temptation to divert their attention to more entertaining pursuits.

On the day I visited Duckworth she was holding a conference call where the project team was debating whether to have kids use iPads or computers in the experiment. (The concern was that very young kids wouldn't be dexterous enough with a mouse; in the end the team decided on iPads and within a couple weeks Duckworth had rounded up an additional $10,000 of funding to pay for them).

"So kids are going to be doing these boring tasks on iPads while trying to resist the temptation of switching over to play Angry Birds," Duckworth says, referring to the notoriously addictive online game. "We'll measure how well kids exert self-control in the face of temptation to take immediate gratification. Once we have these measurements established the question will be identifying strategies kids can adopt that will make it easier for them to do well in these tasks."

The second study is on college persistence and will be carried out over the next two years with a $1.8 million grant from the Gates Foundation. College persistence has become a hot topic recently, as evidence has emerged showing that even when low-income students catch up academically with their middle-class peers, they still end up dropping out of college at disproportionately high rates. Most recently, the KIPP Foundation reported that while its intensive approach to academic instruction succeeded in getting 80 percent of its students into college over the last decade, only 33 percent of those students ended up with a college diploma. That number is above the 8 percent of low-income students nationwide who complete college, but it still falls well short of college graduation rates for middle-class students.

> "If you wanted to help kids, it's not immediately obvious how you'd go about changing poverty. So the direction I'm more excited about is the effects that schools can have on kids. We might not be able to make a family richer, but maybe we can make their kids grittier or more self-controlled."

In the Gates project, Duckworth and a group of high-profile collaborators will conduct several studies that attempt to quantify the personality factors that distinguish college graduates from college dropouts with similar demographic and academic backgrounds. Their goal will be to "provide new insight into student factors that predict college persistence and develop strategies to cultivate them via school-based interventions."

Duckworth's part of the study is based on the work of Anders Ericsson, the Florida State University psychologist whose work on the personality characteristics and training habits of truly exceptional performers was popularized in Malcolm Gladwell's recent best-seller *Outliers*. Duckworth and her research team will conduct an in-depth analysis of a small number of high school students from minority backgrounds who demonstrated superior academic growth from ninth to 12th grade. These superstar students will be compared against peers who entered high school at similar levels of achievement but made significantly less academic progress en route to graduation. One technique she'll be using to make the comparisons is an innovative new measure called an "emote-aloud protocol" in which participants are instructed to narrate their feelings as they perform a demanding task.

"We're going to be applying the same methodology that Ericsson used to understand Olympic athletes to understand kids in school," Duckworth says. "We're going to put the kids under the microscope to understand what high-achieving kids do differently. We'll follow them through college and see whether the habits we identify actually have a payoff when they're in a new environment. We want to know what achievement personality looks like in kids and how we get more of it—what do you do, what do the parents do, what do the schools do."

THE most concerted effort to date to implement Duckworth's research is taking place at KIPP Infinity Middle School in Harlem, New York. The KIPP network of charter schools was co-founded by Dave Levin and Mike Feinberg C'91 ["Alumni Profiles," Nov|Dec 2000] in Houston in 1994, when they were both working as fifth-grade teachers through Teach for America. Since then KIPP has expanded to 109 schools in 30 low-income regions around the country, and has become one of the most prominent education-reform organizations in the country.

The KIPP model is based on the premise that a high-performing school by itself can overcome the disadvantage that poor, typically minority students face in many other areas of their lives. The basic tools of a KIPP school are an extended school day (often running from 7:30 a.m. to 5 p.m. or later), a longer school year, intensive math and literacy instruction, and a pervasive focus on the goal of graduating from college.

From the beginning, character development has been an essential part of a KIPP education, as captured by the organization's ubiquitous slogan: "Work Hard. Be Nice." Over the last five years Levin, who serves on the KIPP board of directors and is superintendent of KIPP's eight schools in the New York area, has teamed up with Duckworth to formalize the way KIPP NYC teaches character—to measure and monitor it, and institute strategies for enhancing it.

The cornerstone of the initiative is the "KIPP Character Report Card," which teachers use to assess students on character traits that KIPP considers intrinsic to high achievement. The idea for the character report cards originated in a 2005 meeting at Penn that included Seligman, Levin, Duckworth, and Christopher Peterson, a psychologist at the University of Michigan.

At the time of the meeting Peterson and Seligman had just finished collaboration on an 800-page tome called *Character Strengths and Virtues: A Handbook and Classification.* To write the book they had scoured essential texts from cultures throughout history, looking for character strengths that have been considered building blocks of the good life no matter where or who you are. In the end they came up with 24, ranging from bravery to prudence to self-control.

Peterson and Seligman's book provided Levin with a framework for thinking about character in a more systematic way, and in Duckworth he found the perfect person to help him translate that framework into an assessment tool he could use at KIPP. "Angela is one of the elite people in the country to combine a deep understanding of K-12 education with the highest credentials of a researcher," Levin says. "It was a natural fit for us to work together."

Levin and Duckworth's first step was to boil the 24 traits down to those with particular relevance for school. They removed traits like modesty, spirituality, and fairness, and settled on a list of seven that seemed particularly essential for high academic achievement: zest, grit, self-control, curiosity, social intelligence, gratitude, and optimism. (Love actually made the initial cut, but, Duckworth says, "Dave didn't want to have to tell a parent, 'Your kid is low on love,'" so they swapped it out for curiosity.)

Once the seven traits had been determined, the next step was to figure out how to measure them—to define, for example, what optimism or zest looks like in practice. The criteria for measuring each trait didn't have to produce results that concurred with some absolute value, because there is no truly objective definition or measure of something like zest. Instead, Levin and Duckworth's goal was to agree on criteria that matched their general understanding of the character traits, that were easy for teachers to observe, and that produced results which corresponded roughly with anecdotal evaluations of which students had more or less of a given trait.

In the final KIPP Character Report Card each trait is broken down into two to four indicators on which students are given scores from 1-5. The indicators for optimism are "Gets over frustrations and setbacks quickly" and "Believes that effort will improve his or her future." One of the indicators for zest is the relatively easy to quantify "Actively participates," while another is the less tangible "Invigorates others." Indicators for self-control are more concrete and include: "Comes to class

prepared," "Allows others to speak without interruption," and "Remembers and follows directions."

Duckworth is aware that measuring character to two decimal places on a report card could be perceived as unduly harsh, particularly if it's seen to overlook the role that poverty plays in depressing achievement among low-income students. But in her view character isn't purely innate—instead, she argues, it's just as influenced by environmental forces as things like reading scores and high school graduation rates, which most people feel entirely comfortable quantifying and evaluating.

"One of the problems with the word *character* is that it carries a lot of baggage," Duckworth says. "People sometimes think that emphasizing character means not emphasizing environmental conditions like growing up in poverty or not having good role models. But I think it's a false distinction, because your character is influenced by how you grew up—it's not like there's character on one side and environmental forces on the other. Given that, if you wanted to help kids, it's not immediately obvious how you'd go about changing poverty. So the direction I'm more excited about is the effects that schools can have on kids. We might not be able to make a family richer, but maybe we can make their kids grittier or more self-controlled."

There is scattered evidence showing that programmatic school-based character interventions work. Some of the most frequently cited interventions include Tools of the Mind, a preschool program that helps students develop self-regulation tools, and the Chicago School Readiness Project, which trains preschool teachers on how to instruct kids in self-control. Overall, though, the research in this area has been limited. It's still unknown whether personality is like a person's height—which is measurable, but not modifiable—or whether it's more like blood pressure or cholesterol levels, which can be measured and modified, and which can be influenced at a population level by public health initiatives.

At the end of my conversation with Seligman I asked him whether he thinks we'll see the day when schools are teaching kids grit and self-control alongside phonics and fractions. I expected the father of positive psychology to be bullish, but he was surprisingly skeptical. "I think Angela has made some progress in this area," he said. "But it is interesting to me that for 3,000 years at least teachers have been trying to get more self-discipline out of kids without figuring out how. So for me the modification of grit and self-discipline are still hopes and promissory notes as opposed to fact."

For Duckworth, however, the challenge of her research question is part of its appeal. She spent the first decade of her professional life unsure of how to apply her abundant talent. Now she no longer has any doubts. "I have complete conviction that this is an incredibly important scientific question," she says. "If we can figure out the science of behavior and behavior change, if we can figure out what is motivation and how to motivate people, what is frustration and how do we manage it, what is temptation and why do people succumb to it—that to me would be akin to the semiconductor." ◆

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BROOKINGS

Should Everyone Go to College?

By: Isabel V. Sawhill and Stephanie Owen

Not all college degrees or all college graduates are created equal. On average, the benefits of a college degree outweigh their costs. However, in "Should Everyone Go to College?" Brookings Senior Fellow Isabel Sawhill and Stephanie Owen argue that it is important to compare the return on investment by other variables, such as choice of major and college selectivity, in order to better assess whether or not a four-year degree will significantly improve an individual's future earnings.

Should Everyone Go to College?

On average, the benefits of a college degree far outweigh the costs. Looking at lifetime earnings, the total wage premium for a bachelor's degree is **$570,000**.

Earnings trajectories by educational attainment [1]
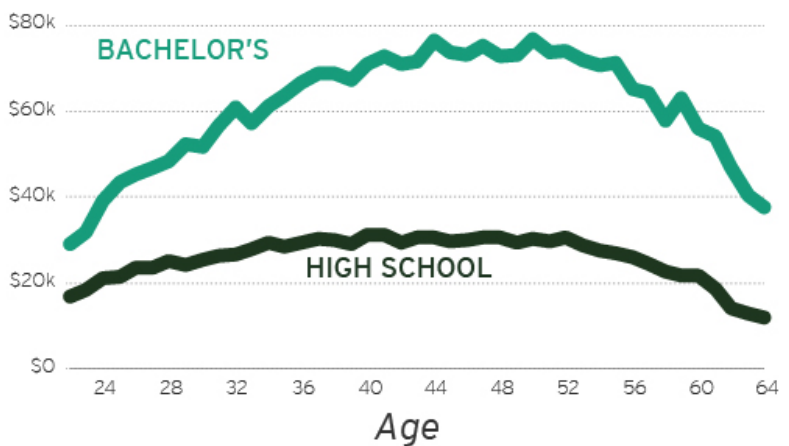
But the key phrase here is

"ON AVERAGE"

Several key dimensions significantly affect the return on a college degree, including
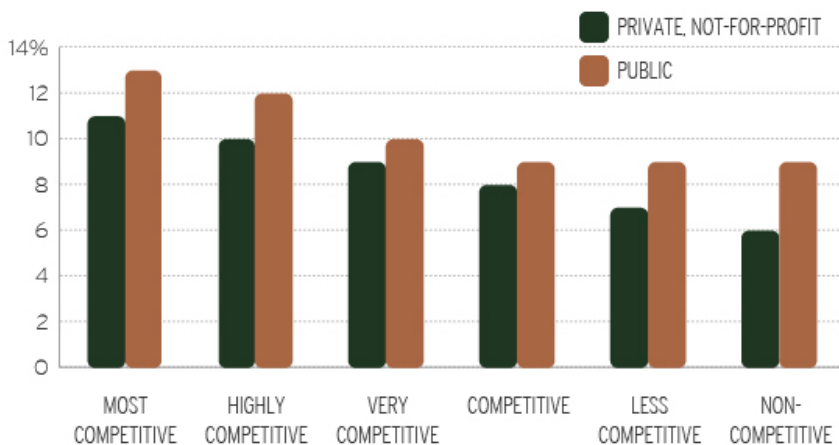
SCHOOL SELECTIVITY

#1

COLLEGE MAJOR

GRADUATION RATE

Not every bachelor's degree is a smart investment

Public schools tend to have higher return on investment (ROI) than private schools, and more selective schools offer higher returns than less selective ones.

Annual return on investment of a bachelor's degree [2]

Legend:
- ■ PRIVATE, NOT-FOR-PROFIT
- ■ PUBLIC

Y-axis: 14%, 12, 10, 8, 6, 4, 2, 0

X-axis: MOST COMPETITIVE, HIGHLY COMPETITIVE, VERY COMPETITIVE, COMPETITIVE, LESS COMPETITIVE, NON-COMPETITIVE
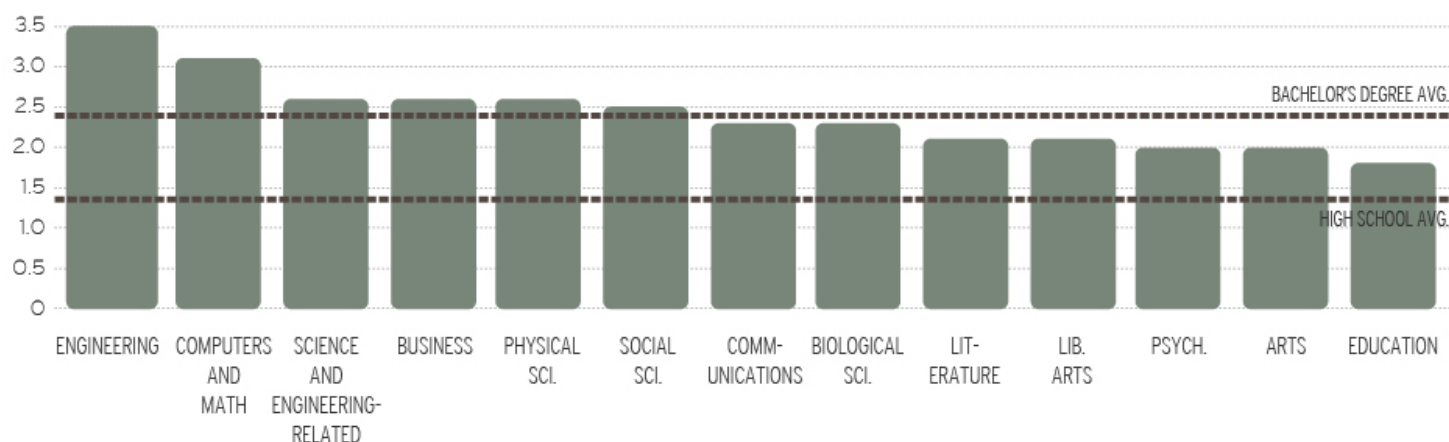
NEARLY

1 in 5

of the 853 schools studied by PayScale offered a **negative** ROI.

Major matters

Recent analysis by the Census Bureau also shows that the lifetime earnings of workers with bachelor's degrees vary widely by college major and occupation.

Work-life earnings, in millions of $U.S., by major [3]

BACHELOR'S DEGREE AVG.

HIGH SCHOOL AVG.

ENGINEERING | COMPUTERS AND MATH | SCIENCE AND ENGINEERING-RELATED | BUSINESS | PHYSICAL SCI. | SOCIAL SCI. | COMM-UNICATIONS | BIOLOGICAL SCI. | LIT-ERATURE | LIB. ARTS | PSYCH. | ARTS | EDUCATION

> The lifetime earnings of an education or arts major working in the service sector are actually **lower** than the average lifetime earnings of a high school graduate.

✅ *Debt without a degree*

Students who fail to obtain a degree incur the costs of an education without the payoff. More selective schools tend to have higher graduation rates.

Fewer than

60%

of students who enter four-year schools finish within six years.

Average six-year graduation rates by school selectivity [4]

MAXIMUM

88

75

62

49

40

35

MINIMUM

MOST COMPETITIVE | HIGHLY COMPETITIVE | VERY COMPETITIVE | COMPETITIVE | LESS COMPETITIVE | NON-COMPETITIVE

Policy implications

What can policymakers provide to help students make smart investments in their postsecondary education?

BETTER INFORMATION

Information on financial aid and graduation rates needs to be more readily available. The PayScale college rankings and the Obama Administration's new College Scorecard are steps in the right direction.

PERFORMANCE-BASED SCHOLARSHIPS

Good research on programs like Georgia's HOPE scholarships or West Virginia's PROMISE scholarships suggest that attaching strings to grant aid can improve college persistence and completion.

GOOD ALTERNATIVES TO COLLEGE

There are many well-paid job openings going unfilled because employers can't find workers with the right skills–skills that young workers could learn from training programs, apprenticeships, a vocational certificate, or an associate's degree.

All of this suggests that it is a **mistake** to unilaterally tell young Americans that going to college–any college–is the best decision they can make. A bachelor's degree is not a smart investment for every student in every circumstance.

CENTER ON CHILDREN & FAMILIES
at BROOKINGS

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SUMMARY

On average, the benefits of a college degree outweigh their costs. But Isabel Sawhill and Stephanie Owen argue that it is important to compare other variables, such as choice of major and college selectivity, in order to better assess the return on investment of a college degree.

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