



## Rogue Workforce Partnership - Corporate Directors Meeting

Tuesday, January 31, 2017 • 3:00-5:00 p.m. | 100 E. Main Street, Suite A - Board Room • Medford

Video/Phone Conference access available at <https://global.gotomeeting.com/join/700251709>. Select your audio preference:  
1) Use telephone: 1+ (571) 317-3112; Access Code: 700-251-709 (normal long distance charges will apply); 2) Or, use computer microphone & speakers (headset is recommended to avoid reverb)

### Agenda

1. **Call to Order** (2m) Jessica Gomez
  - Welcome & Introductions
  
2. **Consent Agenda** (1m) - **Action Item** Jessica

*Consent agenda items are voted on as a single block unless a member wishes to pull an item(s) out for discussion*

  - a. **Approval of Minutes** –
    - November 17, 2016 - RWP Corporate Directors Meeting
  
3. **RWP Governance / Administration** (45-50m)
  - Membership Update Jim Fong
  - Getting More Organized with our Meetings Dave Fricke, Julie Gillis
    - Workforce Board Meeting Schedule
    - Roles & Responsibilities
    - Meeting goals, agendas & structure
  - 2017 Meeting Schedule & Attendance Policy - **Action Item** Jim
  
4. **Dashboard Next Steps** (20-30m) Jim, Dave
  - Broadening the focus to entire workforce system
  - Adding Fiscal Reports
  
5. **Public Workforce System** (10-15m) Jim, Dave
  - Fulfilling WIOA Requirements
    - Memorandum of Understanding
    - Resource Sharing Agreement
    - One-Stop Operator
  
6. **State & Federal Coordination - Outreach & Systems Alignment** (20-30m)
  - **State of Oregon** Jim
    - **Proposed State Budgets** Jim
      - [Governor's Budget](#) + News: [Oregonian](#)
      - [Legislative Co-Chairs Budget](#) + News: [Oregonian1](#), [Oregonian2](#), [Statesman Journal](#)
    - **Response Letters to Governor Brown Request** Jim
  
  - **Federal** Jim, Jessica
    - Emerging Budget Scenarios & Next Steps Jim

7. **Philanthropic Grant Applications** (5-10m) Jim
- Aspen Institute - [Reimagine Retail Career Pathways](#)
  - Ford Family Foundation – [Education for Career Readiness](#)
  - Bank of America – [Economic Mobility Focused on the needs of individuals & families](#)
8. **Other Items** Jessica
9. **Adjourn** Jessica

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



**MINUTES**

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

November 17, 2016 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

**MEMBERS PRESENT**

Commissioner Cheryl Walker (via phone)  
Michael Donnelly (via phone)  
Nikki Jones  
Jessica Gomez

**MEMBERS ABSENT**

Commissioner Rick Dyer  
Tamara Nordin  
Gregg Edwards

**OTHERS PRESENT**

Shawn Hogan, Linx Technologies  
John Underwood, Timber Products  
Sherri Stratton, WorkSource Rogue Valley OED  
Pat Huycke, Attorney (via phone)  
Jim Fong, Executive Director, Rogue Workforce Partnership  
Aurora King, Rogue Workforce Partnership  
Julie Gillis, Rogue Workforce Partnership  
David Fricke, Rogue Workforce Partnership  
Rebecca Williams, Rogue Workforce Partnership  
Tami Allison, Rogue Workforce Partnership

**Quorum Present: No**

**1) Call to Order**

The meeting was started informally as Jessica has been delayed. Introductions were made.

**2) Consent Agenda**

Due to lack of a quorum, this agenda item is tabled to the January meeting.

**3) RWP Governance/Administration**

**PERS & Job Council Liability**

Pat Huycke joined the meeting by phone in case directors had any questions. Jim reviewed the information in today's agenda packet and summarized that this is an update of information on communication between the counties, PERS, and RWP. The directors indicated that we should continue to manage funds as we have to date and the legal matter,

if any, will be handled through legal counsel. Commissioner Walker did not comment based on the fact that her legal counsel is not present.

#### 4) Feedback on Dashboard

Aurora walked through the dashboard handout with the group noting that the intent is to identify the top metrics that would make the most sense to review with the board on a quarterly basis. The following are suggested improvements:

##### Goal #1-

- add a column to show closed listings under Goal #1 – to be able to view how many self-referrals resulted in a hire.
- Add a column to show numbers as well as percentages

##### Goal #2-

- Start with the total number of customers registered
  - Customers who got a job
    - Completed welcome process
    - Did not complete welcome process
  - List definitions on the back of the dashboard

##### Goal #3

- Total number of workshops (unduplicated count)
- Goal structure may need revision?
  - What types of data relate to each goal?
  - Have the Board identify what they want to see that would be evidence of meeting the goal.

The group discussed using the outcomes and measures table from the strategic plan, but decided that the dashboard shows a more current view of the information. Some general suggestions/improvements followed:

- Pick reasonable indicators and start tracking
  - Job listings
  - Sector skills completers
  - Sector skills completers who were placed
  - Percentage of sector listings closed
  - Total listings closed
  - Number of new businesses doing OJT's
- Customer-centric
  - Number of people registered
    - OJT's completed
    - Placements after OJT
- How much of the whole are our focused sectors? Are we focusing on the right sectors?
- Possibly use NPS (Net promoter score) to survey and measure effectiveness
  - Key Performance Indicators
    - Program Metrics

Next Steps:

- Refine the dashboard based on today’s conversation

Jim added that all of the information we just reviewed, and more, is just one strand of information from one of many partners. Is there a way to expand this exercise to include the other partners as well?

Jim referred the group to the PY 12 financial data for all the mandated partners in the system.

Jim concluded this topic by thanking John and Shawn for coming today to lend their expertise to this exercise and asked them both if they were interested in joining the Corporate Directors. Both gentlemen will forward their responses at a later date.

5) **Coordination, Guidance & Decision-Making for RWP**

- **Contract Management & Monitoring**

This agenda item was tabled to a future meeting.

- **RWP Workforce Board December 15 Meeting – Agenda Prep**

Jim noted that RWP staff has started to meet with Jessica prior to both Corporate Director’s meetings and workforce board meetings to flesh out the agendas. Jim asked the Corporate Directors to spend some time today discussing how to best convey information to the board on all the initiatives we are working on. Suggestions for agenda topics are as follows:

- Sector strategy group updates
- Show videos that have been made
- Veteran’s Incentive Award
- OTC grant update
- RCC Technology grant

6) **Other Items**

No other items were brought before the RWP Corporate Directors.

7) **Adjourn**

With no further business, the RWP Corporate Directors meeting was informally adjourned at 5:25 pm.

Respectfully Submitted,

Tami Allison  
Executive Projects Manager

---

Approved

Date

Jessica Gomez, RWP Chair

RWP Workforce Board ♦ Membership & Positions (DRAFT / Proposed)

v20170126jf

Business Representatives ♦ <i>Mandatory Majority</i>			Labor Representatives (2) ♦ <i>Mandatory</i> (could add members)		
1	<b>Jessica Gomez*</b> ♦ Founder & CEO <i>RWP Chair</i>	Rogue Valley Microdevices	<b>Jon Flegel</b> ♦ Labor Representative	<b>IBEW Local 659</b> - International Brotherhood of Electrical Workers	1
2	<b>Gregg Edwards*</b> ♦ Chief People Officer <i>RWP Vice-Chair</i>	ASANTE Health Systems	<del>Wes Brain</del> ♦ Labor Representative <b>Dan Watts – Plumbers &amp; Steamfitters</b>	<del>SEIU 503</del> – Service Employees International Union	2
			<i>Joint Apprenticeship Training Center (1) ♦ Mandatory</i> (could add members)		
3	<b>Michael Donnelly*</b> ♦ Materials & Facilities Manager	Carestream, Inc.	<b>Lance Corley</b> ♦ Inside Construction Director	<b>Crater Lake Electrical JATC – Joint Apprenticeship Training Committee</b>	3
			<i>Community-Based Organizations</i> - with demonstrated experience & expertise in addressing the employment needs of individuals with barriers to employment - serve <b>veterans</b> , or individuals with <b>disabilities</b>		
			<i>Organizations</i> - with demonstrated experience & expertise in addressing the employment, training, or education needs of <b>eligible youth</b> , including representatives of organizations that serve <b>out-of-school youth</b>		
4	<b>Nikki Jones*</b> ♦ Owner	Express Employment Professionals	<b>Brian Shumate</b> ♦ Superintendent	<b>Medford School District</b>	4
5	<b>Brent Kell</b> ♦ Executive Director	Valley Immediate Care	<b>Kirk Kolb</b> ♦ Superintendent	<b>Grants Pass School District</b>	5
6	<b>John Underwood*</b> ♦ Human Resources Manager	Timber Products	<b>Scott Beveridge</b> ♦ Superintendent	<b>Southern Oregon Education Service District</b>	6
			<i>Education &amp; Training – Title II &amp; Higher Education ♦ Mandatory</i>		
7	<b>Norm Kester</b> ♦ CEO	Quantum Innovation	<b>Cathy Kemper-Pelle</b> ♦ President	<b>Rogue Community College</b>	7
			<i>Economic / Community Development ♦ Mandatory</i>		
8	<del>Adam Cuppy</del> / <b>Trever</b> ♦ Co-Founder &	Zeal	<b>Colleen Padilla</b> ♦ Executive Director	<b>SOREDI</b>	8
			<i>OED / Wagner-Peyser ♦ Mandatory</i>		
9	<b>Chad Scott</b> ♦ Director Human Resources	Fire Mountain Gems & Beads	<b>Sherri Stratton</b> ♦ Senior Manager	<b>Oregon Employment Department</b>	9
			<i>Vocational Rehabilitation ♦ Mandatory</i>		
10	<b>Shawn Hogan*</b> ♦ VP of Engineering	Linx Technologies, Inc.	<b>Matthew Balkwill</b> ♦ Area Manager	<b>Office of Vocational Rehabilitation Division</b>	10
			<i>Optional Members</i>		
11	<b>Catherine Goslin</b> ♦ Director of Human Resources	Rogue Valley Manor	<del>Doug Mares</del> / <b>Jeremy or Rosemary?</b> ♦ District Manager	<b>Oregon Department of Human Services</b>	11
12	<b>Kim Oveson</b> ♦ Human Resource Officer	LaClinica	<b>Linda Schott</b> ♦ President ( <i>Sue Walsh –proxy?</i> )	<b>Southern Oregon University</b>	12
13	<b>Fred Holloway</b> ♦ President	Holloway Human Resource Management Consulting	<b>Nagi Naganathan</b> President	<b>Oregon Institute of Technology</b>	13
14	<b>Scott Koch</b> ♦ VP/Territory Manager	Umpqua Bank			
<b>Total RWP Workforce Board Membership = 27</b>					

*Mandatory*  
Must be  
20% of  
Workforce  
Board

**Mandatory** = WIOA Workforce Board Membership Requirement

**\*** = Corporate Director

**■** = Proposed New Member

**■** = Possible Candidate to be Contacted or Vacant Position

+ ? **Joe Meyers** ♦ **Pacific Electrical Contractors**

- **Teresa Sayre**

□ **Superintendent** School District

---

---

## **WORKFORCE INNOVATION & OPPORTUNITY ACT**

---

### **SEC. 3. DEFINITIONS.**

**(10) COMMUNITY-BASED ORGANIZATION.**—The term “community-based organization” means a private nonprofit organization (which may include a faith-based organization), that is representative of a community or a significant segment of a community and that has demonstrated expertise and effectiveness in the field of workforce development.

**(11) COMPETITIVE INTEGRATED EMPLOYMENT.**—The term “competitive integrated employment” has the meaning given the term in section 7 of the Rehabilitation Act of 1973 (29 U.S.C. 705), for individuals with disabilities.

---

### **SEC. 107. LOCAL WORKFORCE DEVELOPMENT BOARDS.**

**(2) COMPOSITION.**—Such criteria shall require that, at a minimum—

(A) a majority of the members of each local board shall be representatives of **business** in the local area, who—

- (i) are owners of businesses, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;
- (ii) represent businesses, including small businesses, or organizations representing businesses described in this clause, that provide employment opportunities that, at a minimum, include high-quality, work-relevant training and development in in-demand industry sectors or occupations in the local area; and
- (iii) are appointed from among individuals nominated by local business organizations and business trade associations;

(B) not less than 20 percent of the members of each local board shall be representatives of the workforce within the local area, who—

- (i) **shall** include representatives of **labor organizations** (for a local area in which employees are represented by labor organizations), who have been nominated by local labor federations, or (for a local area in which no employees are represented by such organizations) other representatives of employees;
- (ii) **shall** include a representative, who shall be a member of a labor organization or a training director, from a **joint labor-management apprenticeship program**, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area, if such a program exists;

(iii) may include representatives of **community based organizations** that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve **veterans** or that provide or support competitive integrated employment for individuals with **disabilities**; and

(iv) may include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of **eligible youth**, including representatives of organizations that serve **out-of-school youth**;

(C) each local board shall include representatives of entities administering **education and training** activities in the local area, who—

- (i) **shall** include a representative of eligible providers administering **adult education and literacy** activities under title II;
- (ii) **shall** include a representative of institutions of **higher education** providing workforce investment activities (including community colleges);
- (iii) may include representatives of **local educational agencies**, and of **community-based organizations** with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment;

(D) each local board shall include representatives of governmental and **economic and community development** entities serving the local area, who—

- (i) **shall** include a representative of **economic and community development** entities;
- (ii) **shall** include an appropriate representative from the **State employment service** office under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) serving the local area;
- (iii) **shall** include an appropriate representative of the programs carried out under title I of the **Rehabilitation** Act of 1973 (29 U.S.C. 720 et seq.), other than section 112 or part C of that title (29 U.S.C. 732, 741), serving the local area;
- (iv) may include representatives of agencies or entities administering programs serving the local area relating to **transportation, housing, and public assistance**; and
- (v) may include representatives of **philanthropic organizations** serving the local area; and

(E) each local board may include such **other** individuals or representatives of entities as the chief elected official in the local area may determine to be appropriate.

---

---

# RWP Board Structure

---

## CORPORATE BOARD

- RWP Corporate oversight:
  - A. 1B Budget and Performance
  - B. RWP Policies
  - C. Oversight of other RWP Grants
  - D. Executive Director Supervision
- Take Official Agency Action between WFB Quarterly meetings
- Report activities to WFB quarterly
- Coordinate Committee Reporting Quarterly

## WORKFORCE BOARD

Federally Required

Workforce System Oversight

Workforce System Alignment

Workforce System Strategic Planning

Board Recruiting, Orientation and Retention

Active participation in Workforce System activities and reporting on activities as requested/appropriate.

\*\*Workforce partners include Oregon Employment Division (OED), Oregon Department of Human Services, Self-Sufficiency and Office of Vocational Rehabilitation Services, Title II/Rogue Community College and Title 1B

# RWP Board Structure

---

## CORPORATE BOARD ADMIN

Previous Corporate and Workforce Board Agendas

Roles and Responsibilities/Board to RWP staff relationship.

Carryover business

Reporting tool for Quarterly Workforce Board meetings

Copies of Title 1B Budgets

RWP Policies and Procedures

RWP Audits

Other RWP Admin/oversite materials as required/requested

## WORKFORCE BOARD ADMIN

Recruiting Letter

Board Application

Welcome Letter (Orientation/ meeting schedule and process)

Organizational chart

Roles and Responsibilities

Board to RWP Relationship

Articles of Incorporation and Bylaws

Most recent RWP Financial Audit and Fiscals

Most recent State of the Workforce Annual Report

Most current RWP Strategic Plan

Previous months/meeting Agenda and Minutes

List of current Sub-Committees

# RWP Board Agenda

---

## CORPORATE BOARD

- Welcome
- Introduction of Guests
- Modifications of Agenda
- Approve Previous Meeting Minutes
- RWP Fiscal Review
  1. Contract Budget to Actual Reconciled
  2. Outstanding Contractual Obligation
  3. RWP Agency Budget to Actual
  4. RWP Reconciled Financial Report
- Outstanding business from previous WFB meeting
- Outstanding business from previous Corporate Board meeting
- New business
- Data Dashboard
- Roundtable
- Adjourn

## WORKFORCE BOARD

- Welcome
- Introduction of Guests
- Modifications to the agenda
- Approve previous WFB meeting minutes
- Approve Fiscal Report as presented by Corporate Board
- Committee Reports
  - 1) Corporate Directors
  - 2) Sector Strategy activities (RAMP, RV Tech Collective, Health Care, Emerging Sectors)
  - 3) College and Career for All
  - 4) WIOA
  - 5) Other
- Workforce System Alignment Update (LLT??)
- Open Mic/Community Roundtable
- Adjourn

# Considerations

---

1. Develop a complete RWP and Workforce System organizational Chart
2. Does the Corporate Board Function as the “lead” Board with the WFB under it or Vice Versa
3. Connection between Corporate Directors and Workforce Board
4. Reporting tool from Corporate Board to Workforce Board
5. Setting meeting dates for both Boards
6. Reaffirm membership commitment
7. Remain current on Workforce Board composition, needs, recruitment strategies, etc.

First	Last	Wed 3/1	Thur 3/2	Wed 3/8	Thur 3/9	Wed 3/15	Thur 3/16	Wed 3/22	Thur 3/23	Wed 3/29	Thur 3/30	Wed 6/7	Thur 6/8	Wed 6/14	Thur 6/15	Wed 6/21	Thur 6/22	Wed 6/28	Thur 6/29	Wed 9/6
<b>Quorum Members</b>																				
Matt	Balkwill	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Scott	Beveridge			X									X			X				X
Wes	Brain		X			X								X						X
Lance	Corley			X											X					X
Adam	Cuppy																			
Michael	Donnelly		X	X				X				X	X	X						X
Gregg	Edwards																			
Jon	Fliegel			X	X															
Jim	Fong																			
Jessica	Gomez	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Catherine	Goslin		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Shawn	Hogan		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Fred	Holloway		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Rosemary	Jernigan		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Nikki	Jones																			
Brent	Kell		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cathy	Kemper-Pelle			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Norm	Kester																			
Scott	Koch																			
Kirk	Kolb		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Joe	Myers			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Nagi	Naganathan																			
Kim	Oveson																			
Colleen	Padilla				X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Teresa	Sayre																			
Linda	Schott																			
Chad	Scott																			
Brian	Shumate																			
Sherr	Stratton		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
John	Underwood																			
<b>Non-Quorum</b>																				
Rick	Dyer	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Jim	Fong		X																	
Dan	DeYoung																			

Mar-17

Jun-17



# Workforce Innovation & Opportunity Act – Final Rule

Vol. 81. No. 161 August 19, 2016

---

## Subpart C—Local Workforce Development Boards

### § 679.300 What is the vision and purpose of the Local Workforce Development Board?

(a) The vision for the Local WDB is to serve as a strategic leader and convener of local workforce development system stakeholders. The Local WDB partners with employers and the workforce development system to develop policies and investments that support public workforce system strategies that support regional economies, the development of effective approaches including local and regional sector partnerships and career pathways, and high quality, customer centered service delivery and service delivery approaches;

(b) The purpose of the Local WDB is to—

- (1) Provide strategic and operational oversight in collaboration with the required and additional partners and workforce stakeholders to help develop a comprehensive and high-quality workforce development system in the local area and larger planning region;
- (2) Assist in the achievement of the State’s strategic and operational vision and goals as outlined in the Unified State Plan or Combined State Plan; and
- (3) Maximize and continue to improve the quality of services, customer satisfaction, effectiveness of the services provided.

### § 679.310 What is the Local Workforce Development Board?

(a) The Local WDB is appointed by the chief elected official(s) in each local area in accordance with State criteria established under WIOA sec. 107(b), and is certified by the Governor every 2 years, in accordance with WIOA sec. 107(c)(2).

(b) In partnership with the chief elected official(s), the Local WDB sets policy for the portion of the statewide workforce development system within the local area and consistent with State policies.

(c) The Local WDB and the chief elected official(s) may enter into an agreement that describes the respective roles and responsibilities of the parties.

(d) The Local WDB, in partnership with the chief elected official(s), develops the local plan and performs the functions described in WIOA sec. 107(d) and § 679.370.

(e) If a local area includes more than one unit of general local government in accordance with WIOA sec. 107(c)(1)(B), the chief elected officials of such units may execute an agreement to describe their responsibilities for carrying out the roles and responsibilities. If the chief elected officials are unable to reach agreement after a reasonable effort, the Governor may appoint the members of the Local WDB from individuals nominated or recommended as specified in WIOA sec. 107(b).

(f) If the State Plan indicates that the State will be treated as a local area under WIOA, the State WDB must carry out the roles of the Local WDB in accordance with WIOA sec. 107, except that the State is not required to meet and report on a set of local performance accountability measures.

(g) The CEO must establish by-laws, consistent with State policy for Local WDB membership, that at a minimum address:

- (1) The nomination process used by the CEO to select the Local WDB chair and members;

- (2) The term limitations and how the term appointments will be staggered to ensure only a portion of membership expire in a given year;
- (3) The process to notify the CEO of a WDB member vacancy to ensure a prompt nominee;
- (4) The proxy and alternative designee process that will be used when a WDB member is unable to attend a meeting and assigns a designee as per the requirements at § 679.110(d)(4);
- (5) The use of technology, such as phone and Web-based meetings, that will be used to promote WDB member participation;
- (6) The process to ensure WDB members actively participate in convening the workforce development system's stakeholders, brokering relationships with a diverse range of employers, and leveraging support for workforce development activities; and
- (7) A description of any other conditions governing appointment or membership on the Local WDB as deemed appropriate by the CEO.

**679.370 What are the functions of the Local Workforce Development Board?**

As provided in WIOA sec. 107(d), the Local WDB must:

- (a) **Develop and submit a 4-year local plan** for the local area, in partnership with the chief elected official and consistent with WIOA sec. 108;
- (b) If the local area is part of a planning region that includes other local areas, develop and submit a regional plan in collaboration with other local areas. If the local area is part of a planning region, the local plan must be submitted as a part of the regional plan;
- (c) **Conduct workforce research and regional labor market analysis** to include:
  - (1) Analyses and regular updates of economic conditions, needed knowledge and skills, workforce, and workforce development (including education and training) activities to include an analysis of the strengths and weaknesses (including the capacity to provide) of such services to address the identified education and skill needs of the workforce and the employment needs of employers;
  - (2) Assistance to the Governor in developing the statewide workforce and labor market information system under the Wagner-Peyser Act for the region; and
  - (3) Other research, data collection, and analysis related to the workforce needs of the regional economy as the WDB, after receiving input from a wide array of stakeholders, determines to be necessary to carry out its functions;
- (d) **Convene local workforce development system stakeholders to assist in the development of the local plan** under § 679.550 and in **identifying non-Federal expertise and resources to leverage support for workforce development activities**. Such stakeholders may assist the Local WDB and standing committees in carrying out convening, brokering, and leveraging functions at the direction of the Local WDB;
- (e) Lead efforts to **engage with a diverse range of employers and other entities in the region** in order to:
  - (1) **Promote business representation** (particularly representatives with optimum policy-making or hiring authority from employers whose employment opportunities reflect existing and emerging employment opportunities in the region) on the Local WDB;

(2) **Develop effective linkages** (including the use of intermediaries) **with employers** in the region to **support employer utilization of the local workforce development system** and to **support local workforce investment activities**;

(3) **Ensure that workforce investment activities meet the needs of employers and support economic growth** in the region by enhancing communication, coordination, and collaboration among employers, economic development entities, and service providers; and

(4) **Develop and implement proven or promising strategies for meeting the employment and skill needs of workers and employers** (such as the establishment of industry and sector partnerships), that provide the skilled workforce needed by employers in the region, and that expand employment and career advancement opportunities for workforce development system participants in in-demand industry sectors or occupations;

(f) With representatives of secondary and postsecondary education programs, lead efforts to **develop and implement career pathways** within the local area by aligning the employment, training, education, and supportive services that are needed by adults and youth, particularly individuals with barriers to employment;

(g) Lead efforts in the local area to **identify and promote proven and promising strategies and initiatives** for meeting the needs of employers, workers and job seekers, and identify and disseminate information on proven and promising practices carried out in other local areas for meeting such needs;

(h) **Develop strategies for using technology to maximize the accessibility and effectiveness of the local workforce development system** for employers, and workers and job seekers, by:

(1) Facilitating connections among the intake and case management information systems of the one-stop partner programs to support a comprehensive workforce development system in the local area;

(2) Facilitating access to services provided through the one-stop delivery system involved, including access in remote areas;

(3) Identifying strategies for better meeting the needs of individuals with barriers to employment, including strategies that augment traditional service delivery, and increase access to services and programs of the one-stop delivery system, such as improving digital literacy skills; and

(4) Leveraging resources and capacity within the local workforce development system, including resources and capacity for services for individuals with barriers to employment;

(i) **In partnership with the chief elected official for the local area:**

(1) **Conduct oversight of youth workforce investment activities** authorized under WIOA sec. 129(c), adult and dislocated worker employment and training activities under WIOA secs. 134(c) and (d), and the entire one-stop delivery system in the local area;

(2) **Ensure the appropriate use and management of the funds provided under WIOA subtitle B** for the youth, adult, and dislocated worker activities and one-stop delivery system in the local area; and

(3) **Ensure the appropriate use management, and investment of funds to maximize performance outcomes** under WIOA sec. 116;

(j) **Negotiate and reach agreement on local performance indicators** with the chief elected official and the Governor;

(k) **Negotiate with CEO and required partners on the methods for funding the infrastructure costs of one-stop centers** in the local area in accordance with § 678.715 of this chapter or must notify the Governor if they fail to reach agreement at the local level and will use a State infrastructure funding mechanism;

(l) **Select the following providers** in the local area, and where appropriate terminate such providers in accordance with 2 CFR part 200:

(1) Providers of **youth workforce investment activities** through competitive grants or contracts based on the recommendations of the youth standing committee (if such a committee is established); however, if the Local WDB determines there is an insufficient number of eligible training providers in a local area, the Local WDB may award contracts on a sole-source basis as per the provisions at WIOA sec. 123(b);

(2) Providers of **training services** consistent with the criteria and information requirements established by the Governor and WIOA sec. 122;

(3) Providers of **career services** through the award of contracts, if the one-stop operator does not provide such services; and

(4) **One-stop operators** in accordance with §§ 678.600 through 678.635 of this chapter; (m) In accordance with WIOA sec. 107(d)(10)(E) work with the State to ensure there are sufficient numbers and types of providers of career services and training services serving the local area and providing the services in a manner that maximizes consumer choice, as well as providing opportunities that lead to competitive integrated employment for individuals with disabilities;

(n) **Coordinate activities with education and training providers in the local area, including:**

(1) **Reviewing applications to provide adult education and literacy activities** under WIOA title II for the local area to determine whether such applications are consistent with the local plan;

(2) **Making recommendations to the eligible agency to promote alignment** with such plan; and

(3) **Replicating and implementing cooperative agreements to enhance the provision of services to individuals with disabilities and other individuals**, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination;

(o) **Develop a budget for the activities of the Local WDB**, with approval of the chief elected official and consistent with the local plan and the duties of the Local WDB;

(p) **Assess, on an annual basis, the physical and programmatic accessibility of all one-stop centers** in the local area, in accordance with WIOA sec. 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 *et seq.*); and

(q) **Certification of one-stop centers** in accordance with § 678.800 of this chapter.

**2015 Oregon Revised Statutes**  
**Chapter 660 — Apprenticeship and Training; Workforce Development**

**660.327 Duties of local workforce investment boards.** In accordance with section 2832 of the federal Act, each local workforce investment board shall:

(1) Consistent with section 2833 of the federal Act, in partnership with the chief elected official for the local area involved, **develop and submit a local plan** to the Governor. The local plan must:

- (a) Be developed by the local workforce investment board with local workforce partners;
- (b) Identify strategies and outcomes that the local workforce investment board will implement in the local workforce investment area;
- (c) Make all parties to the local plan accountable for carrying out the strategies and achieving the outcomes identified in the local plan; and
- (d) Be submitted to and approved by the State Workforce Investment Board.

(2) Consistent with section 2841(d) of the federal Act, with the agreement of the chief elected official, **designate or certify one-stop operators** as described in section 2841(d)(2)(A) of the federal Act and may terminate for cause the eligibility of such operators.

(3) Consistent with section 2843 of the federal Act, identify eligible **providers of youth activities** in the local area and **award grants or contracts** on a competitive basis to those providers, based on recommendations of a youth council.

(4) Consistent with section 2842 of the federal Act, identify eligible **providers of training services** described in section 2864(d)(4) of the federal Act.

(5) Subject to the approval of the chief elected official, **develop a budget** for the purpose of carrying out the duties of the local workforce investment board under section 2832 of the federal Act.

(6) In partnership with the chief elected official, provide **oversight of local programs of youth activities** authorized under section 2854 of the federal Act, local **employment and training activities** authorized under section 2864 of the federal Act and the **one-stop delivery system** in the local area.

(7) With the chief elected official and the Governor, **negotiate and reach agreement on local performance measures** as described in section 2871(c) of the federal Act.

(8) **Coordinate the workforce investment activities** authorized under the federal Act and carried out in the local area with **economic development strategies** and **develop other employer linkages** with such activities.

(9) **Promote the participation of private sector employers** in the statewide workforce investment system and ensure the effective provision, through the system, of connecting, brokering and coaching activities, through intermediaries such as the one-stop operator in the local area or through other organizations, to assist such employers in meeting hiring needs. [2001 c.684 §12; 2014 c.49 §7]



OREGON WORKFORCE  
PARTNERSHIP

*Better Skills • Better Jobs*

## **WORKFORCE INVESTMENT BOARDS - ROLES AND RESPONSIBILITIES**

The great recession of 2008 was a watershed year for most Americans, forcing everyone to re-assess what they do and how they do it. The workforce system is no exception. The recession has magnified existing problems and created entirely new challenges for the workforce system. High unemployment, unprecedented loss of jobs that will likely never be replaced, long-term job displacement, stagnating incomes, fragmented programs and services, growing skill gaps, diminishing resources and increasing poverty are the new realities facing the workforce system.

In response, Governor Kitzhaber delivered a powerful charge to State and local workforce partners: Build a sustainable, systemic approach to workforce development that produces a highly-skilled workforce, advances more people into family wage jobs, and helps our businesses and workers succeed in a fundamentally transformed economy. The Governor challenged us to coordinate the development of a system that will result in:

- Greater benefit for businesses and job seekers by eliminating programmatic silos and promoting greater coordination, transparency and accountability to assure Oregon has the skills to compete.
- Increased opportunities for all Oregonians, including minorities, people of color and those with disabilities.
- Increased decision making about how to use public resources to solve problems at the level closest to Oregon's people – the local level – to the greatest extent possible.
- Expanded public/private partnerships to assure the relevance and long-term sustainability of workforce programs.

To achieve the Governor's vision will require an unprecedented level of state and local collaboration. It will require clarity in roles and responsibilities, strategic coordination, smart investments and a shared commitment to think and act differently. To that end, Oregon's Workforce Investment Boards (WIBs) have prepared this document to share our collective perspective on the roles and responsibilities of WIBs in achieving the Governor's vision, and to identify areas of support we will need to fulfill our responsibilities and most effectively assist in moving the system forward.

WIBs are public-private partnerships comprised of representatives from business, labor, education, economic development, state and local government, as well as community based organizations. They bring a wealth of knowledge, skills and experiences to the workforce system. As a result, WIBs are uniquely positioned to serve as investors, conveners, coordinators and evaluators for Oregon's workforce system.

WIBs play a dual role in helping to achieve the Governor's vision. WIBs have policy, operational and quality responsibilities related to WorkSource Oregon which is a key delivery mechanism for state and local workforce development services. Through WorkSource, we have worked with our partners at the Oregon Employment Department and the Department of Community Colleges and Workforce Development, to design an agreed upon service delivery model focused on shared customers, aligned resources and common outcomes. This effort has enhanced the emphasis on skilling-up job seekers in direct response to industry needs, created more clarity and value in available products, and improved customer service and access.

Continuing to build upon and expand these efforts is essential to supporting and achieving the Governor’s vision.

Beyond WorkSource, WIBs facilitate the understanding, relationships and connections necessary to improve current practices, encourage innovation and enhance the value of public workforce efforts. While this work certainly informs WorkSource, the broader outcome is to support a sustainable, systemic approach to workforce development that addresses the regional and statewide challenges of the 21<sup>st</sup> Century economy.

Below is an outline of WIB roles and responsibilities and the support we need from State level partners to successfully perform these activities and fully implement the Governor’s and the Oregon Workforce Investment Board’s Strategic Plan:

<b>Workforce Investment Boards • Roles &amp; Responsibilities</b>	
<p style="text-align: center;"><b>WORKSOURCE OREGON</b></p> <ul style="list-style-type: none"> <li>• Promote Alignment of Service Delivery with the Workforce Development Strategic Plan</li> <li>• Invest Title I Resources to Support Identified Priorities at the State and Local Levels</li> <li>• Implement Back to Work Oregon</li> <li>• Oversee and Invest in the Re-Employment of Unemployed People</li> <li>• Negotiate MOU - Cost Sharing Agreements</li> <li>• Establish Eligible Training Provider List</li> <li>• Assure Integrated Service Delivery</li> <li>• Conduct WorkSource Center Certification and Oversight</li> <li>• Support Continuous Improvement</li> <li>• Implement the National Career Readiness Certificate for WorkSource Oregon Customers</li> </ul>	<p style="text-align: center;"><b>WORKFORCE SYSTEM</b></p> <ul style="list-style-type: none"> <li>• Provide Regional Leadership</li> <li>• Create Regional Strategic Workforce Plans</li> <li>• Provide Industry and Workforce Intelligence</li> <li>• Conduct Business &amp; Community Outreach/Engagement</li> <li>• Identify Sectors and Support Sector Strategies</li> <li>• Evaluate, and Promote Learning &amp; Best Practices</li> <li>• Pursue and Promote Program Alignment</li> <li>• Conduct Resource Development activities</li> <li>• Educate, Inform &amp; Influence</li> <li>• Communicate Workforce Needs</li> <li>• Identify and Implement System-Wide &amp; Sector Investments</li> <li>• Create Linkages with Economic Development</li> <li>• Support Continuous System Improvement</li> <li>• Promote NCRC</li> <li>• Implement Work Ready Communities</li> <li>• Convene Business and Industry to Identify and Address Workforce Needs</li> </ul>
<p style="text-align: center;"><b>SUPPORT NEEDED</b></p> <ul style="list-style-type: none"> <li>• Funding for Services</li> <li>• Encourage Co-location of Partners</li> <li>• Assist in Defining Partner Roles and Commitment to Integrated Service Delivery</li> <li>• Responsiveness to Plan Goals &amp; Objectives</li> <li>• Allegiance/Commitment to the WorkSource Oregon Model</li> </ul>	<p style="text-align: center;"><b>SUPPORT NEEDED</b></p> <ul style="list-style-type: none"> <li>• Funding for Workforce System Coordination, Convening, Planning and Evaluation</li> <li>• Support for the Role of WIBs as Leaders, Conveners, Planners, and Evaluators</li> <li>• Allegiance/Commitment to the WorkSource Oregon Model and Comprehensive Workforce Planning</li> </ul>

### DASHBOARD - WORKSOURCE ROGUE VALLEY (Draft)

		QE 9/30/16		QE 12/31/16		QE 3/31/17		QE 6/30/17		Unduplicate d YTD Total
		#	%	#	%	#	%	#	%	
		<b>Total YTD Job Seekers</b>		4307						1892
Workshops		Foundational Skills Workshop Completers		136	7%					
		NCRC Completers		167	9%					
		Occupational Skills Workshop Completers -- ResCare Online Modules		51	3%					
		Computer Training Completers		37	2%					
		<b>Total Unduplicated Workshop Completers</b>		<b>391</b>	<b>21%</b>					
Total Training & Job Placements	Training Investments Job Placements	On-the-Job Training Completers		13 / 15	87%					
		Work Experience/Internship Completers		29 / 47	62%					
		Short Term Skills Training Scholarships		23	1%					
		Customized / Enhanced Job Listings		9						
		Job Placements		333	18%					
Sector Strategy Industries	Training Investments Job Placements	On-the-Job Training Completers		8 / 13	62%					
		Work Experience/Internship Completers		29 / 47	62%					
		Short Term Skills Training Scholarships		18	1%					
		Customized / Enhanced Job Listings		8						
		Job Placements		92	5%					
In-Demand Occupations	Training Investments Job Placements	On-the-Job Training Completers		4 / 13	31%					
		Work Experience/Internship Completers		0 / 47	0%					
		Short Term Skills Training Scholarships		5	0.3%					
		Customized / Enhanced Job Listings		1						
		Job Placements		17	1%					
Other Trainings and Job Placements	Training Investments Job Placements	On-the-Job Training Completers		1 / 13	8%					
		Work Experience/Internship Completers		0 / 47	0%					
		Short Term Skills Training Scholarships		0	0%					
		Customized / Enhanced Job Listings		0						
		Job Placements		224	12%					

2015-2016 District 8 JOBS Dashboard												Current % of Yr Goal (When we're at)	
July	August	September	October	November	December	January	February	March	April	May	June	Year	Current % of 80% of Goal
District TANF Caseload Size	5024	5135	5230	5178	5169	5079	4844	4860	4842	4849	4893	5,023	
Mandatory #'s	4763	4800	4872	4847	4804	4741	4616	4617	4594	4615	4647	4,729	
Increase in Mandatory's		37	72	-25	-28	-63	-125	1	-23	21	32	-116	
<b>District Activity &amp; Participation by Month</b>													
Target % of Contract	8.33%	16.66%	25.00%	33.33%	41.66%	50.00%	58.33%	75.00%	83.33%	91.65%	100.00%		
JOBS Supp.Serv \$Allocated	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 118,780	\$ 1,425,354	
Support Services Spent	\$150,594	\$149,597	\$163,818	\$144,458	\$112,217	\$108,899	\$117,099	\$129,999	\$131,035	\$131,257	\$118,738	\$1,580,433	111%
Supported Work Goal: 150 Mo. (Contract Yr: 1800)	149	173	196	178	210	163	156	158	164	153	185	2059	142.99%
# of New SW Participants (480)	83	94	124	110	95	72	80	72	73	51	58	991	
SOGI Job Search 140 Mo. (Cont. Yr: 1680)	93	75	42	21	35	28	59	16	6	88	22	503	30%
# of New Job Search Participants	69	56	49	49	65	37	31	30	2	11	6	418	
Work Experience Goal: 160 Mo. (Contract Yr: 1920)	98	80	105	119	100	99	122	126	122	92	97	1278	66.56%
# of New WE Participants	35	39	53	47	40	36	57	52	48	38	44	541	
WSO Clerical Interns (Included in WE's mo. #)	0	10	7	4	3	6	4	9	4	4	4	61	
# of New Clerical Participants	0	10	0	3	0	4	0	5	3	4	0	29	
# Placed in Clerical Field	0	0	3	0	0	0	1	0	0	0	1	5	
WSO Health Care Interns (Included in WE's mo. #)	11	5	10	13	3	6	10	0	12	4	12	104	
# of New Health Care Participants	0	2	10	3	0	6	10	0	12	4	7	72	
# Placed in HC Field	0	0	0	0	0	2	0	0	0	2	0	5	
Teen Coordinator Services 50 Per Month (Contract Yr: 600)	36	40	45	46	43	43	35	45	51	51	50	540	90.00%
# of New Teen Participants	3	7	7	7	1	4	3	13	4	3	3	65	
# of TANF Mandatory's Teens	32	30	35	31	22	24	28	32	29	25	23	333	
Teens that Met Participation	19	18	21	19	15	14	14	17	19	19	14	208	
Teens Completing Diploma/GED	1	0	0	0	0	1	1	2	1	1	0	7	
WSO Job Search (250 mo) (Yr: 3000)	169	124	146	136	119	120	171	157	152	124	135	1679	120.50%
# of New Job Search Participants	83	48	75	62	63	52	88	69	75	63	72	802	150.63%
WSO Life Skills Activity	113	115	133	116	85	108	148	179	241	244	235	1936	
# of New Life Skills /TJC (Included in JO #'s)	71	64	68	60	46	64	82	96	113	115	97	985	
JOBS Plus 38 a Mo. (Con. Yr: 456)	18	12	16	14	12	12	13	16	30	30	28	230	50.44%
# of New JOBS Plus Participants	4	3	4	0	3	2	3	7	4	7	7	59	
NCRC/TANF - Completers (25)	15	11	13	11	13	14	70	17	24	16	13	232	
# Completed w/Silver & Above	13	6	11	8	11	10	53	15	13	13	11	177	
Voc. Training (VT) # In Step	57	52	38	41	51	37	41	48	64	45	34	47	
# of New VT's	13	4	6	6	9	0	13	8	12	6	2	98	
# Completed VT (or VT ended)	0	0	0	0	0	0	0	3	3	1	3	11	
# Placed in Field	0	0	0	0	0	0	0	0	0	0	0	1	
FS&C # of Families Served (219)	56	53	50	47	54	47	48	50	56	53	63	630	287.67%
# of New Referrals	16	13	14	23	26	24	20	17	31	26	25	261	360.00%
FS&C # of Contact Hours Monthly (Con. Yr: 2851)	302	190	216	283	156	273	290	277	308	299	332	3291	115.43%
REACH Ed Grant # Served (Con. Yr 75)	0	0	0	0	0	0	0	24	40	48	55	201	244.32%
# of New Educational Grants	0	0	0	0	0	0	0	24	6	8	22	70	335.00%
# of Completers	0	0	0	0	0	0	0	0	1	2	7	11	
# Placed in Field	0	0	0	0	0	0	0	0	1	2	0	4	
SOHOPE - HC # Served (Con. Yr: 29)	0	0	0	0	0	0	0	0	9	12	19	43	148.28%
# of New SOHOPE	0	0	0	0	0	0	0	0	5	7	3	18	
# of Completers	0	0	0	0	0	0	0	0	0	0	0	0	
# Placed in Field	0	0	0	0	0	0	0	0	0	0	0	0	
Housing Spec. # in Housing(25) (Yr: 300)	2	5	5	5	7	7	11	11	15	15	13	111	37.00%
# of New Placed in Housing	0	3	0	0	2	1	4	0	1	1	0	17	46.25%

# Workforce & Education System • Performance Overview

## The Workforce Pipeline • Program Year July 2012 to June 2013




**Southern Oregon University**

- 8599 Enrolled | 21 Degree Programs
- Early College: 3,069 High School Students



**Rogue Community College**

- Total Headcount: 16,636
- Associate Degree & Credit Transfer Courses: 9,248
- Career Technical Education Courses (CTE): 6,449
- Developmental Education: 5,166
- Workforce Training Courses: 3,772
- Adult Basic Education: 1,123
- English as Second Language: 348
- Small Business Development Center: 218



**WorkSource Oregon • The Job Council • One-Stop Centers**

- Total Job Seekers: 30,458 | 27,338 Employed
- Completed Skills Review: 19,524
- Employment Workshops: 3,950
- Intensive & Training Services: 2,677
- Computer Training: 577
- Occupational Skills Training: 207
- On-the-Job Training: 51
- TANF/JOBS clients: 2,118 | Internships: 505 | JOBS Plus: 96
- SNAP / OFSET Employment: 4,442



**PowerUp Academy**

- 860 Training Experiences | 611 Trainees | 50 Trainings | 112 Businesses Served



**State of Oregon – Bureau of Labor & Industry**

- 233 Active Apprentices | 47 Completed Apprenticeships



**Oregon Department of Human Services**

- TANF/JOBS Program: 794 Trained | Employed: 720 | Avg. Wage: \$9.97
- SNAP / OFSET Emp. Program: 3,780 Served
- Vocational Rehabilitation: 451 Eligible | 325 Service Plans | 194 Employed
- Commission for the Blind: 37 Served | 24 Trained | 5 Employed



**Southern Oregon Goodwill Industries**

- 610 Trained | 255 Employed (included in DHS count) | Avg. Wage \$9.71



**U.S. Department of Veterans Affairs**

- PY '12-13 Data Unavailable
- PY '11-12: OEF/OIF Programs: 2,321 | Unique Veterans Seen: 1,039



**Easter Seals – Homeless Veterans Program**

- PY '12-13 Data Unavailable

**Organization of Forgotten Americans**

- 17 Served | 5 Retained Employment

**Abdill College** | **Experience Works**

- Data Unavailable
- Data Unavailable



**JUNIOR ACHIEVEMENT**

- 4,632 High School Students Served | 350 @ Careers in Gear

**HIGH SCHOOLS in Jackson & Josephine Counties**

- 11,210 Students

# DRAFT ONLY

## FINANCIAL DATA FOR LOCAL IMPLEMENTATION PLANNING

### Resource Inputs by Region

Program Year 2012 (July 1, 2012 – June 30, 2013)

AGENCY/DEPARTMENT/PROGRAM/FUNDING SOURCE	TOTAL \$\$ ALL REGIONS	TOTAL FTE ALL REGIONS	TOTAL #S SERVED ALL REGIONS	STATE-LEVEL COST
<b>CCWD</b>				
WIA Title 1B/DOL *(See Footnote 2)	\$29,647,987.16	78.42	51,187	\$5,299,387.00
WIA Title II/DOE	\$4,777,728.00	0	17,682	\$767,378.00
Department of Corrections	\$88,700.00		3,172	
Youth Conservation Corps	\$1,282,640.01	0	1,300	\$325,083.00
<b>Separate Grants</b>				
- NEGS	\$0.00	0	0	\$0.00
- Other	\$0.00	0	0	\$0.00
<b>TOTAL</b>	<b>\$35,797,055.17</b>	<b>78.42</b>	<b>73,341</b>	<b>\$6,391,848.00</b>

<b>OED</b>				
<b>Business and Employer Services</b>				
Employment Service				
- WIA Title III Wagner-Peyser/WIA Title I-	\$5,499,493.00	66	550,873	\$188,089.00
- SEDAF	\$16,821,982.00	201	0	\$574,342.00
WIA Title I-D/DOL Vets	\$0.00	24	0	\$2,325,000.00
<b>Separate Grants</b>				
- Trade Adjustment Assistance (TAA)	\$0.00	0	0	\$11,385,137.00
- Other	\$0.00	0	0	\$0.00
<b>TOTAL</b>	<b>\$22,321,475.00</b>	<b>291</b>	<b>550,873</b>	<b>\$14,472,568.00</b>

<b>DHS</b>				
WIA Title IV - Vocational Rehabilitation *(See Footnote 1)	\$28,820,587.25	208	15,550	\$218,643.00
Commission for the Blind	\$5,573,385.00	47	699	\$501,604.65
Older Americans Act/Title V - SCSEP *(See Footnote 5)	\$3,528,017.00	7	656	\$32,584.00
TANF/JOBS *(See Footnote 3)	\$10,978,387.00	171	233,040	See Footnote 3
Food Stamp Emp. Program (SNAP) *(See Footnote 3)	\$2,414,419.00	26	63,730	See Footnote 3
<b>Separate Grants</b>				
- Developmental Disabilities "Employment 1st Training and Technical Assistance" *(See Footnote 4)	\$0.00	0	0	\$400,000.00
- Other	\$0.00	0	0	\$0.00
<b>TOTAL</b>	<b>\$51,314,795.25</b>	<b>459</b>	<b>313,675</b>	<b>\$1,152,831.65</b>

<b>BOLI</b>				
Registered Apprenticeship	\$0.00	0	0	\$1,295,979.00

<b>All regions - Total: other significant local resources</b>	<b>\$0.00</b>	<b>0.00</b>	<b>0</b>	<b>\$0.00</b>
---	---------------	-------------	----------	---------------

<b>TOTAL ALL REGIONS</b>	<b>\$109,453,325.42</b>	<b>828.30</b>	<b>937,669</b>	<b>\$23,313,226.65</b>
--------------------------	-------------------------	---------------	----------------	------------------------

Data for Local Implementation Planning DRAFT



**From:** HUMELBAUGH Karen M \* CCWD [mailto:Karen.M.HUMELBAUGH@oregon.gov]  
**Sent:** Friday, December 2, 2016 12:29 PM  
**To:** Andrew McGough <amcgough@worksystems.org>; Heather Ficht <heather@eastcascadesworks.org>; Heather DeSart <heather@onwib.org>; 'Tony Frazier' <tfrazier@inciteworks.org>; Jim Fong <JimF@rogueworkforce.org>; Jake McClelland <JMcClelland@sowib.org>; bill@easternoregonworkforce.org; Bridget Dazey <Bridget.Dazey@clackamasworkforce.org>  
**Cc:** K Litvin <klitvin@prjmasters.com>; James Pfarrer <james.f.pfarrer@oregon.gov>; HAUN DANIEL R <daniel.r.haun@state.or.us>; Pete Karpa <pete.karpa@state.or.us>; CRANE Patrick <Patrick.Crane@state.or.us>; GERSTENFELD David K \* OED <David.K.GERSTENFELD@oregon.gov>  
**Subject:** FW: Budget Message Forward

All-

The following is a message from Ben Cannon, Executive Director at the HECC. It provides information on the Governor’s budget release yesterday and its impact on higher education and workforce programs in Oregon.

Questions particular to the workforce portions of the budget can come my way. I will also be available for conversation at next Thursday’s meeting.

Thanks. k

**KAREN M. HUMELBAUGH**  
 Office of Workforce Investments  
 503.551.9322

---

HIGHER EDUCATION COORDINATING COMMISSION  
 875 Union Street NE, Salem, OR 97311

=====

This morning Governor Brown released her 2017-19 recommended budget. This document serves as a starting point for the legislative deliberations that will follow, and will be the basis of the HECC agency’s budget presentation and advocacy to the Legislature. The Legislature and Governor are expected to adopt their final 2017-19 budget, which may deviate significantly from this proposal, by June, 2017.

As you know, we are entering a challenging period for the state’s general funds and lottery funds (GF/LF) budget, and a period of considerable uncertainty about federal funds. The cost of maintaining current state programs and operations (referred to as the “Current Service Level” or CSL) is projected to exceed state revenues by \$1.7 billion GF/LF during the 2017-19 biennium. That deficit, which represents 8% of state’s the total GF/LF budget, will force the Governor and Legislature to make cuts to existing programs and/or raise new revenue. The Governor’s recommended budget includes a combination of both.

The Governor’s recommendations for the higher education and workforce budgets reflect the priorities the HECC established in its Agency Request Budget (ARB). She is proposing to increase the Oregon

Opportunity Grant, our state's only need-based financial aid program, by \$5 million above CSL, and to sustain the Oregon Promise for the entire biennium, at a cost of \$20 million above CSL. These proposed increases, in an era of significant cuts to the overall state budget, are concrete expressions of the Governor's commitments and priorities.

While the Governor's budget shields our institutional partners from the deeper cuts that many agencies and programs may receive, community colleges, public universities, and the students they serve would face challenges at these funding levels. For the community college support fund, the Governor recommends a \$550.0 million appropriation; for public university support fund, the Governor recommends \$667.3 million. These are identical to 2015-17 funding levels and represent 2.5% and 3.8% reductions in current service level terms. If adopted, these funding levels would almost certainly result in significant tuition increases at all institutions.

Although the HECC's Office of Workforce Investment is primarily funded by federal funds, in the current 2015-17 biennium it received \$8.2 million GF for payments to providers for National Career Readiness Certificates, Back-to-Work Oregon, and other workforce activities. The Governor's budget proposes cutting those payments to \$7.5 million.

Finally, the Governor is recommending what is essentially a status-quo budget with respect to our agency's operations. She recommends continuing to fund all permanent positions that are in our current, 2015-17 budget. In addition, she has endorsed our requests to create and fund new Internal Auditor and Human Resources positions, and she has endorsed a portion of our request for significant, one-time funding to upgrade OSAC's financial aid data system (FAMIS). While her budget recommendation does not fund the majority of the other requests the HECC made for new funding, I consider it a high tribute to our Commission and its staff that she is recommending continuing to fund all of our agency's current, permanent positions and programs in spite of the overall budget deficit facing the state and the very significant cuts, including some layoffs, that her recommended budget proposes for some other agencies.

The development of the GRB is a long, laborious process that began with the HECC Strategic Plan and the ARB that the Commission adopted in August. In addition to the overarching efforts and priorities that the Commission has established, it has required an extraordinary amount of work by agency staff. We owe a particular debt of gratitude to the Agency's operations team including Dave Zerbe, Lora Carson, Susan Violette, and Tyna Moriarty.

We will be providing more detail and perspective on the GRB at our full Commission meeting next Thursday.

Best,



BEN CANNON  
*Executive Director*

---

HIGHER EDUCATION COORDINATING COMMISSION | Office: 503-378-5690  
775 Court Street NE, Salem, OR 97301 | [www.oregon.gov/highered](http://www.oregon.gov/highered) | [Sign up for HECC updates.](#)

[http://www.oregonlive.com/politics/index.ssf/2017/01/legislature\\_special\\_session.html](http://www.oregonlive.com/politics/index.ssf/2017/01/legislature_special_session.html)

## Legislature could be forced into special session over budget fight, Senate president says

[Anna Marum | The Oregonian/OregonLive](#)

on January 24, 2017 at 9:59 AM, updated January 24, 2017 at 7:01 PM

In emotional remarks Monday, Oregon Senate President Peter Courtney mourned the loss of Oregon leaders' ambition and work ethic and said he expects the Legislature will need a special session to balance its next budget.

"We have until midnight July 10," the longtime leader of the state Senate told The Oregonian/OregonLive editorial board. "If we don't balance the budget by then, we have to come back. In my opinion, we're going to be here all summer."

House Speaker Rep. Tina Kotek, D-Portland, also present at the interview, was more optimistic about filling the \$1.8 billion budget hole in what she called "one of the most challenging sessions" legislators have faced in a long time.

Just shy of three-fifths supermajorities in the House and Senate, Democrats will need at least a few Republican votes to raise revenue.

It has been evident for months that the 2017 session would be a challenging one, with Republicans and Democrats differing over the best way to find stability for state programs and services - with the former favoring [disciplined spending and public pension cutbacks](#) and Democrats hoping for tax increases, particularly on corporations.

Just how tough a haul it would be for Democrats became clear when voters [decisively defeated](#) the Measure 97 corporate tax hike in November.

Kotek said she hopes to fill the deficit - at least in part - with a tax on corporations' gross receipts, a similar mechanism to that called for under Measure 97.

A Democratic senator has proposed a plan centered on such a tax. But Kotek said she's struggled to bring labor and business interests to the same table to talk about a revenue package.

A sales tax is unlikely to pass in Oregon, and taxes on tobacco products or liquor don't generate enough money to fill the budget gap, Kotek said.

"Really the only option left to us is corporate taxation," she said.

Courtney, a Salem Democrat, dismissed the budget proposed by Gov. Kate Brown, suggesting her plans to raise taxes and other revenues to avoid some program cuts won't fly.

"The governor's budget is not a budget," he said. "You're not going to get seven taxes passed."

Chris Pair, a spokesman for Brown, said the governor is "actively holding discussions with legislators, business leaders, and advocates and looks forward to working with them" on a long-term solution that addresses Oregon's "unstable, inadequate, and fundamentally out of balance" tax system.

The [budget framework](#) proposed Thursday by the Ways & Means co-chairs, which included no new revenue and called for raising K-12 class sizes and cutting 355,000 people off Medicaid, is a better place to start budget conversations, Courtney said.

While Republican lawmakers say they're open to revenue packages and Democrats accept that the budget will ultimately include cuts to programs and services, public employee pension reform is sure to be a sticking point.

Republicans have made it clear they won't enter serious talks about raising taxes if significant moves to decrease Public Employee Retirement System costs aren't part of the deal. But during Monday's back-and-forth, Courtney and Kotek said they see no way to accomplish big PERS savings.

The Oregon Legislature hasn't been forced into a lengthy special session over its budget since 2002, when lawmakers were repeatedly gaveled back in to rewrite the state's 2001-03 budget to try to fix a nearly \$2 billion shortfall caused

by the 2001 recession. Those efforts ultimately failed, and Oregon became the subject of a national joke when Hillsboro schools cut 17 days off the school year.

(Lawmakers also held a pre-orchestrated [three-day special session late in 2013](#) to approve a so-called "grand bargain" to trim PERS, eliminate \$200 million in tax cuts and send that money to schools.)

In a statement issued Monday to underscore the importance of addressing pension costs this year, Senate Republican spokesman Jonathan Lockwood warned that the pension system's liability puts Oregon's credit rating at risk.

"If the Democrat-controlled legislature fails to diffuse the PERS bomb, and our state credit rating is hit, vulnerable Oregonians will pay the price," he wrote.

Republicans have [proposed two measures](#) to address the fund's \$22 billion unfunded liability, but Kotek dismissed them as unworkable Monday. Both Kotek and Courtney were reluctant to talk about pension reform or to label the ballooning unfunded liability a big problem.

"I don't think there's a viable option at this point," Kotek said. "You can't talk about PERS without talking about revenue. It's not an either/or situation."

Republicans such as Rep. Cliff Bentz, R-Ontario, say they're ready to consider taxes when Democrats offer permanent spending cuts.

"I'm ready to talk revenue," he said. "I really am. And so is my caucus. But we need to see what they do on the other side of the ledger. Cuts here, cuts there is not reforming spending. That's running around trying to douse a fire."

Bentz, a vice chair on the House revenue committee, said he's open to a revenue proposal like the one proposed by Sen. Mark Hass, D-Beaverton.

Hass' plan - [a version of which](#) failed last year - calls for a .26 percent tax on gross receipts for companies pulling in more than \$5 million per year in sales (though any details have yet to be finalized). It would also cut income taxes for middle-class taxpayers by half a percent, and would generate between \$500 million and \$800 million each year, he said.

Unlike Measure 97, he said, his plan would benefit the economy. That is because the tax cuts would put more money in consumers' pockets, and businesses would benefit from that extra spending, he said.

But Hass, who chairs the Senate's revenue committee, says he's under no illusion that new revenue alone will balancing the budget.

First, he said, the Legislature needs to tackle pension reform, and make cuts to spending.

"Maybe if those things fall into place, we can have a tax plan to raise some revenue," he said.

In crafting the budget, lawmakers will have to be willing to make sacrifices, Hass said.

When asked about the likelihood that a special session will be needed to reach an agreement, Hass said he wasn't sure.

"I'm more optimistic than Peter is, but I don't think he's that far off," he said. "There does seem to be a lack of urgency here."

Urgency, Courtney said, is exactly what Oregon is missing. In an impassioned appeal, Courtney said Oregon has lost its way in recent years and lacks the leadership to get back on track.

"We just don't want it," he said repeatedly, mourning the loss of an Oregon that was the "first and only" in testing out new policies. "We're on our way to becoming just another state. Another friggin' state."

-- Anna Marum

[amarum@oregonian.com](mailto:amarum@oregonian.com)

503-294-5911

[@annamarum](#)



KATE BROWN  
Governor

December 7, 2016

Bridget Dazey, Clackamas Workforce Partnership  
Heather DeSart, Oregon Northwest WIB  
Heather Fitch, East Cascades WIB  
Jim Fong, Rogue Workforce Partnership  
Tony Frazier, Incite Incorporated  
Andrew McGough, Worksystems Inc.  
Jake McLelland, Southwestern Oregon WIB  
Kristina Payne, Lane Workforce Partnership  
Bill Rosholt, Eastern Oregon WIB

Dear Oregon Workforce Investment Executive Directors and CEOs,

Over the past two years I've seen first-hand a wide range of programs that help Oregonians find good jobs and new careers. Efforts by both the public Workforce System and by individual businesses investing in their own workforce are changing lives and increasing our competitive edge. Despite this progress, too many Oregon families continue to live in poverty.

Earlier this month I announced that my priorities are protecting services for children and lifting families out of poverty. The workforce system plays an important role in this work. I will continue to ask all of our State Agencies to pay attention to communities who are frequently underserved – communities of color, our rural communities, and families in poverty. Based on these priorities, we must sharpen our focus. I'm asking all partners in the workforce system to evaluate current and future programs using the following questions:

- Are our investments putting job seekers on a trajectory to break the cycle of poverty and will they need additional services when a job ends? Oregonians seeking services through our workforce system should continue to be placed into high wage, high demand jobs. Where this is not feasible, resources should be spent on getting individuals in jobs with robust training, a clear career ladder, and advancement opportunity; and
- Is this the type of business we want to grow in our state? Is this business investing in their own workforce? Are they in a Strategic Sector, a Business Oregon Target Industry Group, or a Talent Plan industry? Businesses seeking public dollars should invest in workforce training, not just rely on public support, and they should be part of our state plan for long term economic growth.

We must ensure state-funded programs set Oregonians on a path out of poverty, focus on key job and industry sectors, and align federally funded programs to Oregon's goals.

**254 STATE CAPITOL, SALEM OR 97301-4047 (503) 378-3111 FAX (503) 378-8970**  
**WWW.GOVERNOR.OREGON.GOV**



Workforce Investment Executive Directors & CEOs

December 7, 2016

Page 2

I am asking all Workforce Investment and Opportunity Act partners, agency staff leading the integration of workforce programs, and Local Workforce Boards, to provide feedback to my Workforce Policy Advisor by January 6<sup>th</sup> on what changes can be made to better focus our workforce dollars on lifting families out of poverty and strategically growing our economy. Feedback should include fiscal, legislative, or federal barriers to achieving these goals. I plan to meet with the Oregon Workforce Investment Board on December 9<sup>th</sup> and look forward to receiving their feedback as well.

We know that individuals seeking assistance often come from families with multiple, complex needs and require the services of more than one state program. For this reason, integration of services between agencies and across public and private partners must remain a priority.

I envision an Oregon where our public workforce system and private partners help all workers move up their career ladders, giving them the tools to succeed well beyond their next job and making room for entry level and young workers who enter the workforce behind them. Thank you for your commitment to this effort. Together, we can create an Oregon where all can thrive.

Sincerely,

A handwritten signature in black ink, appearing to read 'Kate Brown', with a long horizontal flourish extending to the right.

Governor Kate Brown

KB:epg



January 5, 2017

Governor Kate Brown  
900 Court Street NE  
Salem, OR 97301

Dear Governor Brown:

Thank you for the call for an evaluation of current and future workforce programs and affording us the opportunity to provide feedback on barriers to increased system effectiveness, as well as suggestions for better focusing state resources to meet its identified priorities. As the leaders of Oregon's nine Local Workforce Boards (LWBs), we provide leadership that promotes and advances Oregon's workforce system. We are excited to help you build a comprehensive system that supports better alignment of resources, increased coordination among programs, and improved efficiency and effectiveness in service delivery to all Oregonians.

The Oregon Workforce Partnership (OWP) shares your vision that Oregon's workforce system ensures all Oregonians possess the talent needed for communities to thrive and prosper. This letter contains input from stakeholders across Oregon's nine local workforce areas and represents a collective response to the questions you've raised.

#### **LIFTING FAMILIES OUT OF POVERTY**

Q: Are our investments putting job seekers on a trajectory to break the cycle of poverty and will they need additional services when a job ends?

#### EVALUATION

We believe the structure of **Oregon's current workforce system continues to promote a programmatic rather than systemic approach** to workforce development. While Oregon has had considerable success in integrating several federal, state and local programs, there is much work to be done. Our efforts are putting job seekers on a trajectory to break the cycle of poverty, however, we are not doing so in a coordinated and effective way to meet the needs of individuals. A systemic approach is essential in order to do more in an environment of diminishing resources, and improve outcomes for Oregonians facing poverty or other barriers to success.

Through the Workforce Innovation and Opportunity Act (WIOA) **we have an unprecedented opportunity to better serve Oregonians** by implementing a unified, integrated system rather than a series of separate, disconnected programs. We consider Oregon's primary workforce service delivery network—WorkSource Oregon (WSO)—to be the mechanism by which to further build the integrated system.

Currently, there are 41 WSO centers statewide. WSO provides high-quality services to individuals and businesses, resulting in job attainment, retention and advancement. Last year, **WSO served 109,402**

**Oregonians and placed more than 80,000 into jobs. These workers earned almost \$1.1 billion** in the first six months after employment and **85% were still employed nine months later.** While Oregon represents only 1.25 percent of the population nationally, we represent 14 percent of all job placements nationwide for adults and dislocated workers served under the WIOA Title I program. In other words, we have excellent performance in job placement as compared with other state one-stop systems. This success reflects the benefits of working together and the impact of serving shared customers among multiple programs.

**WorkSource Oregon is a place where low-income, unemployed, undereducated, underserved Oregonians go to build skills and find work.** Of those served last year:

- 44,793 were in need of public assistance to care for and feed their families.
- 13,773 lacked a high school diploma or GED.
- 8,527 were veterans.
- 6,805 were people with disabilities.

While the economy has improved for many Oregonians, many continue to struggle. **The recent changes in the economy have left less educated workers further behind and increasingly unable to secure work at family-supporting wages.** Demographic data of the people served last year by WSO illustrates the challenges faced by our customers. It also shows the need to integrate additional programs into the WSO service delivery network—especially programs that primarily serve low-income, underserved and vulnerable populations.

<b>*Characteristics of New WSO Enrollments July 1, 2015- June 30, 2016</b>					
Unemployed	52,071	48%	Ages 18-29	25,202	23%
People of Color	26,069	24%	Age 55+	21,795	20%
Less than HS Education	13,773	13%	Disabled	6,805	6%
Public Assistance	44,793	41%	Ex-Offender	8,021	7%
-Food Stamp Recipients	35,896	33%	Homeless	5,123	5%
-General Assistance/SSI/SSDI	3,532	3%	Limited English Proficient	5,395	5%
-TANF	5,365	5%	Exhausted Unemployment	2,957	3%
<b>Veterans</b>	<b>8,527</b>	<b>8%</b>			

\*This data is gathered via self-attestation from WSO customers, and under reports *actual* demographics. See “Lack of Shared Data Systems” below for more information.

**WSO has done substantial work** to develop consistency in a customer-centered approach to service delivery across all WSO centers. We have aligned partner resources across multiple programs, including WIOA Title I (LWBs Adult, Dislocated Worker and Youth), and Oregon Employment Department (Title III Wagner-Peyser/Labor Exchange, Trade Adjustment Assistance, Unemployment Assistance, Veterans Employment Programs, and Migrant and Seasonal Farm Worker) services. This alignment has helped us **more effectively put low-income job seekers on a trajectory to break the cycle of poverty.** Through further alignment of resources through WSO, and increased state investment, we can have an even greater impact for more Oregonians.

We agree that where placement in high-wage, high-demand jobs is not feasible for Oregonians when seeking services through our workforce system, resources should be spent on getting individuals into jobs with robust training, a clear career ladder, and advancement opportunity. The programs that provide workforce training in the WSO centers are not strategically aligned with the programs providing the additional social supports and case management necessary to ensure these customers are successful in continuing to advance.

**Yes, Oregonians need additional supports and services when a job ends.** Of increasing urgency to businesses and job seekers are the lack of **affordable housing and affordable child care** which prevent people from going to work, keeping their jobs, and/or attending training. Once they leave a job, these expenses become even more of an obstacle to pursuing the type of job training that will ultimately put them on a career pathway out of poverty.

Rural Oregon communities require additional services as well, particularly around reliable public transportation and access to one-stop services through WSO. Reliable transportation is necessary for people to be able to work. **There is a lack of reliable public transportation amongst our rural communities affecting people's ability to access resources, training or work.** Some communities do not have the capacity or resources to conduct proper transportation planning to tackle the transportation barriers they face. Additionally, we need strengthened efforts to ensure that our rural WSO centers are as comprehensive as possible so that when people do travel to WSO, they can access the wrap-around services they require to be successful. **We have some excellent models of local workforce development initiatives taking place in rural Oregon that need additional resources to grow and sustain.**

## BARRIERS

1. **Lack of Funding:** Currently, the federal funds that primarily support the training of individual jobseekers through WSO are **meeting only 2 percent of the need.** Relying on federal investment alone limits our ability to serve Oregon's jobseekers, working learners and businesses; and to achieve the goals set forth by the Governor and the Oregon Workforce Investment Board (OWIB). In an environment of decreasing resources and increasing need, **we need additional state investment** in order to maintain and increase levels of service.
2. **Lack of Shared Data Systems:**
  - We **cannot readily identify shared customers** while we are providing services to them unless they voluntarily disclose that they are being served by another workforce program. This results in duplication of services, lack of coordination, and inefficiencies for customers.
  - Because we don't know who shared customers are, **we do not know the impact of our programs.** For example, we want to know how many customers come into WSO on public assistance, receive job training and/or other workforce services that result in them getting off public assistance. This is a story we would like to tell. Unfortunately, we can't because we don't know what services our shared customers are receiving.
  - The Performance Reporting and Information System (**PRISM**) **does not yet report for all core WIOA programs.**
  - The institutional processes for technology development within state agencies **prevent us from being responsive as a system** and getting data systems modified to support our work in a timely manner.

3. **Lack of Training Capacity:** Where we have the jobs (entry-level healthcare, for example), we don't have people to fill the jobs. **We can't fill the jobs because we don't have enough capacity in the training programs that certify the workers.**
4. **Lack of Ability to Respond to Training Needs:** In addition, we need to increase the ease by which our community colleges can develop and implement certificate programs to meet business demands. The agency policy restrictions that unintentionally impede the development of these programs limit our ability to respond to local workforce needs.
5. **Lack of Affordable Housing:** As mentioned above, the lack of affordable family housing and/or short-term housing in many communities keeps people from being able to relocate permanently for a better job or when offered a job at the completion of a work-based training program.
6. **Lack of Affordable Child Care:** The expense of child care prevents people from being able to afford to work or go to school.

## **STRATEGICALLY GROWING OUR ECONOMY**

Q: Is this the type of business we want to grow in our state? Is this business investing in their own workforce? Are they in a Strategic Sector, a Business Oregon Target Industry Group, or a Talent Plan industry? Businesses seeking public dollars should invest in workforce training, not just rely on public support, and they should be part of our state plan for long term economic growth.

## EVALUATION

We believe that business services in Oregon's workforce system is another example of a programmatic rather than systemic approach. Virtually all workforce programs are making connections with businesses yet **how we engage with those businesses is not coordinated, nor is our approach strategic.**

Under section 107 of WIOA, **LWBs are charged with leading employer engagement** to promote business representation, develop linkages, implement effective strategies (sectors), and ensure workforce investments support the needs of businesses. **Our investments in workforce solutions are demand-driven: they are based on the needs of business.** Our sector priorities are based on data first—considering potential growth, wages, the concentration of an industry in a given geographic area, as well as readiness and need of local businesses. Representatives of these priority industry sit on the LWBs, and further inform business-driven investments.

Not only do **113 private-sector businesses sit on our LWBs, we have direct relationships with 927 businesses in high-growth, living-wage occupations and industries** in our communities as part of our sector work and other partnerships. We utilize our relationships with these businesses, and the information we directly gather from them as result of those relationships to inform the investments we make in workforce solutions for adult job seekers, dislocated workers, and youth.

**An ongoing need for businesses is customized incumbent worker training.** A business or group of businesses has a need for workforce training that will result in job creation and/or retention as well as business retention and/or expansion. The LWBs invest funds in the training, either through sector initiatives or competitive grants, with a requirement that the business pay a portion of the training, pay the employees while attending the training and meet specific performance outcomes for training

attendance, employee retention, and job creation. This is an effective and **currently underutilized tool in much of the state.**

Under WIOA, local areas may only use up to 20 percent of adult and dislocated worker funds, and states may use their statewide activities and rapid response funds, for incumbent worker training. Incumbent worker training is a good way to up-skill entry-level employees, retain them, provide workers with an upward career path. It also opens entry-level positions, which is **an effective strategy to support moving people upward on career pathways and out of poverty.** Public/private partnerships such as these training investments are a good way to impact workforce challenges while ensuring that businesses seeking public support are investing in their own workforce.

**Innovative programs such as Back to Work Oregon (BTWO) are also moving people out of poverty** through public/private **partnerships among LWBs and employers where both partners make a direct investment** in the cost to provide the training. This Oregon investment has resulted in:

- A total of 2,552 on-the-job training (OJT) contracts with employers.
- Of state-funded OJT participants, 81 percent completed training and retained employment.
- 470 employers participated in the program statewide.

Currently, sector work is largely siloed, and LWB efforts are often disconnected from other statewide business initiatives. We find clear connections among much of our sector work and components of the Oregon Talent Plan. However, we have struggled to gain traction aligning the LWB industry sectors and Business Oregon Target Industry Groups. We believe that **the state economic development system needs to better align with local initiatives**, and support locally-driven business and economic development.

#### BARRIERS

1. **Lack of Resources:** We **need ongoing state investment** to support effective local sector work. Through local sector work, we can increase business investment.
2. **Lack of Employers Willing to Hire Ex-Offenders:** Many employers in Oregon are what we call “second-chance employers,” or those that are willing to hire ex-offenders. Particularly in our rural areas, **we need more second-chance employers or incentives for businesses to be second-chance employers.**

#### **SERVICES TO CHILDREN**

Currently, we provide workforce development services to children ages 14-21. **Oregon’s existing service delivery system served 1,164 low income youth, ages 14-21,** between July 1, 2015 and June 30, 2016.

- 866 were deficient in basic literacy skills
- 206 were in foster care, homeless or runaway youth
- 150 youth were either pregnant or parenting
- 167 were disabled
- 121 youth were ex-offenders

With limited federal resources available, 189 received occupational skills training, 431 participated in summer employment, and 630 were provided with a meaningful work experience in the last reporting year. Of youth served, 76 were successfully placed into employment and/or a post-secondary education program. **With additional investments into the existing system, we can do more to effectively connect young people to education, training and work.**

## BARRIERS

- 1. Lack of Resources for Youth:** Many youth ages 16 to 24 are not attached to either school or work. **Young people living in rural areas of Oregon have less access to work**, as well as fewer opportunities to gain early work experience and develop the skills needed to advance in school and the workplace. Youth who are engaged in summer work are taught from a young age the essential soft skills that grow with them into the adult workforce. The work experience and financial literacy training can help low-income individuals establish work history and credibility and move out of poverty. With decreasing federal investments, **we need state-funded programs for youth** summer employment projects as well as increased resources for paid internships.
- 2. Lack of Work Readiness Skills:** Many individuals coming into WSO are lacking work readiness and soft skills as adults. Increasingly, work readiness skills are not being taught or learned effectively. We have to get these skills to children early, not once they are adults and looking for work. **Work-readiness skills training needs to be better integrated into the K-12 curriculum.**
- 3. Lack of Regulatory Support:** Business face challenges creating jobs and work opportunities for youth. Some of these involve liability challenges and Bureau of Labor and Industry (BOLI) regulations. The minimum wage laws also impact youth training and employment. We need to eliminate these barriers and create policies that incentivize and support employers investing in youth training.

## **BETTER FOCUS OF WORKFORCE DOLLARS**

Q: What changes can be made to better focus our workforce dollars on lifting families out of poverty and strategically growing our economy?

Under WIOA, LWBs are charged with identifying and promoting proven and promising practices. **We have exceptional examples of promising practices across Oregon** from pipeline projects for youth to innovative engagement of rural high school students. Our local workforce boards consist of local stakeholders volunteering time and energy to create innovative workforce solutions for the communities in which they live and work. To maximize our effectiveness, we need to utilize the current system and ensure that as many resources as possible get to these local areas.

**We should continue to increase programs that leverage funding and coordinate services** across funding sources. Programs like the SNAP 50/50 program offer solutions to provide assistance to shared customers with complex barriers out of poverty. Above and beyond growing these promising programs, in light of Oregon's programmatic rather than a systemic approach to workforce development, **it may be time to think bigger.**

We are not the first state to face challenges to meet workforce needs in light of diminishing resources. **Other states have models that have proven effective** at increasing customer outcomes, reducing duplicative costs and services, and maximizing the existing service delivery system outlined under the law. **They are leading the way in building effective, integrated workforce systems.** Texas and Michigan have had great success substantially realigning the workforce system structure and increasing integrated service delivery among one-stop centers and human services employment and training programs.

### **Texas**

The Texas Workforce Investment Council (Council) was created to promote the development of a highly-skilled and well-educated workforce for the State of Texas, and to assist the Governor and the Legislature with strategic planning for and evaluation of the Texas workforce system. In addition to its responsibilities in state law, the Council serves as the state workforce development board under the federal Workforce Innovation and Opportunity Act of 2014. The Council does not operate programs, but uses an integrated, collaborative approach to facilitate planning and evaluation across workforce system partners, programs, and initiatives.

One of the Council's key responsibilities is the development of an overarching strategic plan for the Texas workforce system. Section 2308.104 of the Texas Government Code charges the Council to develop a "single strategic plan that establishes the framework for budgeting and operation of the workforce system." The Texas workforce system comprises the workforce programs, services, and initiatives administered by eight state agencies and 28 local workforce boards, as well as independent school districts, community and technical colleges, and local adult education providers. Due to the substantial shifts Texas has made in its approach to integrated service delivery and oversight, there has been significant progress toward all of the plan's long-term objectives as well as in system performance.

The Council reviews five components of system performance on an annual basis. Through the delivery of over 19 workforce education and training programs, state and local system partners served almost five million individuals in the last reporting year. Of those participating in workforce system programs and services, over 504,000 individuals completed a degree, certificate, or other measure of educational achievement. Over one million participants found and started a job and almost 930,000 more stayed in a job.

### **Michigan**

In Michigan, the Michigan Department of Talent and Economic Development (TED) passes funds through to the Administrative Agent, Michigan Works! The Michigan Works! System is the first unified workforce development system in the United States and is an integral partner in developing Michigan's economic future. The system is demand-driven, locally-responsive, and ready to meet the needs of each community.

Michigan Works! collaborated with the Michigan Department of Health and Human Services (MDHHS) Training and Assistance for Needy Families (TANF) program to develop the PATH Program (Partnership. Accountability. Training. Hope.). When Michigan's program was re-organized, it was done with an eye toward helping more participants overcome challenges that might prohibit them from doing the preparatory work needed to successfully begin looking for a job. The program is about preparing clients to become job-ready--individually assessing them for job readiness and removing barriers that can prevent them from finding and keeping a job. Customers are helped along a proven path of activities while being provided access to resources identified to help participants overcome any barriers to work.

This additional assistance can include Medicaid, food assistance, State Emergency Relief including rent and utilities assistance, child care and transportation.

We believe that **WIOA offers us an unprecedented opportunity to rethink the way our workforce systems are structured as a whole.** These two states have found efficiencies in many areas of system performance as well as the ability to more effectively serve more people by using funds in an integrated fashion. **We would like to coordinate a panel discussion for you and your staff with representatives from other states** that have made significant changes to their workforce systems in order to accomplish very similar goals to what we are trying to do in Oregon.

#### BARRIERS/NEEDS

- **Clearly establish a governing body for the workforce system in Oregon** with statutory authority over all WIOA core partner programs as well as DHS employment and training programs.
- **Create policy that outlines support for functional supervision** of state staff and cross-agency hiring within the one-stop delivery system.
- **Develop the channels of communication** necessary to support the stakeholder transparency needed to shift perspective, to behave like a system
- A commitment to **staff development and cross-training** across programs and funding streams.
- **Eliminate barriers to joint procurement processes** for one-stop service providers across workforce system partners and agencies.
- **Remove institutional roadblocks to effective policy development.** Often in trying to develop effective local solutions, partners hit roadblocks within their own governing agency policies that prevent them from creating innovative, collaborative programs.

**We are dedicated to building an aligned workforce system in Oregon** by fostering strong partnerships. We can't do this work alone. We rely on strong state leaders to support our efforts, and invest in the existing system to ensure Oregon maintains a nationally recognized public workforce system. We, the nine members of **OWP, hold 135 years of collective experience as leaders in workforce development, and we stand ready to assist you in creating an Oregon where all can thrive.**



---

Tony Frazier, Chief Executive Officer  
Incite Incorporated (Mid-Valley LWB)



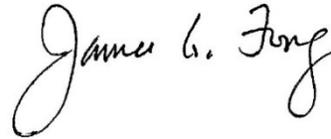
---

Andrew McGough, Executive Director  
Worksystems, Inc.



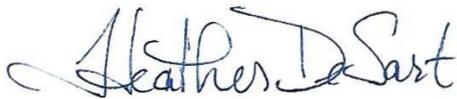
---

Kristina Payne, Executive Director  
Lane Workforce Partnership



---

Jim Fong, Executive Director  
Rogue Workforce Partnership



---

Heather DeSart, Executive Director  
Oregon Northwest Workforce Board



---

Jake McClelland, Executive Director  
Southwestern Oregon Workforce Board



---

Bridget Dazey, Executive Director  
Clackamas Workforce Partnership



---

Heather Ficht, Executive Director  
East Cascades Workforce Investment Board



---

William Rosholt, Executive Director  
Eastern Oregon Workforce Investment Board



January 6, 2017

The Honorable Kate Brown  
Governor of Oregon  
900 Court Street NE  
Salem, OR 97301

Dear Governor Brown:

This letter is to provide feedback in response to your wonderful question to us during your visit to the WorkSource Rogue Valley center in Medford on October 14, 2016: ***“How can we create the kind of partnerships we have in the Rogue Valley throughout the state?”***

Our region’s Local Leadership Team for the public workforce system has been diligently working on a comprehensive response to your question since your visit. We greatly valued and appreciated the time you spent visiting the center and meeting with the customers and staff to get a first-hand experience of the services, supports and success we’re able to generate through our partnerships.

We also received your letter of December 7, 2016 to Oregon’s Workforce Boards and other partners calling for the evaluation of workforce programs and feedback on what changes can be made to better focus our workforce dollars on lifting families out of poverty and strategically growing our economy. While the Oregon Workforce Partnership has crafted a collective response to your letter that focuses on statewide alignments and improvements, as one of the local regions already working on a response to your on-site question to us, we also wanted to send you our complementary ideas (*from our more region-centric perspective*) on how to create great workforce partnership throughout the state.

First, let us be clear that we by no means think we have a corner on the market on great partnerships, nor do we think we’re doing it better than anyone else at it. We know that many other regions have great partnerships, and are also light years ahead of us in many facets of the hard work of workforce system-building. We are just stalwart and humble practitioners, of equal stature to all our other colleagues in the state. But, we also recognize we’ve been fortunate to be the beneficiaries of circumstances and opportunities that have allowed us to forge a breadth and scope to our partnership that are highly regarded by many outside state level observers.

With mindfulness to the appropriateness of our standing, we therefore offer the attached report in response to your question to us. This document represents the collective work of our Local Leadership Team, comprised of the following individuals:

Mathew Balkwill	Branch Manager	DHS Vocational Rehabilitation
Tabitha Carlson	Project Director	WorkSource Rogue Valley (ResCare Workforce Services)
Jim Fong	Executive Director	Rogue Workforce Partnership

Jessica Gomez | Founder & CEO  
*Rogue Valley Microdevices -RWP Chair*

Gregg Edwards | Chief People Officer  
*ASANTE Health Systems- RWP Vice-Chair*

Matt Balkwill | Area Manager  
*Office of Vocational Rehabilitation*

Scott Beveridge | Superintendent  
*Southern Oregon Education Service District*

Wes Brain | Labor Representative  
*Retired SEIU*

Lance Corley | Inside Construction Director  
*Crater Lake Electrical - JATC*

Adam Cuppy | Co-founder & COO  
*Coding Zeal*

Mike Donnelly | Materials Manager  
*Carestream, Inc.*

Jon Flegel | Assistant Business Manager  
*IBEW 659*

Catherine Goslin | Director Human Resources  
*Rogue Valley Manor*

Shawn Hogan | VP Engineering  
*Linx Technologies*

Fred Holloway | Principal  
*Holloway Human Resources*

Nikki Jones | Owner  
*Express Employment Professionals*

Brent Kell | Executive Director  
*Valley Immediate Care*

Cathy Kemper-Pelle | President  
*Rogue Community College*

Norm Kester | CEO  
*Quantum Innovations*

Scott Koch | Vice President Territory Manager  
*Umpqua Bank*

Kirk Kolb | Superintendent  
*Grants Pass School District #7*

Doug Mares | District Manager  
*Oregon Department of Human Services*

Joe Myers | Vice President  
*Pacific Electrical Contractors*

Nagi Naganathan | President

Kim Oveson | Human Resource Officer  
*LaClinica*

Coleen Padilla | Executive Director  
*SOREDI*

Teresa Sayre | Superintendent  
*Phoenix/Talent School District*

Linda Schott | President  
*Southern Oregon University*

Chad Scott | Director Human Resources  
*Fire Mountain Gems & Beads*

Brian Shumate | Superintendent  
*Medford School District #549C*

Sherri Stratton | Senior Manager  
*Oregon Employment Department*

John Underwood | Human Resources Manager  
*Timber Products*

David Fricke	Senior Program Manager	Rogue Workforce Partnership
Julie Gillis	Senior Program Manager	Rogue Workforce Partnership
Rosemary Jernigan	Program Manager	Department of Human Services
Aurora King	Director of Business & Innovation	Rogue Workforce Partnership
Julie Rossi	Director, Adult Basic Skills & Individualized Career Training	Rogue Community College
Sherri Stratton	Area Manager	WorkSource Rogue Valley (Oregon Employment Department)

We would like to extend to you an open invitation to visit us again, anytime in the future. We would be happy to host another visit with customers or staff, and/or a site tour of one of our many great industry sector partners in Advanced Manufacturing, IT/E-Commerce or Healthcare.

This might also offer the opportunity to talk with you more about both the SOHOPE and REACH grants that you witnessed first-hand during your visit. In a final tribute to the late Senator Alan Bates, I would be remiss if I did inform you that the REACH grant was an initiative he spearheaded to pilot a reform/investment approach to improve DHS Self-Sufficiency outcomes. Unfortunately, with his passing, we are now left without a champion for this effort. Our partners would appreciate the chance to explore creative opportunities and options for sustaining this program and his work with you.

If you have any questions or would like to discuss the ideas and recommendations in the report further, we'd be eager to meet with you in-person or via videoconference. And, we stand ready, able and willing to work with you and all partners to build an aligned workforce system.

On behalf of our Local Leadership Team, the members of our Workforce Board and our many business and community partners, thank you again for your fabulous visit in October, and for recognizing the quality of our partnership work.

Sincerely,



Jim Fong  
Executive Director  
Rogue Workforce Partnership

## The Rogue Valley's Best Practices in Creating An Integrated Workforce System

### Report & Response to Governor Kate Brown's Question:

*"How can we create the kind of partnerships we have in the Rogue Valley throughout the state?"*

#### □ **Capitalize on Crisis and Opportunity**

- Our partnerships intensely deepened when budget cuts stripped away service capacity in 2012.
- We chose to build a new framework of collaborative leadership. We had to work together differently - more reliant on each other, building trust and new relationships.
- Changes in key leadership positions also helped bring in fresh energy and a willingness to do things differently, instead of the same old way.
- WIOA has also been a catalyst for deepening the workforce and education collaboration with Rogue Community College - Title II/Adult Basic Skills

#### □ **Strong & Committed Local Leadership Drives Cultural Change**

##### • **Shift Perspective**

###### ▸ ***We Think & Behave Like a System***

Our Local Leadership Team is deeply committed to a systems, rather than a programmatic approach. While each agency/organization must still manage the specific programs it's responsible for, through strong-willed leadership we've frequently been able to overcome program and organizational silos that would typically predominate. The result has been the emergence of systemic solutions and successes – such as those seen by customers in our SOHOPE and REACH grant programs. Our Local Workforce Board is the key convener, facilitator and driver of this systems approach. And, all participating agencies/organizations are led by forward-thinking and committed partners. However, we do need more alignment at the state policy and program administration levels (*see infographic on page 9*) to take our partnership to the highest level of fully functioning, high-performance system.

###### ▸ ***From a Supply-Side Driven System to a Demand-Driven System***

Our Local Workforce Board convenes the business-led Sector Strategies efforts. These real, tangible, in-demand jobs and related skill needs then drive our workforce system alignment. We work to align our career pathway building efforts and skill-building investments– especially for middle-skills jobs – to these higher-wage, in-demand jobs and career pathways that will lift people out of poverty.

###### ▸ ***Focus on Middle-Skills Jobs, K-20 Talent Pipeline & Career Pathway Links***

We are focused on middle-skills jobs, the trades/apprenticeships and other technically-based career paths. Middle-skills jobs are those that require more education and training than a high school diploma but less than a four-year college degree. For example, there are entry-level production jobs in manufacturing companies that could be obtained by a high school student, GED graduate, or an underemployed or dislocated adult worker who obtains an industry recognized certification. And, when this can be added to with more pre-apprenticeship, apprenticeship and/or other post-secondary training, could result in a career path progression that could lead in a few years to a \$60,000/year position, and even further career growth. Our Sector Strategies work to link industry leaders to workforce partners, post-secondary training providers, and K-12 school districts (*especially focused on*

CTE, STEM and Dual Credit) has all these partners working together to build this seamless talent development pipeline.

- **Build Trust & Transparency**

Teams don't start out great. They learn to become great over time. Patience and experience lead to understanding, trust and then high performance. We've built investments, over time, in each other's emotional / trust "accounts." We've come to know and appreciate each other's strengths, and have understanding and support for each other in our weaknesses. Most importantly, we've bonded together in common purpose, knowing that our intentions are aligned in creating a workforce system based on committed partnership.

- **Communication & Messaging – “We're all one team”**

Our Local Leadership Team strongly communicates this unified message all the time, to all staff and other partners. And, it's a strongly felt belief that emerged and grew as our team has formed, stormed, normed and performed. This constancy in message has grown over time as well, to where it now reverberates in all our common activities. At recently convened all staff trainings with 80 interagency staff, this unified message resonated throughout the proceedings. Staff came away with a better understanding of the each other's resources and a strong sense of common purpose to work together, as one team, and help our common customers.

- **Changing from a “No” culture to a “Yes” culture**

We continually strive to say “yes” to innovation that adds value and improves success for our common customers. This is a profound change in leadership and culture on the part of multiple agencies/ organizations, many with historically top-down, authority-based, bureaucratic cultures in which a “no” first (or only “our” way) culture has predominated. It's not yet perfect; these old patterns can still persist, but we have a critical mass of cross-agency leaders who are committed to finding innovative ways to continually generate better customer success.

- **Coming to the table with solutions rather than obstacles**

We strive to be on the same side of the table, working together to solve a shared problem through collective impact; rather than sitting across the table from each other in adversarial positions. This doesn't mean we don't sometimes strongly and respectfully disagree, or have moderately differing opinions on how best to move forward in partnership. But, we build our working relationships on a foundation of trust, respect, deep listening, dialogue, and seeking first to understand (*each other's thinking, beliefs, assumptions, and mental models, et.al.*), then to be understood. We are solution-focused, and are willing to come together to solve our programmatic, process and relationship issues as needed.

- **Leadership Across the Board**

Our Workforce Board continually communicates clear expectations to all partners and service providers with regards to integration, leveraging resources, and working outside our silos. Agency leaders at the state level are also communicating this same expectation message within their agencies. A recent statewide meeting of state agency managers was convened with the explicit purpose of getting key leaders all on the same page with regards to moving in partnership.

We also know that some regions in Oregon have historically struggled with creating partnerships and doing cross-agency integration work. We believe there are multiple factors that contribute to this

phenomenon, and that a multi-faceted, customizable and strengths-based approach will work best to help all regions rise to their highest potential in partnership.

Resiliency research tells us that success for individuals (and organizations) is fueled when there are high expectations set, high levels of support provided, and high levels of accountability created. We therefore recommend that the following steps be taken, in addition to the clear and continual expectations of integration and partnership currently being communicated by agency leaders and local Workforce Boards:

- ▶ **Update the Compass Policy & WSO Operational Standards** – These standards were developed and finalized prior to the new WIOA era of expanded partnership. They should be updated and expanded to include all the required partners. These newly updated standards can then set the minimum operational standards for the entirety of the public workforce system. The tight/loose framework that allows for regional flexibility, with defined minimum standards should be maintained to allow for maximum innovation and local systems improvement. Regions would thus be encouraged to experiment with promising practices, while maintaining core service standards.
- ▶ **Create a Partnership Toolkit** – This would be for regional partners, and would contain resources, links, tools, trainings, etc. to support systems integration and partnership. A potential starting point could be the best/promising practices identified in this document. In addition, this toolkit could also include the attached Power Point presentation – “*The Gestalt of Partnership.*” This presentation was recently crafted by partners from Rogue Community College and the Rogue Workforce Partnership for a presentation in October 2016 at the National Council for Career Education Annual Conference. It highlights key learnings, research-based approaches and hands-on tools to catalyze and support the partnership “team learning” process.
- ▶ **Create Peer-to-Peer Learning Opportunities** – For many adult learners, the best learning is done hands-on and person-to-person. An organized statewide peer-to-peer learning system is an excellent way to facilitate such hands-on learning. A regional self-assessment and interest-area tool could be created, topics of interest identified, and peer best/promising practice practitioners called upon to provide site-visit and/or videoconference-based “Peer-to-Peer Learning Sessions.”
- ▶ **Consultative Support / Technical Assistance** – Some partnership issues will require deeper support and intervention. State agency leader and Local Workforce Boards could work together to identify capacity to provide more intensive consultative support, structured facilitation and/or other forms of technical assistance. Particular attention should be paid to creating a comprehensive approach to conflict resolution for and between all levels of the partnership – both state and regional.
- ▶ **Create a Conflict Resolution Approach, Training & Process** – The vast majority of us are conflict avoidant; it’s natural human nature. Yet, unresolved conflict is the greatest source of friction in all human systems, including our public workforce system. System leaders should adopt a conflict resolution philosophy, cultural norm, training, routine approaches and processes to address simmering, boiling-over of just friction producing conflicts that are impeding the formation of real and fully functioning partnerships. Highly skilled conflict resolution trainers are also abundant in Oregon. They could be contracted with to provide foundational training on how to “thrive on conflict.”
- ▶ **Improve the Feedback/Accountability System for Partnership** – State agency and Local Workforce Boards could work together to improve the accountability structure related to our systems and service integration partnership. We strongly believe that all learning comes from reflection, and that each of us need to routinely hear about our success and weakness in order to become more effective in our work. To that end, an improved accountability system could include (but would not be limited to) the following:

- A 360° partnership assessment tool could be created to rate the level of partnership functionality.
- Building upon the current Operational Standards in place for the WorkSource Oregon One-Stop Centers might be a good foundational starting point for some of this next phase refinement in standards and accountability.
- What does it look like when a state or regional leaders are partnering well? What does it look like when they aren't? State and regional leaders can all participate as part of a comprehensive feedback process in which all stakeholders can assess the functional status of these partnerships. Such evaluations could be part of a One-Stop System/Center evaluation and certification process.
- What happens if a state and/or regional leader is performing sub-optimally in creating strong and effective partnership? What are the consequences, interventions and supports for behavior that delegitimizes partnership? How do we support and all hold each other accountable for being good team players? And, what happens when we're not? While there are well developed processes of performance evaluations and coaching within organizations, we do not yet have a cross-agency system in place to address partnership related issues such as these.

#### □ **Human-Centered Design**

Human-Centered Design is a term used by the famous design firm IDEO<sup>1</sup>. In 2014, the U.S. Department of Labor engaged IDEO to work with Oregon's workforce partners to introduce their design approach and innovation tools to program leaders, and to explore ways to re-design services in ways that profoundly meet the needs of customers. Our region was fortunate to have two participants in this design session, and we continue to digest and apply the lessons learned to create ever-increasingly value-added experiences for our customers. This may include, but is not limited to:

- Creating Value-Added Customer Experiences, Skills Gain, Credential Attainment, Job Placement Results & Career Path Entry.
- Asking our customers what they need and ask of us.
- Services and service plans focused on "end-state" rather than "process." With employer requirements foremost in mind – this involves identifying the skills, experiences and supports a person needs to be successful in their job/career goals; rather than being referred to processes just because that's the available program service that's been designed and designated as a next step.
- 12-month follow along services as a primary component to any service.
- We all have funding, goals and program specific guidelines, and we all put that aside (in a manner of speaking) and try to see: "how does the customer experience our resources?" We give our time, focus and resources to understand that make that experience better and leverage for the good of the customer. The human-centered design is a human-centered way of thinking versus personal and/or organization agendas.

---

<sup>1</sup> See: 1) <https://www.ideo.com/> 2) IDEO on 60 Minutes [https://www.youtube.com/watch?v=-3\\_lxJOhiUA](https://www.youtube.com/watch?v=-3_lxJOhiUA)  
3) IDEO in Businessweek <https://www.bloomberg.com/news/articles/2004-05-16/the-power-of-design>

## □ **Strategic Staffing, Hiring & Cross-Training**

### • **Cross-Agency Hiring**

This is a term used to describe hiring workers and managers with experience in multiple workforce agencies, organizations and programs. For example:

- We have multiple leaders in the region with over 20+ years of experience working in multiple programs and/or agencies (WIA/WIOA, DHS-JOBS, and OED). These leaders bring tremendous cross-systems knowledge and understanding. They are automatic systems and program integrators because of these unique cross-over skill sets. Cultivating and encouraging such cross-agency development has been a key element of our success.
- A recent cross-hiring brought a leader with extensive experience serving people with disabilities into the role of overseeing WIOA programs, broader systems integration and also co-leading our sub-committee for People with Disabilities with the Vocational Rehabilitation Branch Manager

### • **Outside Hiring**

Outside Hiring means hiring staff and particularly managers with no prior workforce or human service agency experience. In other word: fresh eyes. It's not a 100% thing. Just the notion of having diversity in our leadership talent pool. This is nicely mixed with some regional managers having 20-30 years of experience and knowing all the workforce programs across multiple agencies/programs. For example, one of our relatively new managers came from a private sector human resources background. And, another new manager came from alumni relations experience at an out-of-state university, plus had been a program manager at a Woman's Center. Both are new to the public sector workforce system world.

### • **Commitment to Staff Cross-Training**

We recently convened our first inter-agency cross training with over 80 participants from a half-dozen partner agencies/organizations. Basic foundational information was shared from each organization about its programs and service populations. The session was incredibly positive. Great evaluations. Staff said they learned so much about partner agencies and how to better serve and refer their customers. We plan to hold these cross-training sessions regularly throughout the year.

### • **Sustaining Our Collaborative Leadership Culture**

Local leaders are strongly committed to keep collaboration alive when key people leave. This new normal will be enculturated into the fabric of our way of doing business. We will build upon our past practice of participating on each other's hiring panels/selection committees when future key leadership positions open up, and also bring new leaders on in a supportive manner that clearly sets the expectation high on real partnership behaviors, norms and practices.

## □ **Administrative Alignment**

Due to fortuitous circumstances, our region enjoys a rich history of partnership, common program management and co-location. Starting in the late 1980's DHS began a pilot contracted partnership with The Job Council – then the JTPA service provider (precursor to WIOA/WIA). In 1990, DHS created a statewide structure in which its JOBS program contractors could be either the JTPA service provider or a local Community College. In the Rogue Valley, an inter-governmental compact was formed that consisted of The Job Council, Rogue Community College and the Oregon Employment Department. Southern Oregon Goodwill Industries was then added as an additional contracted service provider to serve clients requiring more in-depth wrap-around supports. Over the years, RCC and OED no longer participated as a JOBS

contracted service providers. However, in recent years, RCC has contracted to provide support for the NCRC lab in Josephine County.

However, in spite of this level of partnership, a truly integrated service delivery model did not evolve between JOBS and WIA until the 2012 budget crisis. This “opportunity moment” created the circumstances for co-located, but still siloed programs to finally start to get integrated. Since, this time, program managers from partner agencies worked diligently to apply all the tools and techniques described above to create a more integrated service model between JOBS, WIA / WIOA and OED programs.

Over these years, many administrative structures and even some organizations have come and gone. What we’ve found is that structure does matter. It’s not a sole determinant, but it can appreciably improve the chances for a systemic, rather than a programmatic approach, if the system is managed effectively. To put it into a simple formula:

**Right Administrative Structure + Right Leadership & Management = Better Integrated Services & Improved Customer Success**

Much of what’s been described above constitutes how to go about cultivating the “Right Leadership & Management.” Here now are some suggested ideas to improve the state and regional administrative structure to enhance partnerships:

- **State Level Alignment**

The January 5, 2017 letter from the Oregon Workforce Partnership to Governor Brown in response her call for evaluation of workforce programs and to provide feedback on increased system effectiveness, recommends boldly rethinking the way our workforce systems are structured as a whole. And, looking to examples of other best practice states such as Texas and Michigan, as ways we might more effectively restructure program silos into a more seamlessly integrated administrative and program management structure.

The infographic on page 10 depicts the levels, multiple agencies and program silos that make up the workforce system and our closely related K-20 education system partners. This complex array of partners and programs requires further streamlining at the state Program Administration level.

- **Joint Procurement Process**

Currently, procurement for contracted service providers are all done within the separate silos of each partner organization. Each of these organizations – DHS, VRD, HECC, and OED – manages procurement in their separate programmatic silo. With the passage of WIOA, we are for the first time, in a few cases, starting to talk about coordinating our procurement processes (for example for Title II – Adult Basic Skills providers). But, there is a still strong organizational prerogative to manage within the silo. The depth and level of coordination, integration and partnership is dependent upon the sitting program manager and/or agency administrator. And, their willingness to manage in a fully “integrated” manner has yet to be determined. If past performance is a predictor of future performance, we anticipate this level of systemic versus programmatic thinking to vary, depending on the partner agency.

While Oregon considers the opportunities that the Texas and Michigan models offer, we would recommend that in the interim, all appropriate procurement efforts by partner agencies be done jointly, between the authorized state agencies and Local Workforce Development Boards.

Our region did such a joint procurement in 2014. The Rogue Workforce Partnership (RWP) and DHS issued a joint RFP for DHS-JOBS, OFSET and WIOA Adult, Dislocated Workers and Out-of-School Youth services. A single service provider was chosen to provide these services in an integrated manner.

- **Simplifying and Streamlining Contracting**

After DHS and RWP shared a joint procurement process for our region, instead of issuing a single contract, a negotiated decision was made for each entity to enter into separate contracts with the service provider. DHS and RWP continue to have two differing points of view on this topic. They are as follows:

- **DHS Position - Maintain Separate DHS & WIOA Service Provider Contracts** - A single contract? This is where DHS would like us to be careful. DHS believes in the alignment of the work. However, it's important the expertise from each agency is valued and that we allow individuals to seek out services that are in demand so not to water down the services to meet the middle. We need to allow for inclusive work where one can align metrics and create other services where necessary. To do this, we will need each agency to hold their own contract dollars but allow for innovative movement forward.
- **RWP Position – Create a Single DHS & WIOA Service Provider Contract** - From the RWP perspective the two-contract arrangement creates excessive complexity and additional administrative burden. A single contract through the RWP would be in greater alignment with the streamlined administrative best practices of Texas and Michigan.

We believe it is 100% possible to create administrative streamlining, while simultaneously meeting all the needs of DHS:

- valuing the “expertise from each agency,” by ensuring theirs is the primary lead voice at the program design and management table
- allowing “individuals to seek out services that are in demand so not to water down the services to meet the middle,” and
- allowing “for inclusive work where one can align metrics and create other services where necessary”

Administrative management can be compartmentalized and made separate and distinct from the critical program management decision-making. RWP is committed to having DHS maintain this leadership role. Separate contracts and the current administrative structures promote historically programmatic (rather than systemic) inclinations. Such a structure promotes a siloed approach, and detracts from the ability of the Workforce Board to effectively oversee the delivery of workforce services in an integrated, systemic way, which it is charged to do under WIOA.

For example, because of the separate contract approach, the JOBS contract performance measures did not include metrics on the level of co-enrollment of TANF customers in WSO and WIOA IB Training investments. This is a key cross-program indicator to maximize the power of partners to work together in lifting individuals out of poverty. In spite of this contract gap, and even while lacking the contract oversight authority to do so, RWP staff continued to advocate and coach the new service provider for such cross-enrollments, which resulted in more positive outcomes for TANF customers. But, the dual contract separation made this effort overly complex, inefficient and without the requisite contract oversight authority.

The challenge facing Oregon is in creating a seamless statewide workforce system that efficiently processes administrative functions such as procurement and contract management, while meeting the essential program management priorities and preferences of individual partner agencies.

Streamlining the contracting process to generate integrated services and leverage better customer outcomes that lift more Oregonians out of poverty should be a desired goal all partners can agree to. Arriving at such a system, will require on-going dialogue, and perhaps eventually a return to impasse, in which partners agree to disagree, and no effective way to quantitatively measure the benefits of one approach over the other are ever agreed upon.

## □ **Measure, Evaluate, and Act**

### • **Learning What Works**

We believe that all learning comes from reflection. We strive to continually learn what's working and what's not. This involves:

- Constant feedback loop | Self-reflection | Continuous learning & improvement
- Tracking and Reviewing Actionable Data *(we're just now expanding our scope and capacity in this)*

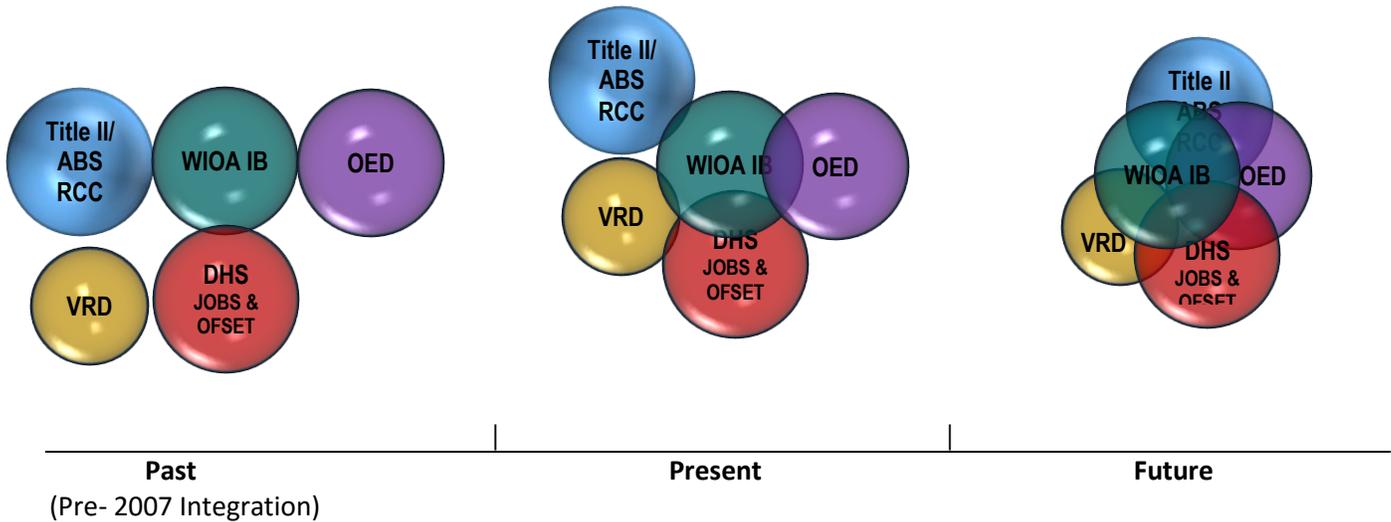
Through data analysis and program evaluation, we seek to continually reassess our program assumptions and hypothesis, and make the improvements necessary to continuously improve customer outcomes. In the near future, we want to start comparing our region's efforts with those of other regions. For example:

- We'd like to work with DHS and WSO partners to run comparative customer service level and outcome data for the DHS-JOBS customers we serve in our WSO centers. We are one of the few sites in the state in which this program is integrated, and we'd like to have state agency partners help us do a comparative analysis to other similar-sized centers which are not yet integrated.
- In some regions, some agency leaders/staff may wish to stay rigidly within historically defined bodies of work, as opposed to engaging in an "all hands on deck," let's all do whatever we can to work together and help our customer succeed. By comparing performance data between different sites with differing operational modalities, we can assess if one modality generates better results.
- After-action reports
  - What was supposed to happen
  - What happened
  - What to: do more of / stop doing / change or do differently
  - Why does it break down? Why doesn't it happen?
- We will need to separate out partner data "need" vs. "want." Agency program managers tend to pile in on idealized "wants" for data, rather than sticking to the essential data "needs."
- We need a shared data system. We believe that there are more pronounced steps we can collectively take to routinize integration, data warehousing and analysis efforts between our public workforce programs at the state level, to help us manage more effectively on the ground. By doing so, we can create integrated and longitudinal data sets that will help us more effectively help our common customers achieve success.

❑ **Critical Role of Workforce Board as System Convener, Consolidator & Facilitator**

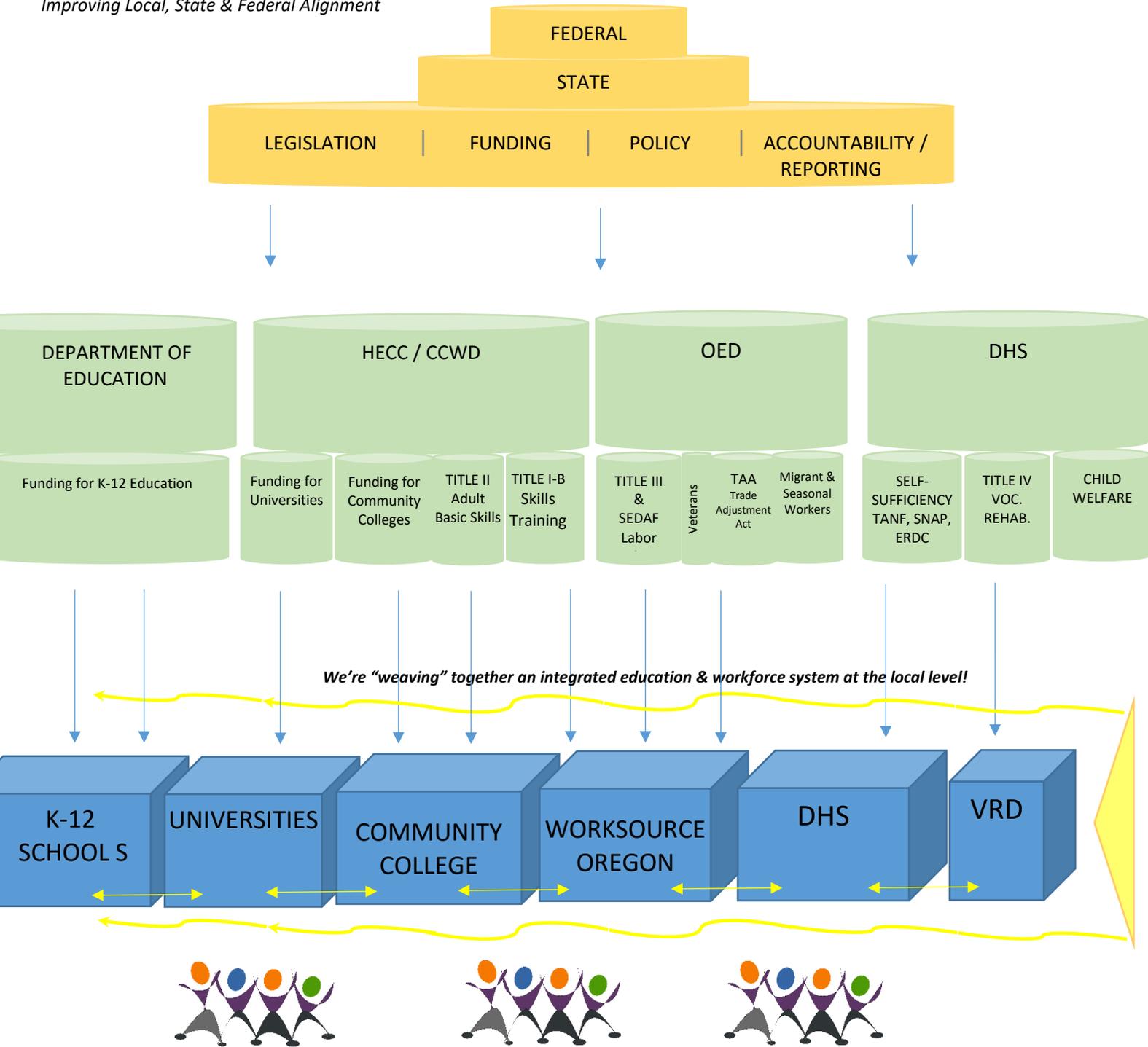
Our Workforce Board - the Rogue Workforce Partnership - serves a critical, federally-mandated role to provide systems integration facilitation, oversight and management to regional partners. In this case, the tragedy of the commons is that there are currently insufficient resources dedicated to sustaining this critical system-building capacity. And, while WIOA calls upon mandatory and designated partner agencies to contribute to the common infrastructure of the system, this is left to individual “negotiations” with regional and/or state level managers, with a minimalist level of state level backstop. As we come upon the first year federal requirement to enter into Memorandum of Understandings, Resource Sharing Agreements and One-Stop Operator designations/ procurements – shared co-investments in this core system-building capacity that serves the commons will be critical to maintain the momentum we’ve achieved. There is a need to improve the funding alignment and fiscal structure to support this system-building role.

❑ **Visualizing the Progression of Our Partnership Evolution**



v.20170106

**Partnership Best Practices**  
*Improving Local, State & Federal Alignment*



**POLICY-MAKING**

Policy-Makers need to hear directly from front line program managers, staff & customers to inform policy changes

**PROGRAM ADMINISTRATION**

More service integration alignment work is needed at the state-level with agencies – guided by Local Workforce Boards/ the field, & with OWIB oversight

**PROGRAM MANAGEMENT**

**Our Partnership Work:**

- Capitalize on Crisis and Opportunity
- Local Leadership & Cultural Change – “think & behave like a system”
- Human-Centered Design
- Strategic Staffing, Hiring & Cross-Training
- Administrative Alignment
- Measure, Evaluate, and Act on What’s Working & What’s Not

**FRONT LINE WORK**

**CUSTOMERS / OREGONIANS**

# Trump team prepares dramatic cuts

By Alexander Bolton - 01/19/17 06:00 AM EST



Donald Trump is ready to take an ax to government spending.

Staffers for the Trump transition team have been meeting with career staff at the White House ahead of Friday's presidential inauguration to outline their plans for shrinking the federal bureaucracy, The Hill has learned.

The changes they propose are dramatic.

The departments of Commerce and Energy would see major reductions in funding, with programs under their jurisdiction either being eliminated or transferred to other agencies. The departments of Transportation, Justice and State would see significant cuts and program eliminations.

The Corporation for Public Broadcasting would be privatized, while the National Endowment for the Arts and National Endowment for the Humanities would be eliminated entirely.

Overall, the blueprint being used by Trump's team would reduce federal spending by \$10.5 trillion over 10 years.

The proposed cuts hew closely to a blueprint published last year by the conservative Heritage Foundation, a think tank that has helped staff the Trump transition.

Similar proposals have in the past won support from Republicans in the House and Senate, who believe they have an opportunity to truly tackle spending after years of warnings about the rising debt.

Many of the specific cuts were included in the 2017 budget adopted by the conservative Republican Study Committee (RSC), a caucus that represents a majority of House Republicans. The RSC budget plan would reduce federal spending by \$8.6 trillion over the next decade.

Two members of Trump's transition team are discussing

the cuts at the White House budget office: Russ Vought, a former aide to Vice President-elect Mike Pence and the former executive director of the RSC, and John Gray, who previously worked for Pence, Sen. Rand Paul (R-Ky.) and Speaker Paul Ryan (R-Wis.) when Ryan headed the House Budget Committee.

Vought and Gray, who both worked for the Heritage Foundation, are laying the groundwork for the so-called skinny budget — a 175- to 200-page document that will spell out the main priorities of the incoming Trump administration, along with summary tables. That document is expected to come out within 45 days of Trump taking office.

The administration's full budget, including appropriations language, supplementary materials and long-term analysis, is expected to be released toward the end of Trump's first 100 days in office, or by mid- to late April.

Rep. Mick Mulvaney (R-S.C.), Trump's choice to head the Office of Management and Budget, has not yet weighed in on the proposed spending reforms because he is still awaiting confirmation by the Senate.

Mulvaney voted for the RSC budget offered as a more conservative alternative to the main House Republican budget in 2015. The House did not vote on the RSC budget for fiscal year 2017.

The preliminary proposals from the White House budget office will be shared with federal departments and agencies soon after Trump takes the oath of office Friday, and could provoke an angry backlash.

Trump's Cabinet picks have yet to be apprised of the reforms, which would reduce resources within their agencies.

The budget offices of the various departments will have the chance to review the proposals, offer feedback and

appeal for changes before the president's budget goes to Congress.

It's not clear whether Trump's first budget will include reforms to Social Security or Medicare, two major drivers of the federal deficit.

Trump vowed during the campaign not to cut Medicare and Social Security, a pledge that Rep. Tom Price (R-Ga.), his pick to head the Department of Health and Human Services, told lawmakers in testimony Wednesday has not changed.

Yet it could be very difficult to reduce U.S. debt without tackling the entitlement programs. Conservative House budgets have repeatedly included reforms to Medicare and Social Security, arguing they are necessary to save the programs.

The presidential budget is important in setting policy and laying out the administration's agenda, though Congress would be responsible for approving a federal budget and appropriating funds.

Moving Trump's budget through Congress could be difficult. In 2015, with the GOP in control of the House, the RSC budget failed by a vote of 132 to 294.

Moderate Republicans and Democrats on the Appropriations Committee are likely to push back at some of the cuts being considered by Trump.

But they seem likely to have the support of Mulvaney, a conservative budget hawk who backed the RSC budget.

"Mick Mulvaney and his colleagues at the Republican Study Committee when they crafted budgets over the years, they were serious," said a former congressional aide. "Mulvaney didn't take this OMB position to just mind the store."

"He wants to make significant, fundamental changes to the structure of the president's budget, and I expect him to do that with Vought and Gray putting the meat on the

bones," the source added.

The Heritage blueprint used as a basis for Trump's proposed cuts calls for eliminating several programs that conservatives label corporate welfare programs: the Minority Business Development Agency, the Economic Development Administration, the International Trade Administration and the Manufacturing Extension Partnership. The total savings from cutting these four programs would amount to nearly \$900 million in 2017.

At the Department of Justice, the blueprint calls for eliminating the Office of Community Oriented Policing Services, Violence Against Women Grants and the Legal Services Corporation and for reducing funding for its Civil Rights and its Environment and Natural Resources divisions.

At the Department of Energy, it would roll back funding for nuclear physics and advanced scientific computing research to 2008 levels, eliminate the Office of Electricity, eliminate the Office of Energy Efficiency and Renewable Energy and scrap the Office of Fossil Energy, which focuses on technologies to reduce carbon dioxide emissions.

Under the State Department's jurisdiction, funding for the Overseas Private Investment Corporation, the Paris Climate Change Agreement and the United Nations' Intergovernmental Panel on Climate Change are candidates for elimination.

Conservatives allied with fiscal hawks such as Pence, Paul and the Heritage Foundation say the time is long past due to get serious about cutting the federal deficit.

"The Trump Administration needs to reform and cut spending dramatically, and targeting waste like the National Endowment for the Arts and National Endowment for the Humanities would be a good first step in showing that the Trump Administration is serious about radically reforming the federal budget," said Brian Darling, a former aide to Paul and a former staffer at the Heritage Foundation.

# Eliminate Workforce Innovation and Opportunity Act Job-Training Programs

## RECOMMENDATION

Eliminate the Workforce Innovation and Opportunity Act (WIOA). This proposal saves \$3.435 billion in FY 2017.

## RATIONALE

The Department of Labor has a history of operating ineffective job-training programs. The evidence from every multi-site experimental evaluation of federal job-training programs published since 1990 strongly indicates that these programs are ineffective. Based on these scientifically rigorous evaluations using the “gold standard” of random assignment, these studies consistently find failure. Federal job-training programs targeting youth and young adults have been found to be extraordinarily ineffective.

According to a 2009 GAO report:

[L]ittle is known about what the workforce system is achieving. Labor has not made such research a priority and, consequently, is not

well positioned to help workers or policymakers understand which employment and training approaches work best. Knowing what works and for whom is key to making the system work effectively and efficiently. Moreover, in failing to adequately evaluate its discretionary grant programs, Labor missed an opportunity to understand how the current structure of the workforce system could be modified to enhance services for growing sectors, to encourage strategic partnerships, and to encourage regional strategies.<sup>60</sup>

There is abundant evidence suggesting that federal job-training programs do not work.

---

## ADDITIONAL READING

- David B. Muhlhausen, “Do Federal Social Programs Work?” Heritage Foundation *Backgrounder* No. 2884, March 19, 2014.
- U.S. Government Accountability Office, “Workforce Investment Act: Labor Has Made Progress in Addressing Areas of Concern, But More Focus Needed on Understanding What Works and What Doesn’t,” February 26, 2009.

## CALCULATIONS

Savings are expressed as budget authority as requested for FY 2017 on page 243 of Office of Management and Budget, “The President’s Budget for Fiscal Year 2016,” 29-1. “Federal Budget by Agency and Account Explanatory Note,” 2015.

To: Rogue Workforce Partnership Business Leaders  
From: Jessica Gomez  
RE: Federal Budget Scenarios & Call to Action  
Date: \_\_\_\_\_

Dear Rogue Workforce Partnership Business Leaders:

Here's a link to a recent news article on the Trump Administration's federal budget efforts:  
<http://thehill.com/policy/finance/314991-trump-team-prepares-dramatic-cuts>.

Also attached is an excerpt from the Heritage Foundation's 2017 proposed budget referred to in this article: The Heritage proposal to "**Eliminate Workforce Innovation and Opportunity Act Job-Training Programs**" is consistent with previous attempts over many years by some members of Congress to significantly cut federal spending, including eliminating WIA (now WIOA) program funding. These funds are critical to our work in building a talent pipeline to meet our region's business workforce needs.

Here's what's wrong with this proposal to eliminate WIOA job training investments?

- **There's a Manufacturing Skills Gap**  
President Trump has promised to make America First, and is implementing economic policies that he believes will bring back manufacturing jobs. But, manufacturing industry leaders in our region, state and nation have long reported a growing shortage of skilled workers.<sup>1</sup> And, this skills gap in the workforce is projected to last well into the future, due to the accelerating retirement of skilled baby boom workers.
- **We Need to Make More Investments in Job Training; Not Eliminate Them**  
Eliminating WIOA job-training programs is the wrong thing to do. In fact, we need to double-down on training and skill-building investments in our workforce. Industry leaders say this is what's needed, through stronger partnerships with our public workforce and education system.
- **We Need to Focus on the Skilled Trades and Training for "Middle-Skills" Jobs**  
We need to focus on training both our youth and current adult workforce for the many blue-collar jobs such as those in the skilled trades (electricians, millwrights, plumber/steamfitters, carpenters, etc.) and the many other technical "middle-skills" jobs in manufacturing and other industries which require more training than a high school diploma, but less education than a 4-year college degree. These high-demand jobs better opportunities to career pathways and success.
- **Investing in the "Talent Pipeline" is Investing in Infrastructure**  
As we reinvest in our physical infrastructure, we need to also reinvest in our "talent pipeline," to create the workforce who will rebuild our highways and bridges, and work in our factories. This is the priority focus of our business-led local Workforce Development Board(s), and it needs to be the same priority for our federal government.
- **Industry-Led Workforce Boards Make Sure That Workforce Programs Work**  
The Heritage Foundation's recommendation to eliminate WIOA job training programs is flawed and misinterprets the GAO report findings. Industry leaders on our Workforce Boards are making sure that workforce programs work. We're skilling-up workers to fill the workforce gap, especially in the key industries of manufacturing, technology and healthcare.

---

<sup>1</sup> Anna Louie Sussmam, "[As Skill Requirements Increase, More Manufacturing Jobs Go Unfilled](#)," Wall Street Journal – September 1, 2016  
JulieGrace Brufke, "[House Lawmakers Say America Needs More Skilled Workers to Fill Manufacturing Jobs](#)," The Daily Caller, May 12, 2016  
Drew Greenblatt, "[Addressing the Upcoming Manufacturing Talent & Skills Shortage](#)," Inc., August 25, 2015  
Dr. Thomas A. Hemphill, et.al, "[Strategies for Manufacturing's Skilled Worker Gap](#)," U.S. Chamber of Commerce Foundation

The Hill article provides some hope in that the Heritage Foundation / Republican Study Committee's (RSC) previous budget plans were not passed in 2015. The article state that: *"with the GOP in control of the House, the RSC budget failed by a vote of 132 to 294."* And, that *"moderate Republicans and Democrats on the Appropriations Committee are likely to push back at some of the cuts being considered by Trump."*

**The message we've been giving consistently to Representative Walden and other member for the Oregon delegation for number of years now is that strong investments in workforce development should be viewed as investment in creating strong business growth and a strong economy.** In the last Sequestration funding bill, one of the very few line items the House added back to the draconian budget cuts after the initial announced cuts was to the Department of Commerce's Small Business Development division/programs. That being said, The Hill article, says that *"The Heritage blueprint used as a basis for Trump's proposed cuts calls for eliminating several programs that conservatives label corporate welfare programs: the Minority Business Development Agency, the Economic Development Administration, the International Trade Administration and the Manufacturing Extension Partnership."*

We are engaging Workforce Board business leaders from Oregon's 2<sup>nd</sup> Congressional District to communicate with Rep. Walden ASAP, and get a clear message to him to prevent elimination or cuts to workforce programs by:

- Signing-on to a letter of support for sustained funding for WIOA job training investments (*insert link\_\_\_\_\_*)
- Participating in videoconference or in-person meetings with Rep. Walden to advocate for WIOA job training investments

We ask that you join us in this important effort to sustain the work underway to grow a strong workforce, grow strong businesses and create strong economies in all of our communities throughout Oregon. Please don't hesitate to contact me if you have any questions or want to communicate more about this important initiative.

Sincerely,

Jessica Gomez  
Founder & CEO

