



Rogue Workforce Partnership - Corporate Directors Meeting

Wednesday, March 22, 2017 • 3:00-4:00 p.m. | 100 E. Main Street, Suite A - Board Room • Medford

Video/Phone Conference access available <https://global.gotomeeting.com/join/717163069>. Select your audio preference:

1) Use telephone +1 (646) 749-3131; Access Code: 717-163-069 (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. **Election of Officers** (2m) - **Action Item** Jessica & Jim Fong
 - Chair & Vice-Chair
3. **Corporate Directors - New Members Appointment** (2m) - **Action Item** Jessica
 - John Underwood – Timber Products
 - Shawn Hogan – Linx Technology
4. **Consent Agenda** (1-5m) - **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. **Minutes Approval**
 - January 31, 2017 - RWP Corporate Directors Meeting
 - b. **Program, Administrative / Fiscal Policies Approval**
 - Dislocated Worker Eligibility
 - Priority of Services
 - Personal Identifiable Information
 - Entrepreneurial Training
 - Travel & Expense Reimbursement
5. **RWP Workforce Board Member Update** (2 m) Jim
6. **RWP Staffing Update** (5-10 m) Jim
7. **Federal Funding Update** (15-20 m) Jim

Here are recent news links on the proposed budget the White House just Submitted to Congress. We'll discuss this in more detail at our meeting


- <https://www.washingtonpost.com/>
- https://www.washingtonpost.com/business/economy/labor-dept-cuts-target-job-training-programs-for-seniors-disadvantaged-youths/2017/03/15/4aba0966-0999-11e7-93dc-00f9bdd74ed1_story.html?utm_term=.9797b03eb5e4
- <http://www.businessinsider.com/trumps-skinny-budget-might-be-dead-on-arrival-2017-3>
- https://www.nytimes.com/2017/03/15/us/politics/budget-epa-state-department-cuts.html?_r=0
- <http://www.washingtonexaminer.com/heres-the-skinny-on-trumps-skinny-budget/article/feed/2176580>

8. Other Items

Jessica

9. Adjourn

Jessica

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

Auxiliary aids and services are available upon request to individuals with disabilities. Please contact Tami Allison at 776-5100.

The RWP is a private/public partnership which addresses the employment needs of Jackson and Josephine Counties

100 E. Main St., Suite A. | Medford, OR 97501-6125 | (541) 776-5100



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

January 31, 2017 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Commissioner Rick Dyer (via phone)
Michael Donnelly (via phone)
Nikki Jones
Jessica Gomez
Gregg Edwards

MEMBERS ABSENT

Commissioner Dan DeYoung

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Director of Administration, Rogue Workforce Partnership (via video conference)
Julie Gillis, Rogue Workforce Partnership
David Fricke, Rogue Workforce Partnership
Tami Allison, Rogue Workforce Partnership

Quorum Present: Yes

1) Call to Order

The meeting was called to order by Chair Jessica Gomez at 3:05 p.m. Introductions were made.

2) Consent Agenda

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

3) RWP Governance/Administration

Membership Update-

Jim indicated that based on a further review of this document, he spoke with Kurt Tackman at CCWD, to clarify the interpretation requirements of the Labor, JATC, CBO, and organizations. Based on the discussion, it was confirmed that “organizations” can be school districts. Jim moved those school district members under the Organizations category which decreased the membership to 27. Jim added that Teresa Sayre was not included in this list as she is retiring.

Jim indicated that although Wes Brain has indicated that he would like to continue on the Board, Barbara Byrd, at the state AFL-CIO shared that it may be more appropriate to have an active labor representative be on the RWP. Jim will be connecting with Barbara to follow-up on next steps.

Commissioner Dyer indicated that Drew Waits of the Plumbers and Steamfitters Union Local 290 is running a pre-apprenticeship program. Commissioner Dyer and Jim met with Drew, along with Medford School District Superintendent Brian Shumate – to discuss sending students and adult career seekers to this programs in White City. Drew has also indicated interest in joining the RWP.

It was noted that all names, labeled in red, can be changed as they have all been officially appointed to the Board. Changes to labor and Department of Human Services will also be made.

2017 Meeting Schedule & Attendance Policy

The group moved on to review the responses to the Doodle Poll regarding 2017 Board Meetings. Thirteen out of 27 responses were received. Jim indicated that the choice point for this group is no regular dates work for everyone, do we want to expand the Doodle Poll? Jessica suggested that staff look at the most attended day each quarter, then contact those who did not respond to arrive at the maximum attendance possibly and confirm those dates.

Discussion moved on to Board member attendance. The group feels that a minimum attendance policy should be instituted. More details will be forthcoming.

Rogue Workforce Board Roles & Responsibilities

Two documents (WIOA Law, Oregon Workforce Partnership) were reviewed containing information on Roles & Responsibilities of the Workforce Board. Jim clarified that part of the responsibility of RWP is overseeing the system, while the other part is overseeing the WorkSource Rogue Valley One-Stop Center. Jessica added that the board is already doing much of this work based on the previous 2014 Governor's Executive Order.

Jim reported that RWP staff and mandatory partners are working on the RSA, MOU, and One Stop Operator that is due to be in place on June 30, 2017.

It was clarified that Commissioner Rick Dyer will remain as our Jackson County Liaison, and that Commissioner Dan DeYoung from Josephine County is replacing Cherryl Walker as the Josephine County Liaison. In addition to serving on the RWP Corporate Directors, both County Commissioners will also be the two members on the Rogue Valley Workforce Consortium – which functions as the “Chief Elected Official” as defined in the Workforce Innovation & Opportunity Act.

“The Corporate Directors behaves as the Executive Committee of the Workforce Board” stated vice-chair Gregg Edwards, adding that there are some federally mandated things that

must be brought before the full workforce board. Corporate Board outputs/deliverables would be to push/bring items to the workforce board. Many of the discussion and decision-making would be at the full Workforce Board level. The group briefly discussed integration vs. collaboration and the importance of looking at the impact of the dollars used in each. Collaboration takes a lot of time and money; where integration should be saving time and money.

Jim stated that this is not a traditional non-profit board - which involves direct service provision and often requires fund-raising and other duties - but is one where we are managing a system and delivering on an integrated system. The Rogue Valley Workforce Consortium appoints the Workforce Board and serves on the RWP Corporate Directors. And, the Corporate Directors appoints its own members from amongst the business members on the full Workforce Board.

Orientation for new members also needs to be updated and renewed. It's been a while since we've conducted orientations, and some new members are requesting it. Jim has asked our new RWP staff members, Julie Gillis and Dave Fricke, to take on this task. Jessica and other Directors suggested we assign "buddies" to new members – to sit next to them in RWP meetings and provide other mentoring. It was also agreed to have as many Corporate Directors and/or buddies join with new members in the orientation as possible.

RWP staff will take all of the above feedback on meeting schedule, begin planning orientations, and team new members up with current member buddies.

Getting More Organized with Our Meetings

Julie Gillis and David Fricke, RWP staff presented a PowerPoint on the RWP Board Structure, and indicated the importance of the Corporate Directors having a quorum and that they continue to meet during the months that the full board does not meet. The Corporate Directors act as the leadership group for the larger workforce board.

Information was presented and discussion took place regarding:

- Board Member Orientation
- Having orientation materials on the website with links available to other documents, as well as hard copy materials for those who may prefer them
- Do a peer mentoring with new board members and current board members
- Having a visual of the roles of each entity and how they fit together
- Have key agenda items mapped out for the year (i.e. budget, performance, local plan)
- State of the Workforce Report (Jim will check to see if this is still a state requirement)

4) Dashboard Next Steps

Jim shared that we're making good progress in having a good dashboard, and "under the hood performance metrics.

Dave reviewed the dashboard draft along with a the whiteboard depiction that Shawn Hogan brainstormed at a previous meeting with Jim, Dave, and Julie. This incorporated examples of Key Performance Indicators (KPI) used by Lynx Technologies. The most important thing to track over time is moving up a career path and ongoing career training. Capable people (social/emotional development, critical thinking skills, problem solvers, innovators, etc.) are what's needed to emerge from the workforce system.

Discussion took place:

- How to mine the potential of the current labor market?
- What can we do to modify programs to be the most effective to the specific population?
- How do we make our decreasing funding the most effective?

Members feel although we gather eligibility information, it is not designed around data driven performance metrics.

5) Public Workforce System

With the exception of a small portion of this topic being discussed under the RWP Governance/Administration agenda item, this topic was not discussed further due to time constraints.

6) State & Federal Coordination - Outreach & Systems Alignment

Jim led the group through the handouts in today's packet and shared that there's a \$1.8B dollar budget deficit at the state level. Efforts need to be made to engage key state legislators, especially the Joint Ways and Means Education Subcommittee and ensure they're informed as to the critical need state resources need. Some suggestions presented:

- Look at where we would prefer cuts to be made and let them know where the money needs to be in the best interest of the system. In the current economy, OJT's are less of a priority than the Board Support fund allocation to ensure we have the capacity to do the RWP core work. We need to advocate for flexibility in these state funds.
- Have a more in-depth conversation about where the core pieces are (Sector Strategies and Board Support are critical to coordination)
- Develop an ROI for our advocating and the ROI for the taxpayer
- Layout different funding scenarios on different levels of funding cuts

Jim will take the above information, to the Oregon Workforce Partnership meeting in Salem in a couple of weeks to refine next steps.

Jim reviewed a draft letter from Jessica to the Rogue Workforce Partnership business leaders providing an article on proposed Federal budget reductions, as well as an excerpt from the Heritage Foundation's 2017 proposed budget and proposal to **Eliminate Workforce**

Innovation and Opportunity Act Job-Training Programs, as well as bulleted points on what's wrong with the proposal to eliminate WIOA job training investments.

Other Workforce Board business leaders from Oregon's 2nd Congressional District have been engaged with us to communicate with Representative Walden as quickly as possible and get a clear message to him to prevent elimination or cuts to workforce programs. Per Jessica's suggestion, Jim has been in contact with Representative Walden's office about scheduling a videoconference call ASAP. The goal is to get a reality check with him on what's really viable and possible to accomplish in our legislative information sharing and advocacy.

- Jim will forward the email he sent to Jessica who will follow up with Representative Walden's office as well.
- Jim will forward the email, as well, to Commissioner Dyer, Troy Ferguson, all the Corporate Directors as well as both local and DC offices to get time on Representative Walden's schedule.
- A call will also be coordinated with Ron Painter, President of the National Association of Workforce Boards (NAWB)

7) Philanthropic Grant Applications

Due to time constraints, this topic was not discussed.

8) Other Items

There were no other items brought before the Rogue Workforce Partnership Corporate Directors.

9) Adjourn

With no further business, the RWP Corporate Directors meeting was informally adjourned at 5:15 pm.

Respectfully Submitted,

Tami Allison
Executive Projects Manager

Approved

Date

Jessica Gomez, RWP Chair



MEETING HIGHLIGHTS

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

March 1, 2017 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Michael Donnelly (via phone)

Nikki Jones (via phone)

Jessica Gomez

MEMBERS ABSENT

Commissioner Dan DeYoung

Commissioner Rick Dyer

Gregg Edwards

OTHERS PRESENT

Shawn Hogan, Linx Technology

Jim Fong, Executive Director, Rogue Workforce Partnership

Sherri Emitte, Director of Administration, Rogue Workforce Partnership (via video conference)

Aurora King, Rogue Workforce Partnership

Julie Gillis, Rogue Workforce Partnership

David Fricke, Rogue Workforce Partnership

Tami Allison, Rogue Workforce Partnership

Quorum Present: No

1) Call to Order

A quorum was not present at today's meeting. The meeting started at 10:05 a.m.

2) Election of Officers

DUE TO THE LACK OF A QUORUM, ELECTION OF OFFICERS WILL BE TABLED TO THE NEXT MEETING.

3) Corporate Directors - New Membership Appointments

DUE TO THE LACK OF A QUORUM, NEW MEMBERSHIP APPOINTMENTS WILL BE TABLED TO THE NEXT MEETING.

4) Consent Agenda

DUE TO THE LACK OF A QUORUM, THE CONSENT AGENDA ITEMS WILL BE TABLED TO THE NEXT MEETING.

5) RWP - Workforce Board March 8th Meeting - Agenda Prep

The following agenda was drafted for the next Workforce Board meeting:

- Elect Chair & Vice-Chair
- Dashboard Update
 - Talent Pool Workgroup Update
- RAMP Update
 - Survey results
- Address length of quarterly meetings
- Oregon Connections Rollout
- Board Orientation Materials Update
 - Board member sign in/tracking of their involvement
 - Board members list their affiliations in real time
- Legislative Updates

During discussion it was indicated that many people are unable to make the March 8, 2017 Workforce Board meeting. It was decided to cancel it and poll the members to arrive at a date in April.

Also discussed was the length of the quarterly board meetings and would it be beneficial to shorten them? There was mixed feeling about this among the members present, and it was decided that this will be an agenda topic for the next workforce board meeting. Front loading the agenda with the action items and other important information items was also suggested so members could leave early if they needed to.

The discussion moved to more of a focus on our current board members, the other affiliations they have in the community, and the benefit of having that information to not only drive strategic planning, but to also target board recruitment. The group decided to have a real time exercise at the next workforce board meeting to have members list their affiliations. Several different ways to eventually graphically present this information were discussed; however, the group decided to first look at the information we receive and then see how best to present the information.

Also, forward thinking on the economy – what does it mean to be relevant as a workforce board? – how are we skilling people up? was suggested as a future (not the next workforce board meeting) agenda item.

6) Other Items

There were no other items brought before the Rogue Workforce Partnership Corporate Directors.

7) Adjourn

The meeting ended at 10:52 am.

Respectfully Submitted,

Tami Allison
Executive Projects Manager



TITLE: DISLOCATED WORKER ELIGIBILITY

PURPOSE

To convey expectations for the enrollment of dislocated workers into services funded under Title I of the Workforce Innovation and Opportunity Act (WIOA) Sections 131 and 134.

REFERENCES

- WIOA Sections 131 and 134
- Oregon Joint Policy 03-20 Revision 2
- Oregon WIOA policy 134(c) Career and Training Services

POLICY

In order to support Oregon's approach to integrated service delivery, eligible dislocated workers who come to physical one-stop centers will be co-enrolled into the WIOA Wagner-Peyser and Title I Adult programs in order to provide these customers with an assessment of their skills and attractive services that will enhance their skills as part of their job search efforts.

Eligible Dislocated Worker must meet the criteria as defined below. In regard to the eligibility condition that requires individuals to be "unlikely to return to their previous industry or occupation", the state has determined that due to the economy and high state unemployment rate, all eligible registrants who are unemployed and who have been laid off from their jobs are deemed unlikely to return to their previous industry or occupation, as documented in Oregon Joint Policy 03-20 Revision 2.

PROCESS

- Workforce professionals will utilize definition of Dislocated Worker and the WorkSource Oregon Management Information System (WOMIS) Customer Registration System to register, determine eligibility, and initiate participation of dislocated workers based on self-attestation as described in Joint Policy 03-20 revision 2.
- Documentation of certain participant eligibility elements must occur in I-Trac prior to an Individualized Career Service, a Support Service, or a Training Service being delivered to eligible dislocated workers as defined in Oregon WIOA policy 134(c) Career and Training Services.

DEFINITIONS

- Dislocated Worker:** The term "dislocated worker" means an individual who:
 - Has been terminated or laid off, or who has received a notice of termination or layoff, from employment; is eligible for or has exhausted entitlement to unemployment compensation; or has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that was not covered under a State unemployment compensation law; and is unlikely to return to a previous industry or occupation. *Oregon has determined that due to the economy's high state*

of the unemployment rate, all eligible registrants who are unemployed and who have been laid off from their jobs are deemed unlikely to return to their previous industry or occupation.

The following characteristics also apply (if an individual):

- Has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise; is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days; or is employed at a facility at which the employer has made a general announcement that such facility will close.
- Was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters;
- Is a displaced homemaker; or
- Is the spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or is the spouse of a member of the Armed Forces on active duty and who meets the criteria described in WIOA Section 134, paragraph (16)(B).

A copy of this policy may be found at www.rogueworkforce.org.

Approved: _____

Date: _____



TITLE: PRIORITY OF SERVICE

PURPOSE

To direct Workforce Innovation and Opportunity Act (WIOA) funds to those most in need, while complying with U.S. Department of Labor Priority of Service requirements for Veterans.

BACKGROUND

Priority of Service occurs when a covered individual is given priority over non-covered individuals for the receipt of employment, training and placement services provided under WIOA. These individuals are entitled to precedence over non-covered persons for services – the covered individual either receives access to a service earlier in time than a non-covered person or, if resources are limited, receives access to the service instead of or before the non-covered person.

TEGL 10-09 states recipients (and sub-recipients) of U.S. Department of Labor (DOL) funds are subject to the priority of service regulations, and are thus required by law to provide priority of service to veterans and eligible spouses. This is a requirement of receiving DOL funds. It is important to note that a veteran or eligible spouse must first meet any and all of the eligibility criteria in order to be considered eligible for enrollment in the program, receipt of priority for enrollment and priority for receipt of services.

In addition, WIOA requires when funds allocated for Adult Employment and Training activities are limited, priority shall be given to recipients of public assistance, individuals who are basic skills deficient, and other low-income individuals for Individualized Career Services and Training. The public assistance and low-income priority does not apply to Dislocated Worker funds.

WIOA Adult Formula funds are limited; therefore, Priority of Service must be given to recipients of public assistance, individuals who are basic skills deficient, and other low-income adults for WIOA Adult Formula funded Employment and Training activities.

REFERENCES

Workforce Innovation and Opportunity Act Section 134(c)(3)(E)
20 CFR 680.600
TEGL 10-09 Priority of Service for Veterans and Eligible Spouses
WSO Joint Policy 02-12 Priority of Service for Veterans

POLICY

To address the requirement of the WIOA, Rogue Workforce Partnership is establishing the following prioritization for services:

Low Income: In times that funds are limited, career and training services, priority must be given to eligible individuals that are low income and for which you have documentation stating low income status. Implementation of Priority of Service will be given to eligible low income individual first.

Basic Skills Deficient: In times that funds are limited, priority must be given to individuals who are basic skills deficient. Individuals who are basic skills deficient are defined in WIOA Section 3(5)(B) as an individual who is a youth or adult, who is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society.

Veterans: For workforce programs that operate or deliver services to the public without targeting specific groups, veterans and eligible spouses must receive priority of service over all other program participants. For Programs with Eligibility Criteria, veterans and eligible spouses who meet the eligibility criteria will receive priority for enrollment in the program, as well as priority for receipt of services. (i.e. Adult and DW intensive services, NEGs and any other programs that has eligibility requirements). For programs with statutory or mandatory priorities (such as programs/grants that have specific populations that are allowable to be served in the grant), priority of service is applied as described below:

1. Veterans and eligible spouses who meet the program-specific mandatory priorities will receive the highest level of priority of service.
2. Non-covered individuals who meet the program's mandatory priority receive the second level of priority of service.
3. Veterans and eligible spouses outside the program-specific mandatory priority receive the third level of priority of service.
4. Non-covered individuals outside the program's mandatory priority receive the lowest level of priority of service.

A copy of this policy may be found at www.rogueworkforce.org

Approved by: _____

Date: _____



TITLE: PERSONAL IDENTIFIABLE INFORMATION

PURPOSE

To establish guidelines and instructions related to the protection of confidential job seeker, employer and wage information, in carrying out official duties for the workforce system. This policy identifies sources of confidential information and establishes procedures for safe handling of this information.

BACKGROUND

The Office of Management and Budget defines Personally Identifiable Information (PIII) as information that can be used to distinguish or trace an individual's identity, either alone or when combined with other personal identifying information that is linked or linkable to a specific individual. Examples of protected PII include, but are not limited to, social security numbers (SSN), credit card numbers, bank account numbers, ages, birthdates, medical history, financial history and computer passwords.

As an important and inherent part of the services provided to customers, service providers and WorkSource staff must necessarily collect a wide variety of PII from customers. While the information collected as a matter of routine is often critical to effectively serving customers and providing them with the best possible services, collection of PII also brings with it a statutory responsibility to safeguard customers' PII from unauthorized use or disclosure.

REFERENCES

TEGL 39-11 Handling and Protection of Personally Identifiable Information (PII)
2 CFR 200.79 Personally Identifiable Information
WSO Joint Policy 01-08 Confidentiality and Access to Information and Data
Oregon Revised Statutes §192.001, §162.425, §657.665, §676.177, and §660.339
Oregon Administrative Rules 471-010-0105, 589-020.0320 and 589-020-0330

POLICY

Although an employee may be authorized to access confidential data, the employee may access the data only in connection with the performance of his/her official duties.

Confidential PII records include entire record systems, specific records or individually identifiable data that are not subject to public disclosure under Oregon Revised Statutes 192, and may include all documents, participant file content, computer files, letters, and other notations of records or data.

Documents that contain PII (participants' or family members') social security numbers, driver's license, birth certificates, I-9 documents, TANF/FSUP, etc., must be stored in a confidential, locked file cabinet which is only accessible by appropriate staff, kept separate from the working files. The working file may not contain any PII documents.

Computers that have access to customer data must be locked when not in use and anytime a staff person is away from their workstation.

In Oregon, electronic participant information is stored in the WorkSource Oregon Management Information System (WOMIS) on servers maintained by Oregon Employment Department and administered under the rules of the Oregon Department of Administrative Services. Information is also stored in I-Trac which is administered by Worksystems, Inc. Access to these systems and their data is restricted to individuals who have successfully completed DAS Information Security Testing and I-Trac User and Confidentiality Training. All staff with access to either system must follow the procedures set out by the administering agency. Electronic information and data is subject to all the requirements of this policy.

A copy of this policy may be found at www.rogueworkforce.org.

Approved by: _____

Date: _____



TITLE: ENTREPRENEURIAL TRAINING

PURPOSE

To ensure that entrepreneurial training is available to all WIOA Title I funded participants.

BACKGROUND

Section 134(c)(3)(D)(vii) of the Workforce Innovation and Opportunity Act (WIOA) cites “entrepreneurial training” as an allowable training service for adults and dislocated workers and requires local workforce development boards to make this training available to interested job seekers.

REFERENCE

Section 134(c)(3)(D)(vii) of the Workforce Innovation and Opportunity Act (WIOA)

POLICY

Individuals eligible for services funded with WIOA Title I Adult and/or Dislocated Worker funds must be provided the opportunity to enroll in entrepreneurial training programs as they are provided the opportunity to enroll in other WIOA-funded training, which is consistent with WIOA customer choice principles.

PLANNING CONSIDERATIONS

All WIOA Adult and Dislocated Worker Service Providers will provide information on local training options for entrepreneurial training throughout the local WorkSource system to both staff and customers. Service provider staff will continue to include self-employment as an option for individuals eligible for WIOA Title I funded training and provide additional specific information regarding community organizations that work with those who are interested in starting businesses and self-employment.

Available opportunities to share program options include, but are not limited to:

- Coursework options at local community colleges
- Training options available at other approved providers
- Information available at local WorkSource offices
- Hotlinks and referral to self-employment organizations offering specific business start-up information and assistance

Courses already on the Eligible Training Providers List (ETPL) will be immediately available to individual’s eligible to receive training funded by WIOA Title I, where appropriate. Training Providers not on the ETPL will be encouraged to submit an application as outlined in the ETPL Policy. Entrepreneurial

coursework should provide adequate information for the WIOA funded participant to begin business startup.

A variety of entrepreneurship training and self-employment resources are identified on Attachment 1.

A copy of this policy may be found at www.rogueworkforce.org.

Approved by: _____

Date: _____



TITLE: TRAVEL & EXPENSE REIMBURSEMENT

PURPOSE

The policy clarifies allowable travel and business expenses and the process for reporting credit card expenditures, and applying for reimbursement.

POLICY

A Rogue Workforce Partnership (RWP) business credit card should be used whenever possible to cover travel and other business-related expenses. In instances when this is not a viable option, personal resources may be used and a Reimbursement Request form (Attachment A) submitted for reimbursement. Prior approval must be received for reimbursement to be allowed (with the exception of mileage).

The traveler is responsible for complying with the Travel and Expense Reimbursement policy at a reasonable level of service and comfort at the lowest possible cost. Travelers must submit any approved Credit Card Expenditure form (Attachment B) or Reimbursement Request form, along with the appropriate receipt(s) and meeting/event documentation/agenda and attendance at meeting (if appropriate), within 10 days following the completion of the trip or incurring the expense.

MILEAGE

Local travel for official purposes is reimbursable, and shall begin and end at the assigned work location. Travel must be the most direct route. Travel from an employee's home to and from the employee's assigned work location is not reimbursable.

Because business travel will require the use of the employee's personal vehicle, personal auto insurance of at least the minimum amount required by the State of Oregon will be required. A copy of the coverage summary page of your auto insurance policy, as well as a copy of your driver's license, must be provided to the Executive Project Manager for the file.

The request for mileage reimbursement will be submitted monthly with the monthly timesheet.

Mileage is reimbursed at the federally approved rate, which may be found at <https://www.irs.gov/tax-professionals/standard-mileage-rates/>. For longer trips (farther than 150-200 miles), employees have the option of either using a rental car or their own personal vehicle. Before this decision is made, the Executive Project Manager will complete an "Assessment of Driving a Personal Car vs Rental Car" (Attachment C) in order to determine the maximum that will be reimbursed.

Since RWP has the appropriate insurance coverage for hired vehicles driven on company business, no reimbursement will be provided for any additional insurance through the rental car company.

MEALS

The cost of meals will be reimbursed according to the following guidelines. An individual is considered on "travel status" from the time they start from, and return to, their assigned work location.

- Breakfast – Staff must be on travel status for two hours or more before the beginning of their scheduled shift to receive reimbursement for breakfast.
- Lunch – No reimbursement is provided for lunch during non-overnight travel unless the employee is attending an official business meeting, the meal is an agenda item that is not included in the fee, and the cost and choice of having the meal were beyond the control of the employee.
- Dinner – Staff must be on travel status for two hours or more beyond the end of their scheduled work shift to receive reimbursement for dinner.

The maximum amount that will be reimbursed per meal is determined by the maximum allowed per meal and by location in the federal per diem allowance chart found at <https://www.gsa.gov/portal/content/104877>.

Both the detailed receipt listing items ordered, as well as the credit card receipt including tip, must be submitted with the Credit Card Expenditure or Reimbursement Request form. The cost for any alcoholic beverage and prorated tip must be deducted from the total cost.

AIRLINE TRAVEL

If airline travel is required, all staff will fly coach class unless the difference is paid with the traveler's personal funds. Fees incurred for baggage that would be appropriate for the length of stay will be reimbursable.

Airline and conference fees may be arranged and paid for by the Executive Project Manager, if the employee desires.

NON-REIMBURSABLE EXPENSES

Expense items not reimbursable under this policy:

- Parking tickets or other fines
- Alcoholic beverages
- Delinquency fees / finance charges for personal credit cards
- Excess baggage charges
- Expenses for travel incurred by companions / family members
- Expenses related to vacation or personal days while on a business trip
- Loss / Theft of personal funds or property / Lost baggage
- Avoidable "No-Show" charges for hotel or car service

- Non-compulsory insurance coverage
- Rental car upgrades
- Repairs due to accidents
- Mini-bar charges

Approved by: _____

Date: _____

REIMBURSEMENT REQUEST

EMPLOYEE: Employee Name

AMOUNT: \$13.50

DATE: 2/21/2017

COMPANY: Tasty Café

FOR: Dinner in Salem -- WIOA Training (2/21-22)

FUND: Training & Transition Fund

EMPL SIGNATURE: (Signature)

DATE: 2/22/2017

APPROVED BY: (Signature)

DATE: 2/23/2017

CREDIT CARD EXPENDITURE

EMPLOYEE: Employee Name

AMOUNT: \$ 152.50

DATE: 2/21/2017

COMPANY: Grand Hotel

FOR: Trip to Salem for WIOA Training (2/21-2/22/17)

FUND: Training & Transition Fund

EMPL SIGNATURE: (Signature)

DATE: 2/22/2017

APPROVED BY: (Signature)

DATE: 2/23/2017

CREDIT CARD EXPENDITURE

EMPLOYEE: Sherri Emitte

AMOUNT: \$ 3.99

DATE: 9/21/2016

COMPANY: Taco Bell

FOR: Food

FUND: Admin

EMPL SIGNATURE: Sherri Emitte

DATE: 9/21/2016

APPROVED BY: _____

DATE: _____

CREDIT CARD EXPENDITURE

EMPLOYEE: Sherri Emitte

AMOUNT: \$ 5.00

DATE: 9/23/2016

COMPANY: Fred Meyer Fuel Stop

FOR: Gas

FUND: Admin

EMPL SIGNATURE: Sherri Emitte

DATE: 9/23/2016

APPROVED BY:

DATE:

CREDIT CARD EXPENDITURE

EMPLOYEE: Sherri Emitte

AMOUNT: \$ 214.01

DATE: 9/24/2016

COMPANY: Enterprise Rent a Car

FOR: Transportation

FUND: Admin

EMPL SIGNATURE: Sherri Emitte

DATE: 9/24/2016

APPROVED BY: _____

DATE: _____

**ASSESSMENT OF DRIVING A
PERSONAL CAR vs RENTAL CAR (2017)**

Ending destination:	Salem
Round-trip mileage (per Google Map):	230
Rental car (per day):	\$ 40.00
# of rental car days:	3
Rental car Average MPG:	30
Average Current Fuel Price per Gallon:	\$ 2.34

TOTAL COST FOR RENTAL CAR:

Rental car	\$ 120.00	
Fuel	\$ 17.93	
Total Cost of Rental Car		<u>\$ 137.93</u>

TOTAL COST FOR PERSONAL CAR:

At \$0.535/mi	<u>\$ 123.05</u>
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MAXIMUM TO BE REIMBURSED	<u>\$ 123.05</u>
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Use Butler Super Saver Rent-A-Car for determining cost per day	\$30
Use Oregongasprices.com (ashland) and take the average of low-mid range	