




Thursday June 15, 2017 • 2:00-5:00 p.m. | Pacific Retirement Services -1 W. Main Street, Third Floor Washington Room, Medford, OR

## Agenda

[illegible]

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 = Documents attached or will be handed out at meeting

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



## ROGUE WORKFORCE PARTNERSHIP

### MINUTES

#### ROGUE WORKFORCE PARTNERSHIP WORKFORCE DEVELOPMENT BOARD

April 27, 2017

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

#### MEMBERS PRESENT:

Matt Balkwill, Scott Beveridge, Lance Corley, Mike Donnelly, Jessica Gomez, Catherine Goslin, Shawn Hogan\*, Nikki Jones, Brent Kell, Cathy Kemper-Pelle, Joe Myers, Kim Oveson, Colleen Padilla, Linda Schott, John Underwood, Trever Yarrish, Drew Waits

\*= *via phone/videoconference*

#### QUORUM PRESENT: Yes

#### OTHERS ATTENDING:

*Jackson County Commissioner:* Rick Dyer

*Community College & Workforce Development:* John Asher\*

*State of Oregon Vocational Rehabilitation* – Kari Kingsolver, Daniel Wilson

*ResCare Workforce Services:* Matt Sneed

*Southern Oregon Success* - Peter Buckley

*WorkSource Rogue Valley Employment Department:* Tamara Schroeder, Roxanne Hurst, Ross Jesswein, Josh Morell, Bambi Bevill

*WorkSource Rogue Valley ResCare:* Tabitha Carlson, Devi-Ana Stone, Tina Berry, Cynthia Ragsdale

*Junior Achievement* – Deanna Wilson

*College Dreams* - Jen Perry

*City of Eagle Point* – Jonathan Bilden

*BBSI-* Joe Rossi

*Rogue Workforce Partnership:* Dana Shumate, Aurora King, Tami Allison, Jim Fong

#### **1) CALL TO ORDER, WELCOME & INTRODUCTIONS**

The Board meeting was called to order by Chair Jessica Gomez at 2:06 p.m. A round of introductions were made.

#### **2) HONORING GREGG EDWARDS**

Gregg was unable to attend today. This item will be deferred to a future meeting.

#### **3) ELECT CHAIR & VICE-CHAIR**

**CATHY KEMPER-PELLE MOVED TO APPROVE THE ELECTION OF JESSICA GOMEZ AS CHAIR AND MICHAEL DONNELLY AS VICE CHAIR OF THE ROGUE WORKFORCE PARTNERSHIP WORKFORCE DEVELOPMENT BOARD. THE MOTION WAS SECONDED BY JOHN UNDERWOOD.**

Discussion: Colleen Padilla inquired as to whether today's meeting was the annual meeting as it states in the bylaws that is when the chair and vice-chair are elected. Colleen also inquired about the process for how the "slate of nominees" that are mentioned are nominated and elected. It was Colleen's suggestion that the bylaws be revised to reflect what is currently being done.

**THE MOTION PASSED WITH COLLEEN PADILLA VOTING NO.**

#### 4) CONSENT AGENDA

Colleen Padilla asked that both items a. and b. be removed from the consent agenda and acted on separately.

**Approval of Minutes** - December 15, 2016 Board meeting minutes. **MIKE DONNELLY MOVED TO APPROVE THE MINUTES OF THE DECEMBER 15, 2016 BOARD MEETING. THE MOTION WAS SECONDED BY NIKKI JONES AND APPROVED UNANIMOUSLY.**

**Approval of RWP Program Policies** - Colleen raised concern regarding the timeliness of information being received by board members in order to review prior to the meeting. Chair Jessica Gomez deferred the approval of program policies (Incentives/Stipends and Code of Conduct) to a future meeting.

The group had discussion regarding the policies and more specifically whether or not board members could sign the Code of Conduct policy acknowledgement today. It was suggested that this item be deferred to a future meeting of the Corporate Directors.

#### 5) WORKFORCE SYSTEM

**Adult/Dislocated Worker (DLW) Transfer of Funds** – Twenty months of data was presented reporting the number of Adult and DLW participants being served. The Adult portion continually hovers around 200 people per month, while the DLW portion varies greatly. Even though the unemployment rate is hovering at an average of 4-5%, we still have many folks who are facing unemployment due to greater obstacles. As a result, we have consistently seen around 75% of the WIOA Adult participants qualify for DLW services, with the remaining 25% meeting Adult-only eligibility criteria. As a result, the DLW allocation has been expended more rapidly than anticipated.

John Asher, CCWD, stated that he appreciated that we are realizing that the unemployed are coming to us with a lot more barriers and that we have to look at providing services differently. John added that this it was not an uncommon request to transfer funds, and that the Federal government allows for this ability.

RWP is requesting a plan modification in the amount of \$560,000 from Adult to Dislocated Worker.

**NIKKI JONES MOVED TO APPROVE THE TRANSFER OF ADULT FUNDS TO DISLOCATED WORKER IN THE AMOUNT OF \$560,000. THE MOTION WAS SECONDED BY BRENT KELL AND WAS APPROVED UNANIMOUSLY.**

**Memorandum of Understanding / Cost Sharing & One-Stop Operator Procurement** – Jim indicated that we are working on these items that must be complete by June 30, 2017 and will bring more information back to the Board as it is available.

**Dashboard** – Aurora presented a Dashboard Snapshot to the group and indicated that the data is centric to WSRV and the data currently available. It is the intent for the future to be inclusive of other workforce system service providers as well to create a more comprehensive report card. Jim added that the ultimate goal is to link all of the available service output and outcome data to the OED wage data to create longitudinal views of customers and their long term success rates in jobs and career progression.

Discussion took place on how the data aligns with the six core measures in the federal law, and whether we are providing the Workforce Board with the proper information. The six core measures are lagging indicators and are available at [www.qualityinfo.org](http://www.qualityinfo.org). Our dashboard is looking at leading indicators. The Workforce Board needs to see both. Jessica indicated that while there is a requirement to measure those core items, there is also other data that helps us in significant alignment with our partners. “Our Board is not just WIOA, but a hub to coordinate all the other resources in the community, and we do not currently have an aligned system that will allow us to collect this other data,” Jessica stated. It was decided that this conversation will be discussed further at a future Local Leadership Team meeting, and appropriate report out and/or recommendations will be brought back the Corporate Directors and the Workforce Board.

Jessica indicated that the board will be looking at these numbers at each quarterly meeting in the hope of seeing trends. If anyone has any comments or questions, please contact Jim Fong.

## 6) SOUTHERN OREGON CAREER NETWORKING EXPO

Approximately 50 employers will be participating in the first Southern Oregon Career Networking Expo (SOCNE) on Saturday May 13, 2017 9 a.m. to 1 p.m. at the Jackson County Expo Olsrud Pavilion. The hope is that at least 500 customers are scheduled to attend this event. PSA’s on the radio should have started yesterday.

## 7) BUSINESS & EDUCATION PARTNERSHIP

This item was deferred to a future meeting.

## 8) LEGISLATIVE / POLICY UPDATES

This item was deferred to a future meeting.

## 9) RWP MEMBER ORIENTATION

The Board participated in a group orientation. An orientation packet was distributed to board members and was reviewed in the group setting.

Discussion took place regarding which board is subordinate to which, between the Corporate Directors and the Workforce Board. Jim indicated that the organizational structure is not hierarchical, and that each body has different roles and responsibilities in relationship to each other. A number of members expressed the need for greater clarification in this relationship to alleviate confusion. An additional request was for greater clarification to understand the difference between the Rogue Valley Workforce Consortium (RVWC), the Corporate Directors and the Workforce Board. Jim explained that the RVWC are the two designated County Commissioners who appoint the Workforce Board members, plus the Commissioners are also members of the Corporate Directors. Jessica suggested connecting what is in the bylaws with a visual picture, as well as one-on-one meetings with members to gain clarity. RWP staff will review and suggest any needed revision in the bylaws or our current practice to provide greater clarity in these areas.

The RWP staff is also charged with developing a budget for Workforce Board activities. RWP staff indicated that a budget would be presented at the next board meeting. We've been in a transition year and time period as we step more fully into all of the new federal requirements of WIOA. With our new bylaws just amended in December 2016, we're now getting on cycle to accomplish our annual duties. Up till now we've had the Corporate Directors review and approve this budget.

In addition, in fulfillment of its workforce systems oversight and alignment role, the Workforce Board needs to review all the public resources and "inputs" that fund our region's workforce system. "The group is charged with aligning the workforce system, but is not in direct control of all the different workforce agency or partner organization budgets," Jim stated. As we look at the workforce system's activities and results, the Workforce Board also needs to look at what investment are being made into the system

It was also suggested that we have membership terms listed on the website, as well as email addresses for members as contact information. The board members felt okay with this; however, they may give a separate email. It was decided to poll the members not here today for their input.

Current board members were asked to share about the value they see in being a member of the workforce board. In addition, new board members were asked for their thoughts and their motivation around joining the Workforce Board.

Lance Corley, Joe Myers and Drew Waits each shared their motivation for joining, and how the need to fill the talent and training pipeline is their top concern, especially with so many workers in the trades retiring and a decrease in interest and enrollment in apprenticeship programs. They want to leverage their organization's capacities to help fill this skills and talent pipeline.

## 10) BOARD MEMBER AFFILIATIONS REPORT OUT

This item was deferred to a future meeting.

## 11) SECTOR STRATEGIES | COLLEGE & CAREER FOR ALL | WORKFORCE PARTNERSHIPS

**Careers in Gear Update** - The 7<sup>th</sup> Annual Event took place in March 2017 and was attended by 1124 students from 16 schools. Fifty-four booths were on site as well as 38 table talk volunteers. Overall, a tremendous success. Quantum Innovations donated at \$250 cash card and John Underwood drew a student's name today who will receive that gift. Next year's event will be held on March 15, 2018.

**Oregon Connections** - Oregon Connections is a statewide online matching platform for businesses to post opportunities for industry tours, job shadows, internships, class presentations, etc., and for schools / WSRV to post requests for the same. Pilot rollout is taking place in Medford and Grants Pass School Districts, and operational standards are being created for schools so that students get needed classroom career readiness instruction, preparation and support, and are prepared to benefit from these Career Related Learning Experiences.

## 12) PROPOSED JUNE MEETING AGENDA

- Items deferred from today's agenda
- More dashboard review
- On-the-Job Training Policy Change
- Sectors Update
- Interactive Activity to Update Local Strategic Plan (planning Fiesta)
- Financials
- Bylaws and governance structure chart

The next meeting will be held on June 15, 2017. The meeting will be kept to three hours with the possibility of prep work taking place between meetings.

## 13) OTHER BUSINESS

No other items were brought before the Rogue Workforce Partnership.

## 14) ADJOURN

With no further discussion, the meeting was adjourned at 5:02 p.m.

Respectfully Submitted,

Tami Allison  
Senior Project Manager  
/tka

APPROVED:

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Chair

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Date





## **ACTION BRIEF**

DATE: June 15, 2017

TO: Rogue Workforce Partnership – Workforce Development Board

FROM: Aurora King, Chief Operating Officer

SUBJECT: Policy Update for On-the-Job Training

## **BACKGROUND**

The purpose of an On-the-Job Training contract (OJT) is to assist businesses in training and retaining skilled, productive workers. Through the OJT contract and training plan, occupational training is provided for the participant in exchange for the reimbursement of up to 50 percent of the wages paid during the training period. OJT's may be used to help train new employees, eligible current employees, and employees hired to regular permanent employment through a staffing service relationship. Rogue Workforce Partnership's current policy states that the minimum wage required for a business to engage in an OJT contract for a new or existing employee is \$10.00 per hour with benefits, and a preferred minimum of \$11.00 per hour without benefits. This policy applies all recipients, sub-recipients, and any other authorized provider of WIOA Title IB training funds.

Enacted by the 2016 Oregon Legislature, Senate Bill 1532 establishes a series of annual minimum wage rate increases beginning July 1, 2016 through July 1, 2022. The planned increases for our two counties are as follows:

Date	Standard
January 1, 2016	\$ 9.25
July 1, 2016	\$ 9.75
July 1, 2017	\$10.25
July 1, 2018	\$10.75
July 1, 2019	\$11.25
July 1, 2020	\$12.00
July 1, 2021	\$12.75
July 1, 2022	\$13.50

Data shows that over the last program year (July 1, 2016-June 30, 2017), the average wage of OJT placements was \$14.55, and 57 out 161 (35%) of placements were made at \$10-\$12.00/hour.

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**RECOMMENDATION**

As a result of the planned minimum wage increase, as well as taking into account the OJT wage trend information, staff recommends that the Rogue Workforce Development Board approves the attached On-the-Job Training policy with the updated minimum training wage and language.



**TITLE: ON-THE-JOB TRAINING POLICY**

**Purpose**

To provide guidance for the On-the-Job Training (OJT) service activity for Title 1 Adult, and Dislocated Workers (DW) in Jackson and Josephine Counties, funded under the Workforce Innovation and Opportunity Act (WIOA), as well other funds allocated for OJT's.

**References**

Governing guidelines include WIOA 134(c)(3)(D) ii, CFR 680.700-680.710, as well as applicable state and local funding stream requirements for On-the-Job Training.

**Scope**

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

**Policy**

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

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

- Has a wage of at least \$11.00 per hour;
- Is at least 30 work hours or more per week;
- Offers benefits to the employee. (If no medical benefits are offered, it's preferred that the job pay at least \$12.00 per hour.)
- Has a training period for no less than 4 weeks and no more than 26 weeks (or six months) and;

- Is preferred to be an in-demand industry sector or occupation that falls in the local region's sector strategies, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare, or as determined to be in demand by the support of local labor market information.

OJT contracts may be written for eligible employed workers when:

- The employee is not earning a self-sufficient wage or wages comparable to or higher than wages from previous employment; or
- The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills; workplace literacy; or
- The OJT facilitates a wage gain of at least \$1.00 per hour or more by the end of the training period or sooner, and
- Results in an upgrade to a new position with a different scope of work and title.

An exception may be granted by Rogue Workforce Partnership. Examples of exceptions might include (but are not limited to) a worker who has a disability and requires retraining, medical benefits and regular employment status are gained as a result of the training, or a layoff can be averted through retraining.

Additional preferences includes the following:

- Employer will "backfill" with a new hire for the employee's previous position through WorkSource Rogue Valley when training is complete; or
- Employer offers concurrent skill building opportunities for the employee to access; or
- Business falls within a "traded-sector" industry.

Only businesses with a history of successful training and retention of OJT employees should be used as repeat OJT sites. Employers that use OJT to subsidize short-term "revolving door" positions will be decertified as OJT sites. For the purposes of re-contracting and "pattern of failure" considerations, additional OJT agreements and/or training plans should not generally be negotiated with any business that, having had five or more previous OJT training plans:

- Does not meet an employment (retention) rate of 75%.
- Exception: When a business does not meet the employment rate of 75% for five or more trainees but agrees to a corrective action plan that addresses the identified problems, additional OJT training plans can be approved on an interim basis after the corrective action plan has received administrative approval from the Rogue Workforce Partnership. Absent an approved corrective action plan, a business that has been determined to exhibit a pattern of failure to retain trainees will be decertified as an OJT site for a limited duration of two years.
- Such corrective action decisions should take into account the circumstances of trainees who have failed to complete training or have not been retained for 90 days or longer following training. A pattern of failure determination is generally not made until at least five OJT training plans have expired. Efforts should be made to determine why trainees failed to complete.

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

APPROVED : \_\_\_\_\_  
RWP Chair

DATE: \_\_\_\_\_

	Questions	Bylaws	Current / Recent Practice	Potential Changes / Clarifications
A	<p><b>Election of Officers to be done at annual meeting</b> Bylaws Article III E 2, Article IV D</p> <p><i>Q: Is the timing of the election of officers being done in conformance with our bylaws?</i></p> <p><i>A: We're in the midst of transitioning our practice to the new Bylaws which were just approved in December, we're in a transition year.</i></p>	Newly approved Bylaws indicate election is to done at "the first regular meeting where a quorum is reached on or after July 1 of each year"	Most recent practice has been to elect officers at first meeting of the calendar year of either Corporate Directors or Workforce Board. Other group then affirms the initial election of the initiating group.	<p>Recommendations:</p> <ul style="list-style-type: none"> <li>▸ Revise Bylaws to have Corporate Directors elect officers 1<sup>st</sup>, then have Workforce Board affirm and vote in the same slate of officers. This would help to alleviate the sense of confusion expressed about which group is subservient the other.</li> <li>▸ Regarding timing of officer election - we are in a transition year. Next officer election would be on or after July 1, 2018; use FY 17-18 as a transition year, honor recent election through 1<sup>st</sup> meeting on or after July 1, 2018.</li> </ul>
B	<p><b>Solicit and Recommend slate of officer candidates for workforce board.</b> Bylaws Article V B</p> <p><i>Q: Are we following the appropriate process for soliciting and recommending slate of officer candidates for workforce board?</i></p> <p><i>A: Yes, the Corporate Directors are following the prescribed requirements of recommending a slate of officer candidates to the Workforce Board.</i></p>	Corporate Directors act as the workforce board's nominating committee and shall solicit and recommend a slate of officer candidates	Past and current practice conforms to new bylaws - this has been done verbally, via staff, from the Corporate Directors to the Workforce Board.	No changes needed to comply with Bylaws.
C	<p><b>Number of members on Corporate Directors</b> Bylaws Article III A</p> <p><i>Q: Are we following the appropriate process for filling membership on the Corporate Directors? How is this being communicated to the Workforce Board?</i></p> <p><i>A: Yes, the Corporate Directors are following the prescribed requirements for filling Corporate Director positions. Communication to the Workforce Board has been through updates to the "RWP Membership &amp; Positions" document which denotes those business members who serve on as Corporate Directors.</i></p>	<p>Corporation has 7-9 Corporate Directors</p> <ul style="list-style-type: none"> <li>• Workforce board chair and vice-chair (2)</li> <li>• One county commissioner from Jackson County and one county commissioner from Josephine County (2)</li> <li>• Between 3-5 additional directors shall be private sector Workforce Board members selected by the Corporate Directors</li> </ul>	Past and current practice conforms to new Bylaws.	<p>No changes needed to comply with Bylaws.</p> <p>Announcements of new Corporate Director appointments can be better verbally highlighted when the "RWP Membership &amp; Positions" document is updated and distributed to the Workforce Board.</p>

	Questions	Bylaws	Current / Recent Practice	Potential Changes / Clarifications
D	<p><b>Meeting Notices to be received 3 days in advance</b>  Bylaws Article III F 1  Bylaws Article III F 2</p> <p><i>Q: Are we conforming to the Bylaws in our sending out meeting notifications, agenda &amp; meeting information packets? Is this providing adequate time for members to review the material prior to the meeting in order to make informed deliberations and decisions?</i></p> <p><i>A: Except for 2 recent meetings – yes, we're sending out agendas &amp; packets with at least 3 days advance of most meetings. The Corporate Directors will need to decide if this is sufficient time for member review.</i></p>	<p>"Meeting notices shall be given at least three (3) days in advance of the date of the meeting unless special circumstances make advance notice impracticable, in which case notice and description of the purpose of the meeting shall be given not less than 24 hours prior to the meeting."</p> <p>"Meeting notices shall contain an agenda of the topics scheduled for consideration."</p>	<p>Practice has predominantly conformed to new bylaws. The bylaws only speak to "meeting notices" and an "agenda of topics scheduled for consideration." They don't currently speak to minutes or other packet material for review.</p> <p>The Dec 2015 and April 2017 meeting agendas and packets were late in distribution due to unavoidable time crunches and preparation constraints. We are taking steps to avoid any future such delays.</p>	<p>Recommendation:</p> <ul style="list-style-type: none"> <li>▸ Ensure minimum conformance with 3 day notification, with an ideal goal of agenda &amp; packets out 7 days prior to meeting.</li> </ul>
E	<p><b>Consent Agenda minutes should reflect the approved items from the consent agenda</b></p>	<p>Not required in the bylaws.</p>	<p>Currently, minutes do not reflect the specific items approved within the consent agenda.</p>	<p>There is no statutory or legal requirement, but as a best practice, we will include the titles of the items within the consent agenda in the minutes.</p>
F	<p><b>Change in Policies requires information be received seven (7) days in advance</b></p> <p><i>Q: Are we conforming to the bylaws requirement for 7 day notice prior to changes in policies?</i></p> <p><i>A: There is no such requirement in the bylaws.</i></p>	<p>There is no mention in bylaws that policies must be received for review seven (7) days in advance.</p> <p>The only mention of a seven (7) days notification is under Article VII: Amendment, and relates solely to bylaw amendment or repeal.</p>	<p>Currently policies are brought before either the Corporate Directors and/or Workforce Board depending upon timeliness of action required, and are included in agenda packets that are sent out prior to the meeting.</p>	<p>No changes needed to comply with Bylaws.</p> <p>To clarify roles, we will implement the following practice: Corporate Directors, having responsibility for all financial and operational decisions, will approve all policies. These policies will be shared at the following Workforce Board meeting. If the Corporate Directors choose, they may present certain policies for discussion and approval at the following Workforce Board meeting.</p>

	Questions	Bylaws	Current / Recent Practice	Potential Changes / Clarifications
G	<p><b>Which board is subordinate</b></p> <p><i>Q: Is there a dominant and subordinate role between the Corporate Directors and the Workforce Board?</i></p> <p><i>A: No. What's unusual (and somewhat confusing) with the RWP is that the Workforce Board is a federally-mandated body with explicit responsibilities in overseeing the regional workforce system. However, the federal law is silent on organizational entity requirements, choosing instead to allow for local determination on this matter. Like us, most regions have chosen to keep the traditional corporate "Board of Directors" role separate and apart from the Workforce Board. We have intentionally vested this responsibility with the Corporate Directors, thus freeing up the Workforce Board to focus exclusively on its federally-mandated responsibilities. We've created membership overlap and an RWP - Executive Committee function for the Corporate Directors, so that the two bodies are closely linked and inter-related. However, the organizational functionalities are markedly different from most non-profit organizations.</i></p>	<p>The bylaws do not speak to a dominant or subordinate role between the Corporate Directors and the Workforce Board.</p> <p>Article II: Purpose – clearly articulates the different scope, roles, and purpose for each group. Other sections describe the working relationship between the two groups.</p> <p>The Workforce Board's purpose is to develop, oversee and implement the Rogue Valley workforce area's strategic plan and to perform the duties listed in the Partnership Agreement and in grant agreements.</p> <p>The Rogue Workforce Partnership (the "Corporation") is a tax-exempt, nonprofit, public benefit corporation that is the fiscal agent, administrative entity and local grant subrecipient for the Rogue Valley workforce area. The Corporation shall make financial and operational decisions necessary to implement the Workforce Board's strategic plan and additional decisions required by WIOA, by the State of Oregon, by the Consortium and by other grants and agreements. The Corporation's duties and functions shall be limited to those permitted by Section 501 (c) (3) of the Internal Revenue Code and by Oregon statutes applicable to nonprofit public benefit corporations.</p>	<p>In our current practice, we:</p> <ul style="list-style-type: none"> <li>Have the Workforce Board focus on the essential functions as mandated by the federal law.</li> <li>Have the Corporate Directors serve as an Executive Committee to steer the Workforce Board meetings and overall coordination efforts, and as a decision-making entity when timely decisions are required that can't wait for a Workforce Board meeting or quorum.</li> <li>Per the Bylaws, the Corporate Directors make all financial and operational decisions</li> </ul>	<p>Staff believe the subordinate / dominate question can best be addressed through clarifying discussion with Workforce Board members. At future meetings, staff and Corporate Directors will review and reinforce the three purposes and 14 key functions of the Workforce Board within the WIOA regulations.</p> <p>Some of the changes addressed above will help to clarify the roles, responsibilities, and working relationships between the Corporate Directors and the Workforce Board.</p> <p>No changes are recommended to the bylaws.</p>
H	<b>Membership terms listed on the contact sheet</b>	N/A	Membership terms are currently not listed on the contact sheet	List membership terms on the contact sheet
I	<b>Suggestion to make RWP member emails available on the RWP website</b>	N/A	Emails currently aren't posted on the RWP website	Staff will poll members to inquire whether RWP members want their emails posted on the RWP website.



	Questions	Bylaws	Current / Recent Practice	Potential Changes / Clarifications
J	Budget	<p>Bylaws Article II Purpose – “The Workforce Board’s purpose is to develop, oversee and implement the Rogue Valley workforce area’s strategic plan and to perform the duties listed in the Partnership Agreement and in grant agreements.”</p> <p>The Partnership Agreement is between Rogue Valley Workforce Consortium (RVWC), Corporate Directors, and Workforce Board.</p> <p>Partnership Agreement 2 A, 3 A –The Corporate Directors and Workforce Board shall “Develop and approve the Rogue Valley workforce area’s strategic plan for submission to the governor and approve the annual workforce board budget subject to approval of the RVWC.”</p>	During this transition time period as we’ve been getting the Workforce Board fully populated and functioning under the new governance configuration, we’ve only brought an annual Workforce Board budget to the Corporate Directors for their review and approval (since June/July 2015).	<p>With the Workforce Board now fully configured, starting this coming FY17-18, RWP staff will develop the budget on behalf of the Corporate Directors and Workforce Board, and will bring it to them and RVWC for approval.</p> <p>Our intention is to display the RWP budget within a table / framework which will allow members to see how these funds are part of a comprehensive array of partner budgets and performance outcomes that comprise the totality of the public workforce and education system.</p>



## **ACTION BRIEF**

DATE: June 15, 2017

TO: Rogue Workforce Partnership – Workforce Development Board

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: FY 16-17 Budget Adjustment Affirmation

## **BACKGROUND**

Last July, the RWP Corporate Board was presented with a budget for the 2016-2017 Program Year. That budget was based upon best estimates of both revenues and expenditures at that time; but as the year has passed, we now have a better sense of what these amounts should be. This budget modification reduces both revenues and expenditures by \$330,094 from the original budget.

This budget modification was approved by the Corporate Board at its May 18, 2017 meeting, and is being presented to the Workforce Development Board for affirmation of that action.

The attached memo, dated May 11, 2017, contains the information provided to the Corporate Board at its meeting, and describes the reasons behind the various adjustments.

## **SUMMARY**

RWP Staff would request that the Workforce Development Board affirm the budget adjustment of (\$330,094) that was approved on May 18, 2017, by the Corporate Board.



DATE: May 11, 2017

TO: RWP Corporate Board

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: PY16 Budget Adjustment

## **BACKGROUND**

Last July, the RWP Corporate Board was presented with a budget for the 2016-2017 Program Year. That budget was based upon best estimates of both revenues and expenditures at that time; but as the year has passed, we now have a better sense of what these amounts should be. The importance of processing this modification is that these would be the final budget amounts used for comparison in the audited financial statements. So closer numbers make for better presentation. This proposed budget modification reduces both revenues and expenditures by \$330,094.

## **REVENUES**

### **WIOA Funds**

In the budget approved last year, we presented the entire allocated amount within each of the funding streams, along with projecting any amounts that would be carried over into the subsequent year. Since these budgeted amounts will be used to compare with actual revenue, and actual revenue is determined by amounts actually used, we are adjusting budgeted revenues to amounts that are projected to be used in this current year.

The largest change to budgeted revenues are within the WIOA Adult and Dislocated Worker funds. The originally allocated amounts were presented, but the Workforce Board recently approved a funds transfer of \$560,000 between those two funds. These adjusted amounts anticipates the approval of that transfer.

In other WIOA-related funds, we've reduced Youth revenues by almost \$193,000 to reflect the removal of carryover. We still have the same allocation of funds, but some will be available to be carried over into the next fiscal year. The \$7,636 difference in JD NEG funds just represents an adjustment in the amount carried in to the current year.

As for the Rapid Response funds, we had originally projected a limited involvement in that program since OED was going to be administering that program. It took a little longer to implement that we had originally thought, so we incurred some additional expenses there (for which we've been reimbursed).

Also, after this year had begun, we were also notified of an additional \$15,000 that was available for WIOA transition and training purposes.

### **Other Income**

After the current year had begun, we were also able to implement three additional contracts: Applegate Trails Association (\$30,000) and Siskiyou Uplands Trails Association (\$35,000), both of which provide trail building and maintenance experience for our clients; and from DHS and CCWD, “Summer Jobs for Foster Youth”, aka Independent Living, (\$20,104).

A rather large negative adjustment of \$191,588 is being shown for the SOHOPE program, a contract we have with Rogue Community College to provide assistance to customers wanting to pursue healthcare occupations. This was a pilot program that, by its nature, has been tweaked along the way, and the scope of RWP’s and ResCare’s involvement in this program has decreased, resulting in a decrease in revenues and accompanying expenses.

There were several funds (Back to Work Oregon, National Fish and Wildlife, REACH, Rethinking Job Search, and Sector Strategies) that were in their second year of a two-year contract, and the amount of carry-in from the previous year varied from what we had originally anticipated. Again, the original allocation hasn’t changed, but just the year in which the revenue is being recognized.

We’ve added \$2,539 for Miscellaneous Income, mainly due to some business collaboration sponsorships in some ventures; and Rental Income has decreased by over \$20,000 due to our actual reimbursable expenses being less than originally projected.

### **EXPENDITURES**

The decreases in Personnel and Operating Expenses are minimal. Contracted services show a decrease of almost \$90,000 mainly due to the reduction in various funding streams as noted above, and the corresponding reduction in the final ResCare contract amount. And, of course, the largest expenditure decrease of over \$226,000 is due to the elimination of carryover in the budget.

### **SUMMARY**

RWP Staff would request that the Corporate Board approve the proposed budget adjustment of (\$330,094). Staff will be happy to answer any questions you may have.

**ROGUE WORKFORCE PARTNERSHIP  
BUDGET FOR YEAR ENDING JUNE 30, 2017**

	AS APPROVED JULY 2016	PROPOSED ADJUSTMENT SPRING 2017	AMENDED BUDGET 2016-17
<b>REVENUES</b>			
<b>WORKFORCE INNOVATION &amp; OPPORTUNITY ACT</b>			
Title 1B Adult	1,169,696	(607,851)	561,845
Title 1B Dislocated Worker	888,966	303,560	1,192,526
Title 1B Youth	1,440,028	(192,887)	1,247,141
Job-Driven National Emergency Grant	220,492	(7,636)	212,856
Rapid Response	14,000	10,690	24,690
Layoff Aversion	45,287	0	45,287
Transition Grant	0	15,000	15,000
<b>WIOA SUBTOTAL</b>	<b>3,778,469</b>	<b>(479,124)</b>	<b>3,299,345</b>
<b>OTHER INCOME</b>			
Applegate Trails Association	0	30,000	30,000
Back to Work Oregon	300,087	137,724	437,811
Careers in Gear	16,384	1,666	18,050
Independent Living	0	20,104	20,104
Local Board Support	131,505	(1,857)	129,648
National Fish & Wildlife Foundation	19,998	20,645	40,643
REACH	333,242	83,742	416,984
Rethinking Job Search	51,604	9,619	61,223
Sector Strategies	126,359	20,060	146,419
Siskiyou Uplands Trails Association	0	35,000	35,000
SOESD (CC4A)	50,408	1,631	52,039
SOHOPE	297,837	(191,588)	106,249
Miscellaneous Income	0	2,539	2,539
Rental Income / Cost Reimbursements	355,557	(20,255)	335,302
<b>OTHER INCOME SUBTOTAL</b>	<b>1,682,981</b>	<b>149,030</b>	<b>1,832,011</b>
<b>TOTAL REVENUES</b>	<b>5,461,450</b>	<b>(330,094)</b>	<b>5,131,356</b>
<b>EXPENDITURES</b>			
<b>SERVICES</b>			
Personnel	833,012	(4,631)	828,381
Contracted Services	3,632,860	(89,874)	3,542,986
RWP Operating Expense	294,282	(3,372)	290,911
One Stop Operating Expense	474,514	(5,436)	469,078
Holdback / Carryover into following year	226,780	(226,780)	0
<b>TOTAL EXPENDITURES</b>	<b>5,461,450</b>	<b>(330,094)</b>	<b>5,131,356</b>



## **INFORMATION BRIEF**

DATE: June 15, 2017

TO: Rogue Workforce Partnership – Workforce Development Board

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: FY 17-18 Budget Process

We are currently working on the budget for the 2017-2018 fiscal year, a process particularly full of challenges this year. In late May, we finally received our WIOA allocation (which we normally would receive around the first of April). The State has informed us that our overall WIOA revenue has been decreased by about 7% (about \$211,000). We don't have word yet about our State General Fund monies, but we're expecting an even larger decrease there. We won't know what those funds look like until the State Legislators approve their budget.

We also have some additional challenges this year due to the new WIOA-required Cost Sharing Agreements through our MOU process with our partners. This will require further breakdown of our cost allocation methodology in order to assign appropriate costs to the appropriate partners. The end result will be very beneficial for all, but will require some extra work on our part.

We anticipate presenting the annual budget to the Corporate Board for their approval at their July 20, 2018 meeting, and for affirmation by the Workforce Development Board at its September meeting.



## **INFORMATION BRIEF**

DATE: June 15, 2017

TO: Rogue Workforce Partnership – Workforce Development Board

FROM: Jim Fong, Executive Director

SUBJECT: WIOA Memorandum of Understanding  
WIOA One-Stop Operator Competitive Procurement

## **BACKGROUND & UPDATE**

The Workforce Innovation and Opportunity Act requires that:

- The RWP develop and enter into a Memorandum of Understanding (MOU) with all required partner workforce organizations.
- That the services and activities under each of those programs must be made available through the WorkSource Rogue Valley Centers.
- Requires each core partner to use a portion of available funding to maintain the one-stop delivery system, including infrastructure costs, career services costs and other shared costs.

WIOA also requires that:

- RWP select or designate a One-Stop Operator through a competitive process at least once every 4 years, or we may choose to implement, a competitive selection process more than once every 4 years.

The deadline for finalizing both the MOU and the One-Stop Operator selection are June 30, 2017. RWP and partner organization leaders are actively working to finalize both.

To keep RWP members updated on this work-in-progress, the current draft version of the MOU, as well as the Request for Proposal for the One-Stop Operator can be viewed at <http://www.rogueworkforce.org>.

We will bring this finalized work for review and approval / affirmation of the Corporate Directors and then the Workforce Board at their first available meetings in the coming fiscal / program year.

Please contact me with any questions.



## Feedback - As a Workforce Development Board

To start the thinking process, here are the questions we're going to explore during the feedback portion of the break out session.

If you have thoughts please write them down and bring them to meeting.

The breakout session will be facilitated by a member of the RWP Corporate Directors

### Key questions:

❖ **What are we doing well?**

❖ **What do we want to stop doing?**

❖ **What do we want to start doing?**

### **Examples of things to consider:**

- Frequency of meetings?
- Length of meeting?
- Format of meeting?
- Subject matter?
- Having 1 Theme/meeting?
- Standardized agenda?
- Are you getting the info you feel is important?
- What things do we do during the meeting that you find helpful or not?
- What else do you need to own, engage in & guide the work?

Other ideas \_\_\_\_\_



Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
<p><b>Goal 1. Continue Building Our Industry Sector Strategy Partnerships</b></p> <p><b>Potential Strategies</b></p> <ul style="list-style-type: none"> <li>○ Create a sustainable framework for locally-driven sector partnerships to understand, anticipate, &amp; respond to the needs of business and industry.</li> <li>○ Foster positive perceptions in business and industry about a coordinated K-20 education and workforce system.</li> <li>○ Engage and interconnect Southern Oregon business leaders, K-20 educators, workforce agencies, economic development, and community partners to collaboratively address the talent pipeline needs of our region's key traded-sector industries: Advanced Manufacturing, Information Technology / E-Commerce, &amp; Healthcare.</li> <li>○ Provide sector industry businesses customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers.</li> <li>○ Develop innovative, partnership-based solutions to address industry workforce needs at the top, middle and entry-levels of their skills pyramid.</li> <li>○ Use data to drive effort and outcomes.</li> <li>○ Work with appropriate partners to sustain and promote the quality of life amenities of the Rogue Valley that make it a highly desirable place to live, locate, and re-locate for employment or business start-up, retention or expansion. Support the Tourism and Hospitality industry as part of a comprehensive strategy to sustain our region as an attractive place to live and do business.</li> </ul>	<ul style="list-style-type: none"> <li>▶ Chairperson of <b><u>Rogue Advanced Manufacturing Partnership (RAMP)</u></b>: Mike Donnelly, Carestream Inc., Co-Chair: Jessica Gomez, Rogue Valley Microdevices</li> <li>▶ Primary objectives for RAMP include: <ul style="list-style-type: none"> <li>○ Building the talent pipeline</li> <li>○ Promoting employability skills</li> <li>○ Highlight manufacturing opportunities</li> </ul> </li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Surveying of businesses to identify top priorities for skills and certifications</li> <li>○ Working with educators and administrators</li> <li>○ Collaborative development of Action Plan for Industry and Educators</li> </ul> <ul style="list-style-type: none"> <li>▶ Business Leaders for <b><u>Rogue Tech Collective</u></b> include Trever Yarrish, Zeal; Scott Alexander, CBT Nuggets; and Terri Coppersmith, PLEXIS Healthcare Systems</li> <li>▶ Primary objectives for Rogue Tech Collective: <ul style="list-style-type: none"> <li>○ Promoting/importing/retaining talent in the region (building the talent pipeline)</li> <li>○ Educational K-20/STEM outreach</li> <li>○ Business-to-Business networking</li> </ul> </li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Development/dissemination of survey</li> <li>○ Business-to-Business networking</li> <li>○ Second annual Rogue Tech Tour for students from SOU, RCC, KCC, OIT</li> </ul> <p>Chair and Co-Chair of <b><u>Healthcare Steering Committee</u></b>: Brent Kell, Valley Immediate Care; Paul Macuga, Asante</p> <p><i>This group just re-convened on June 6, 2017</i></p>	<ul style="list-style-type: none"> <li>▶ Do the goals match what Rogue Workforce Development Board is about? <ul style="list-style-type: none"> <li>○ Is the goal reflective of the Board's charge for our region?</li> </ul> </li> <li>▶ If not, should we eliminate or revise?</li> <li>▶ What are we missing?</li> <li>▶ How do we get more Board engagement &amp; ownership of the work?</li> </ul>

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
<p><b>Goal 2. Continue building a customer-centric workforce system that is easy to access, highly effective, and simple to understand.</b></p> <p><b>Potential Strategies</b></p> <ul style="list-style-type: none"> <li>○ Build the <b>WorkSource Rogue Valley</b> brand by continually innovating product and services to create exceptional customer experiences for both the business and job/career-seeking customers.</li> <li>○ Keep bridging the skills, training and information gaps that currently exist between the needs of business and job/career-seekers and students.</li> <li>○ Enhance our current framework for effective partnering within the workforce system and <b>strengthen partnerships and alignment between workforce service providers.</b></li> <li>○ Align and leverage resources (data, funding, capacity, etc.) to collectively impact common outcomes and reward collaboration.</li> <li>○ Build accountability mechanisms focused on results.</li> <li>○ Build a solution-driven (vs. program-driven) culture.</li> <li>○ Market coordinated system services and unite communications and information sharing among workforce, economic development and education.</li> <li>○ Address the needs of individuals with barriers to employment [WIOA Sec. 108(b)(1)(E)]</li> <li>○ Adopt an equity lens in our investment strategies, policy-making and provision of services to eliminate success disparities in historically under-served populations.</li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>Local Leadership Team (LLT)</b> consisting of RWP, DHS Self-Sufficiency, DHS Voc Rehab, RCC Adult Basic Skills, OED, DHS/RWP Sub-Recipient for Service Delivery (ResCare).</li> </ul> <p><i>Where We're At::</i></p> <ul style="list-style-type: none"> <li>○ Development of MOU in service of seamless customer service delivery and with the goal to coordinate, maximize, and leverage resources.</li> <li>○ Bi-Monthly meetings to coordinate various initiatives, priorities, etc.</li> <li>○ Workforce Academy- a quarterly training open to all LLT staff.</li> </ul> <ul style="list-style-type: none"> <li>▸ <b>WSRV Business Outreach Team</b> meets bi-monthly.</li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Development of shared business briefcase to market products and services for all programs available to support business to recruit, develop, and retain employees.</li> <li>○ Development of real-time feedback mechanisms and shared procedures for business engagement.</li> </ul> <ul style="list-style-type: none"> <li>▸ <b>WSRV Talent Pool workgroup</b> meets monthly.</li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Using consistent framework for validating an individual's skills and qualifications to be "job ready."</li> <li>○ Developing/using tracking codes to find talent registered in iMatchSkills system to match to "job orders" facilitated by local businesses.</li> </ul> <ul style="list-style-type: none"> <li>▸ <b>Rogue Educational Achievement Grant (REACH)</b></li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Our region had the opportunity to</li> </ul>	<ul style="list-style-type: none"> <li>▸ Do the goals match what Rogue Workforce Development Board is about? <ul style="list-style-type: none"> <li>○ Is the goal reflective of the Board's charge for our region?</li> </ul> </li> <li>▸ If not, should we eliminate or revise?</li> <li>▸ What are we missing?</li> <li>▸ How do we get more Board engagement &amp; ownership of the work?</li> </ul>

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
	<p>create a pilot program to serve families receiving Temporary Assistance for Needy Families (TANF). Using human-centered design, this cohort-based model provided 154 participants with the opportunity to access education to start, and in some cases propel their career path.</p> <ul style="list-style-type: none"> <li>○ As this grant ends June 30, leadership and other team members from DHS Self-Sufficiency, WorkSource Rogue Valley, and Rogue Workforce Partnership are in process of planning the transition for participants who are still actively engaged in higher education. This program model is now a part of the JOBS Program contract for program services with WorkSource Rogue Valley (ResCare).</li> </ul> <p><b><u>Data-Driven Decision-Making</u></b>  <i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>▸ Development of Dashboard- are we measuring the right metrics?</li> </ul>	
<p><b><i>Goal 3.</i> Invest in Southern Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.</b></p> <p><b><u>Potential Strategies</u></b></p> <ul style="list-style-type: none"> <li>○ Actively reach out and engage customers, especially target populations, about education, training, employment, and entrepreneurial opportunities.</li> <li>○ Empower Southern Oregonians with the access, knowledge, tools, and resources to launch and accelerate career momentum, including information on local in-demand skills and careers.</li> </ul>	<ul style="list-style-type: none"> <li>▸ <b><u>Local Leadership Team (LLT)</u></b> consisting of RWP, DHS Self-Sufficiency, DHS Voc Rehab, RCC Adult Basic Skills, OED, DHS/RWP Sub-Recipient for Service Delivery (ResCare).</li> </ul> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Development of MOU in service of seamless customer service delivery and with the goal to coordinate, maximize, and leverage resources.</li> <li>○ Bi-Monthly meetings to coordinate various initiatives, priorities, etc.</li> <li>○ Workforce Academy- a quarterly</li> </ul>	<ul style="list-style-type: none"> <li>▸ Do the goals match what Rogue Workforce Development Board is about? <ul style="list-style-type: none"> <li>○ Is the goal reflective of the Board's charge for our region?</li> </ul> </li> <li>▸ If not, should we eliminate or revise?</li> <li>▸ What are we missing?</li> <li>▸ How do we get more Board engagement &amp; ownership of the work?</li> </ul>

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
<ul style="list-style-type: none"> <li>○ Build <b>Foundational Work Skills</b> (<i>basic skills, work ethic, soft skills, etc.</i>).               <ul style="list-style-type: none"> <li>• Continue providing <b>Foundation Skills Training</b> to job/career seekers and expand curriculum offering to students/emerging workers.</li> <li>• Maintain our status as a <b>Certified Work Ready Community</b>, and continue using the <b>National Career Readiness Certificate</b> (NCRC) to validate essential work skills in reading, mathematics and locating information.</li> <li>• Continue to refer appropriate participants to Rogue Community College or Southern Oregon Goodwill Industries for Basic Skills remediation and GED test preparation.</li> <li>• Work with Adult Basic Skills / Title II and other partners to continuously improve, innovate and develop a streamlined, effective, efficient and integrated system for improving adult basic skills and GED completion.</li> </ul> </li> <li>○ Invest in <b>Talent &amp; Skills Development</b> in targeted industry sectors:               <ul style="list-style-type: none"> <li>• <b>Worksite-Based Training</b> – Continue to focus on Back-to-Work Oregon/On-the-Job training, JOBS Plus and Internship / Work Experience opportunities.</li> <li>• <b>Occupational/Vocational Skills Training</b> – invest in existing and new career pathways models with demonstrated returns on investment.</li> <li>• <b>Rethink &amp; Restructure Training &amp; Skills Development</b> - to include innovative and effective work-based learning and apprenticeship models that accelerate training. Create more opportunities and clear, effective articulations for skills and career growth between K-12, post-secondary training / education and work. Seek to establish more accessible “earn and learn” pathways and new “apprenticeship-style” models for middle-skills jobs in targeted industry sectors.</li> </ul> </li> </ul>	<p>training open to all LLT staff.</p> <ul style="list-style-type: none"> <li>▸ <b><u>WSRV Integrated Foundational Skills and Train Oregon Workgroups</u></b>  <i>Where We’re At:</i> <ul style="list-style-type: none"> <li>○ Continued refinement of Foundational Skills Training.</li> <li>○ Launching of “Train Oregon” - an online platform for building skills.</li> </ul> </li> <li>▸ <b><u>Title II Adult Basic Skills Workgroup</u></b>  <i>Where We’re At:</i> <ul style="list-style-type: none"> <li>○ Refinement of customer/student-centric referral tool to increase engagement and GED completion rates.</li> </ul> </li> <li>▸ <b><u>Business/Education Partnership</u></b>  <i>Where We’re At:</i> <ul style="list-style-type: none"> <li>○ Teacher Externships</li> <li>○ Expanding Career Highlights</li> <li>○ Aligning Business/Education partnerships and efforts in the RV.</li> <li>○ Oregon Connections pilot/rollout</li> </ul> </li> <li>▸ <b><u>NCRC</u></b>  <i>Where We’re At:</i> <ul style="list-style-type: none"> <li>○ Many regional school districts are utilizing the NCRC to meet essential skills requirements.</li> <li>○ RWP dashboard reflects data of customers accessing services at WSRV</li> <li>○ 3 local companies have had job positions profiled (so that they can require the NCRC as part of the skills validation process for screening for the right applicant).</li> </ul> </li> </ul>	

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
	<ul style="list-style-type: none"> <li>▸ <b><u>Data-Driven Decision-Making</u></b>  <i>Where We're At</i> <ul style="list-style-type: none"> <li>○ Dashboard- are we measuring the right metrics?</li> </ul> </li> </ul>	
<p><b>Goal 4. Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers.</b></p> <p><b><u>Potential Strategies</u></b></p> <ul style="list-style-type: none"> <li>○ Continue building a seamless talent pipeline with K-12, higher education, post-secondary trainers, WorkSource Rogue Valley and other key community partners. As part of our Sector Strategy approach, connect in-school and out-of-school youth to opportunities in local sector partnerships.</li> <li>• <b>College &amp; Careers for All (CC4A)</b> – A partnership</li> </ul>	<ul style="list-style-type: none"> <li>▸ <b><u>Business/Education Partnership</u></b>  <i>Where We're At:</i> <ul style="list-style-type: none"> <li>○ Teacher Externships</li> <li>○ Expanding Career Highlights</li> <li>○ Aligning Business/Education partnerships and efforts in the RV</li> </ul> </li> <li>▸ <b><u>College and Careers for All</u></b>  <i>Where We're At:</i> <ul style="list-style-type: none"> <li>○ See attached Biennial Report</li> <li>○ Oregon Connections pilot/rollout</li> </ul> </li> <li>▸ <b><u>WSRV In-School and Out-of-School</u></b></li> </ul>	<ul style="list-style-type: none"> <li>▸ Do the goals match what Rogue Workforce Development Board is about? <ul style="list-style-type: none"> <li>○ Is the goal reflective of the Board's charge for our region?</li> </ul> </li> <li>▸ If not, should we eliminate or revise?</li> <li>▸ What are we missing?</li> <li>▸ How do we get more Board engagement &amp; ownership of the work?</li> </ul>

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
<p>focused on transforming K-20 education, with a particularly strong focus on middle 40 students in the state's 40/40/20 goal<sup>1</sup>, and on high-demand middle-skills jobs (<i>more than high-school, less than 4 year degree</i>). CC4A is focused on creating more project-based, hands-on and experiential learning. It integrates <b>STEM</b> (<i>Science, Technology, Engineering, &amp; Mathematics</i>), <b>CTE</b> (<i>Career-Technical Education</i>), <b>Accelerated Learning/Dual-Credit</b> Programs, and <b>CRLE</b> (<i>Career-Related Learning Experiences</i>) to significantly improve academic success (<i>high school graduation, post-secondary training enrollment/completion, etc.</i>) for students and prepare them for career success. CC4A is one of three key pillars in our Southern Oregon Success initiative (<i>others are: Early Learning and Youth Development</i>).</p> <ul style="list-style-type: none"> <li>• <b>Southern Oregon Success</b> - Our region's cradle-to-career, "Collective Impact"<sup>2</sup>, Regional Achievement Collaborative<sup>3</sup> brings together partners from healthcare, social services, early learning, K-12, higher education, community, workforce/economic development and business partners to create academic, life and career success for all children, youth and families. Partners are creating a holistic, seamless, and asset-based<sup>4</sup> system of services/supports to help all youth overcome life obstacles and achieve academic and career success.</li> <li>○ As part of CC4A, RWP will spearhead K-20 Career-Related learning Experience (CRLE) partnerships with key Sector Strategy industries to increase exposure to job and career opportunities, improve work-readiness and awareness of</li> </ul>	<p><b><u>Programs</u></b></p> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○ Forestry crew work-based training</li> <li>○ Career exploration and foundational skills training</li> <li>○ Work experience programs for in-school, and out-of-school youth: youth who are transitioning out of foster care, low-income, homeless, pregnant/parenting, have a criminal background, have a disability, lack basic skills, and are in need of additional assistance.</li> <li>○ Strong partnership (and leadership) from College Dreams who operates in-school program and leverages several funding sources, manages an IDA program, provides financial aid support, and many other programs to get youth's transition into college.</li> </ul> <p>▸ <b><u>Southern Oregon Success</u></b></p> <p><i>Where We're At:</i></p> <ul style="list-style-type: none"> <li>○</li> </ul>	

<sup>1</sup> <http://education.oregon.gov/#what-we-do>

<sup>2</sup> See Stanford Social Innovation Review, Winter 2011: [http://ssir.org/articles/entry/collective\\_impact](http://ssir.org/articles/entry/collective_impact)

<sup>3</sup> See Oregon Chief Education Office: <http://education.oregon.gov/regional-achievement-collaboratives/>

<sup>4</sup> See links on: Trauma Informed Care/Adverse Childhood Experiences - <http://acestoohigh.com/2013/06/21/the-growing-interest-in-aces-and-trauma-informed-practices>; Circle of Courage: <https://www.starr.org/training/youth>; Search Institute Developmental Assets: <http://www.search-institute.org/content/40-developmental-assets-adolescents-ages-12-18> Resilience Education: <http://www.wholechildeducation.org/podcast/is-resilience-the-secret-to-student-success>

Current Strategic Plan Goals & Potential Strategies	Current Efforts Underway	Key Questions- Where Do We Want to Go?
<p>employer expectation, and better connect school-to-work.</p> <ul style="list-style-type: none"> <li>○ Continue to partner, leverage and pursue additional resources for our local youth partnership initiatives.</li> <li>○ Provide catalytic leadership, technical assistance and/or incentives to support adoption and expansion of work-based learning, apprenticeships, internships, career pathway articulations, etc.</li> <li>○ Build strong connections between Out-of-School Youth services, K-12 education and other community partners to ensure customer-centric seamless services and youth success.</li> </ul>		

Dashboard Snapshot										
	Q1: 7/1/16-9/30/16		Q2: 10/1/16-12/31/16		Q3: 1/1/17-3/31/17		Q4: 4/1/17-6/30/17		Cumulative (Unduplicated)	
	#	%	#	%	#	%	#	%		
Business Engagements	22		81		360		TBD			463
Customer Enrollments	2034		2329		2928		TBD			7291
Customers Who Got a Job	2,284		1,793		246*		TBD			
Referral to Hire Ratio	7.23		3.30		3.92		TBD			
Customers Who Accessed Foundational Skills Workshops	742	36%	741	32%	767	26%	TBD			2250
OJT Training Completed	13	72%	20	83%	16	59%	41	77%		90
OJT Sector Strategy/High Wage/High Demand	12	92%	19	95%	14	88%	39	95%		84
OJT Retention 90 Days After Training Period		84%		77%		40%		30%		66%
OST Training Completed	29	88%	39	93%	27	68%	11	85%		106
OST Sector Strategy/High Wage/High Demand	29	100%	39	100%	25	100%	8	100%		101

Average OJT Cost: \$2,511.88

Average OST Cost: \$1,694.18

Definitions	
Business Engagements	Unduplicated per quarter, counts number of unique businesses which received at least one "Business and Employment Promotion" service during a quarter. The count starts over again during the next quarter, if the same business is contacted again in a new quarter, it will count as new contact for that quarter.
Referral to hire ratio (Staff Only)	Numerator: Number of Staff Referrals made (Basic, Enhanced) in a quarter/ Denominator: Number of hires for Basic/Enhanced Listings in a quarter.
Customers Who Accessed FSW %	Numerator: Number of Attendees/ Denominator: Number of Customer Enrollments
OJT Training Completed	Numerator: Number of Individuals Completing OJT/ Denominator: Number Possible Within Reporting Period
OST Training Completed	Numerator: Number of Individuals Completing OJT/ Denominator: Number Possible Within Reporting Period
Customers Who Got a Job*	Wage records for the 3 <sup>rd</sup> quarter are only partially complete. May 20 <sup>th</sup> is the deadline for reporting.



# ROGUE WORKFORCE PARTNERSHIP (RWP) DASHBOARD

[High Level](#)

Goal 1: Continue building our Sector Strategies partnerships	Business Services	Job listings closed (Basic/Enhanced)	QE 9/30/16	QE 12/31/16	QE 3/31/17	QE 6/30/17	YTD Total
			112	98	146	TBD	356
			40%	55%	60%	TBD	52%
			92%	95%	88%	95%	90
			100%	100%	100%	100%	100%
Training Investments (Sector Strategies Industries/In-Demand Sectors)	Percentage of On-the-Job Training Completers	Percentage of Occupational Skills Training Completers					

Goal 2: Continue building a customer-centric workforce system that is easy to access, highly effective, and simple to understand	ROI of job-getting activities	WSRV customers who got a job: (exited during the quarter with wage record)	2,284	1,793	246		4,323
			98%	96%	94%	TBD	96%
			83%	80%	80%	TBD	81%
			22	81	360	TBD	463
			2,358	2,277	2,437	TBD	7,072
Business Services	Number of job listings entered Self-Referral	Number of job listings entered Basic/Enhanced	113	105	188	TBD	406
			72%	83%	59%	77%	90
			88%	93%	68%	85%	106
Training Investments (all)	Percentage of On-the-Job Training Completers	Percentage of Occupational Skills Training Completers					

Goal 3: Invest in Southern Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum	Skill Building Activities	Workshop Occurrences (unduplicated)	579	477	658	377	2091
			376	231	522	TBD	1129
			7.23	3.3	3.92	TBD	4.82
			4.0%	3.3%	3.9%	TBD	3.7%
			77%	78%	84%	TBD	80%
Business Services	Referral to hire ratio (Staff Only)	Percentage of closed listings that result in a hire (Staff and Self)					
Training Investments	Business Satisfaction (Overall Quality of Service % Rated Excellent or Good)	Quality of hire: retention					
Assessments/Certifications	Accelerate Career Momentum: Create opportunity for individuals who are currently underemployed to move up in their career path:	Percentage of On-the-Job Training Completers	13%	11%	19%	46%	24
			53%	48%	20%	83%	27
			84%	77%	40%	30%	58%
			161	175	284	157	777
			34	18	24	16	92
Work-Based Learning	NCRC (unduplicated)	Office Proficiency Assessment Certification (unduplicated)					
College and Careers for all	Career X (started)	Career X (completed)	9	4	4	10	27
			7	0	1	5	13
			78%	0%	25%	50%	48%
			68%	100%	50%	83%	70
			19	22	13	11	65
Goal 4: Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers	Number of QJT Completers	Youth Crew Completers	0	1	3	1	5
			5	7	1	5	18
College and Careers for all	Industry Tours	Internships					
College and Careers for all	Career Days (e.g., Careers in Gear, GP Career Fairs, RCC STEM Connections, etc.)	See CC4A Biennial Report					

# CC4A

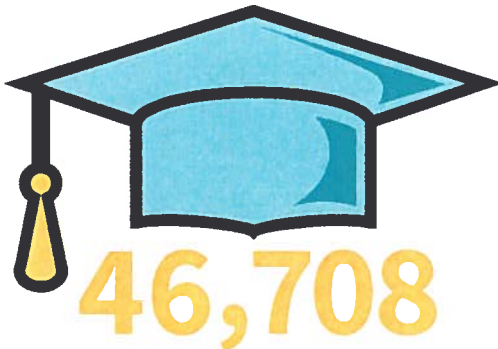
COLLEGE & CAREER FOR ALL

## Biennial Report

Jackson/Josephine



SOUTHERN OREGON ESD  
The Regional Advantage



46,708

COLLEGE CREDITS GRANTED  
to high school students

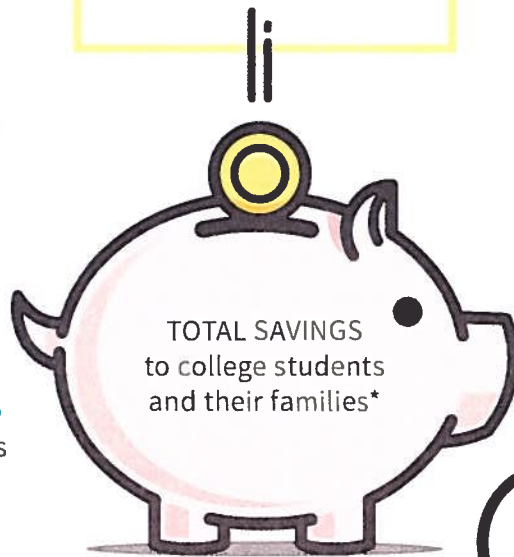
6,600

STUDENTS REACHED with 18  
local career & college activities

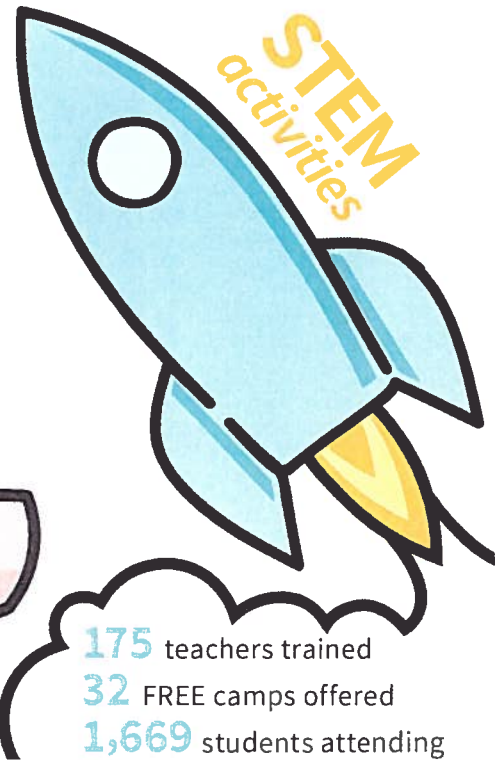
- PLUS -

58 SCHOOL STAFF TRAINED  
on building college culture

\$4.85  
MILLION



TOTAL SAVINGS  
to college students  
and their families\*



STEM  
activities

175 teachers trained  
32 FREE camps offered  
1,669 students attending

### SOUTHERN OREGON UNIVERSITY

Increase over 2 year period (2016-17 vs. 2014-15)



DUPLICATED STUDENT  
HEAD COUNT  
(3,414 vs. 2,813)

+21%



PARTICIPATING TEACHERS  
(123 vs. 108)

+14%



CREDIT HOURS GRANTED  
(12,672 vs. 10,966)

+16%



TOTAL TUITION SAVINGS\*  
(\$1,397,088 vs. \$1,209,001)

+16%

### ROGUE COMMUNITY COLLEGE

Increase over 2 year period (2016-17 vs. 2014-15)



DUPLICATED STUDENT  
HEAD COUNT  
(3,731 vs. 3,046)

+22%



PARTICIPATING TEACHERS  
(139 vs. 93)

+49%



CREDIT HOURS GRANTED  
(11,894 vs. 10,419)

+15%



TOTAL TUITION SAVINGS\*  
(\$1,177,506 vs. \$964,782)

+34%

\* Savings rates calculated with standard tuition rates minus dual credit cost (if any). Savings does not include fees, so actual savings to students may be higher.

Data gathered from the 2015-16 and 2016-17 school years. For more information, contact Daniella Bivens at 541-776-8590.  
College and Career 4 All (CC4A) is a collaboration network under Southern Oregon Success (SORS).

## Community Dashboard

### Detailed Metrics View

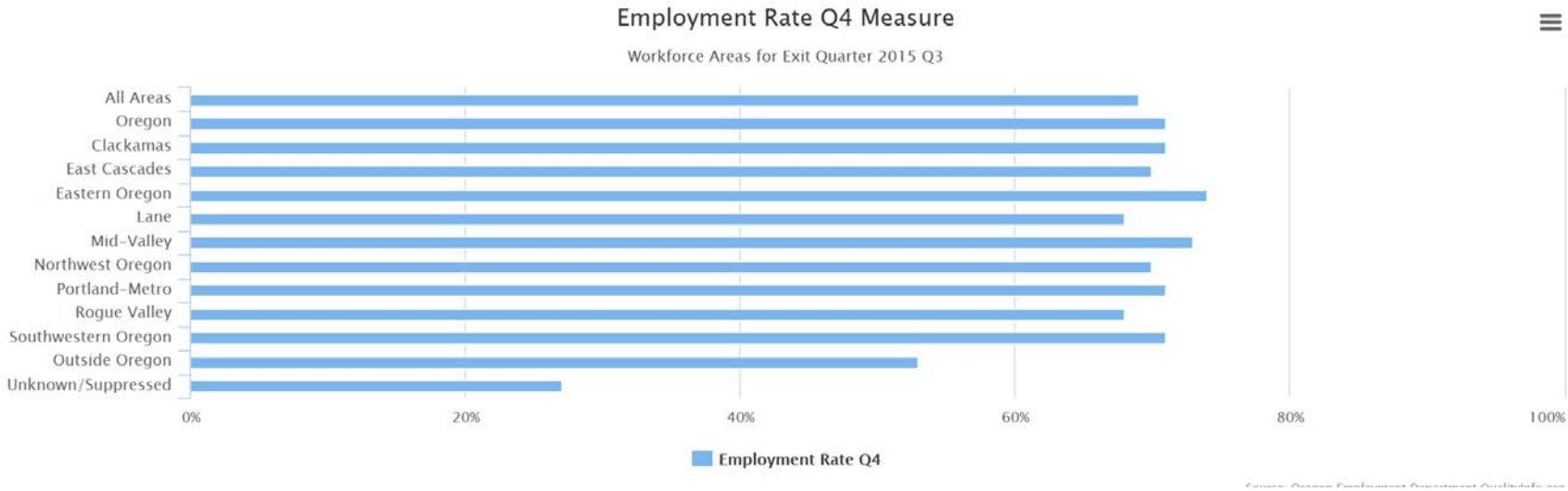
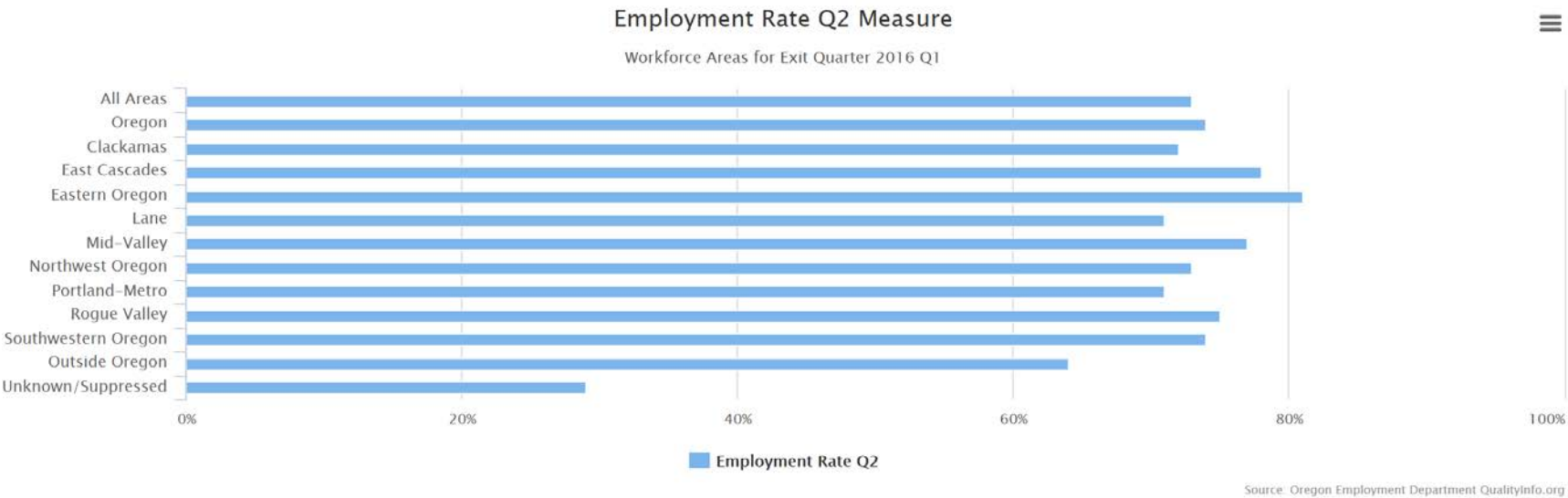
preconception health Children are born to women who have had appropriate preconception care.	early learning Children are entering kindergarten ready to learn.	youth academic success Students are graduating from high school.	college and careers for all Youth are graduating from high school, and are ready for college/work.
<ul style="list-style-type: none"> <li>• Increase the use of LARCS (Long Acting Reversible Contraceptives) among women at risk of unintended pregnancy.</li> <li>• Improve preconception health. <ul style="list-style-type: none"> <li>◦ Increase use of folic acid.</li> <li>◦ Decrease smoking rates.</li> <li>◦ Decrease drug/alcohol usage during pregnancy.</li> </ul> </li> <li>• Increase the number of women of child bearing age who are screened with the 5 P's (Parent, Partner, Past, Present, Pregnancy) – a form of SBIRT (Screening, Brief Intervention, Referral to Treatment).</li> </ul>	<ul style="list-style-type: none"> <li>• Increase the number of children who make regular visits to a primary doctor.</li> <li>• Improve by 10% the Kindergarten Assessment scores.</li> <li>• Increase the percentage of children enrolled in quality early childhood programs.</li> <li>• Increase the number of children served by DHS who receive early learning and parental support services.</li> </ul> <p><i>16,055 children in Jackson/Josephine counties are served by DHS.</i></p>	<ul style="list-style-type: none"> <li>• Improve 3rd grade reading - baseline 69.1%* at grade level.</li> <li>• Improve 8th grade math - baseline 57.8 % at grade level.</li> <li>• Increase 9th grade student attendance - baseline 78.2%* not chronically absent.</li> <li>• Increase the number of 9th grade students who have an adequate number of credits at the end of 9th grade.</li> <li>• Increase the graduation rate - baseline 67.4%*.</li> </ul> <p><i>*=All students 2013-2014, currently includes Klamath Co.</i></p>	<ul style="list-style-type: none"> <li>• Increase the number of college level courses in high school: goal is 3+.</li> <li>• Increase National Career Readiness Certificates earned - baseline is 613.</li> <li>• Increase 1st year post-secondary enrollment - baseline is 53%*.</li> <li>• Increase 2nd year post-secondary persistence - baseline 41%* (approximately).</li> </ul> <p><i>*= (2008-2009 cohort of 9th graders, data currently includes Klamath Co.)</i></p>

### Children, Youth & Families are Healthy

YOUTH HEALTH	ACCESS TO HEALTH CARE
<ul style="list-style-type: none"> <li>● Youth Drug &amp; Alcohol Rates (11th grade binge drinking and marijuana usage in last 30 days. 25% in both counties)*</li> <li>● Teen Pregnancy Rate (Jackson County: 37 births per 1000 teens, Josephine County is 36 births per 1000)*</li> <li>● Teen Suicide Rate (8% of youth in both counties attempt suicide.)*      *=Community Health Assessment 2013</li> </ul>	<ul style="list-style-type: none"> <li>● Patient Center Primary Care Home (in 2013, 41-95% of patients assigned to a PCPCH. Goal is 100%.)</li> <li>● Access to oral health care (% of untreated decay in children grades 1-3 in the region is 24%.)*</li> <li>● Adolescent well care exams (as of 2013, 20-23% of youth 12-21 received annual exams. Goal is 53%.)</li> </ul>

**Children First Ranking** Jackson County ranks 33 out of 36 counties for number of homeless youth. Josephine ranks 27 out of 36 (with 36th being the highest number of homeless youth). 26.7% of the children in Jackson County live in poverty and 30.7% in Josephine County.

Workforce Innovation and Opportunity Act Common Core Measures-  
Lagging Indicators



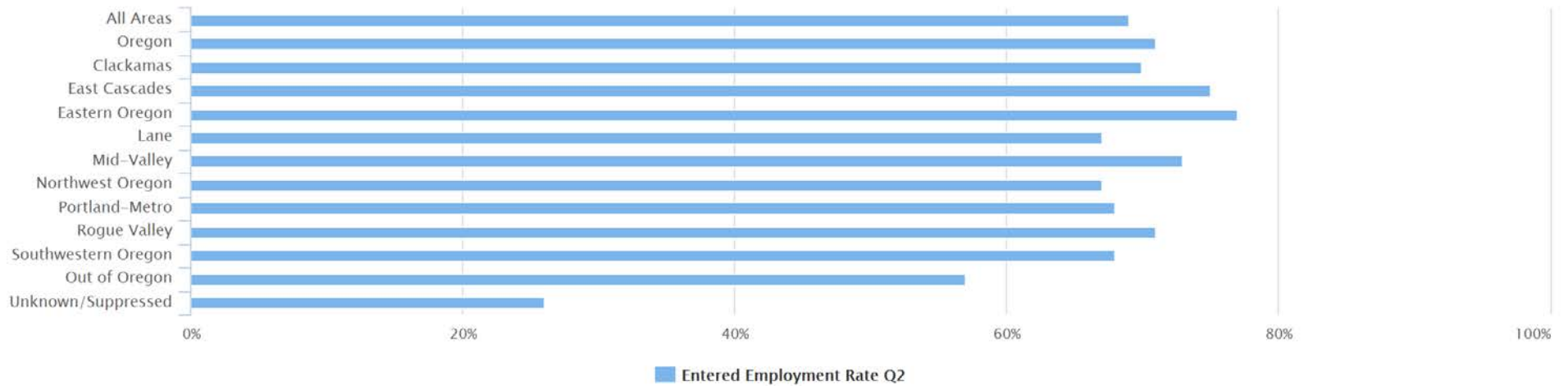
## Median Earnings Q2 Measure

Workforce Areas for Exit Quarter 2016 Q1  
(Quarterly Median Earnings)



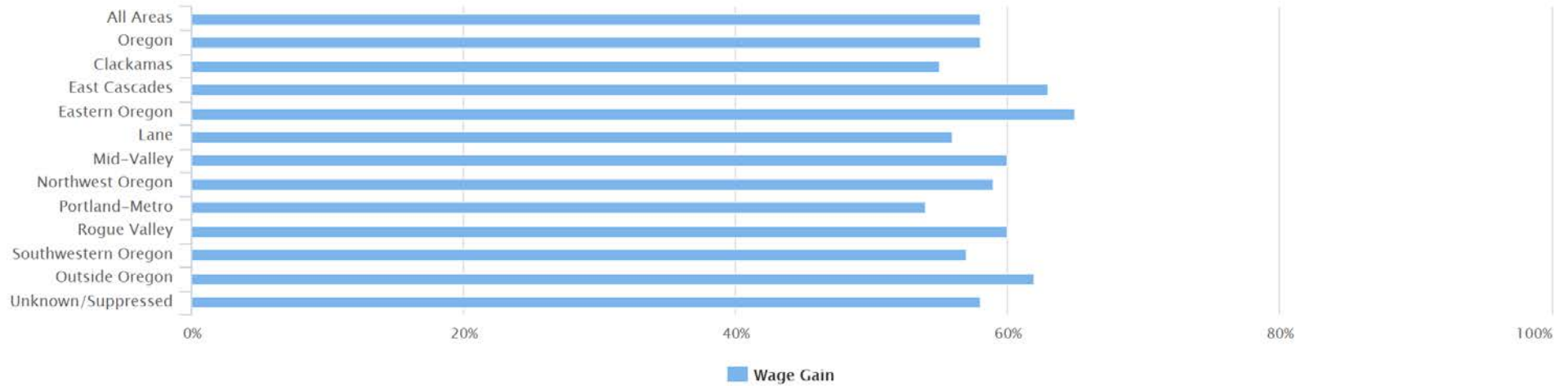
## Entered Employment Rate Q2 Measure

Workforce Areas for Exit Quarter 2016 Q1

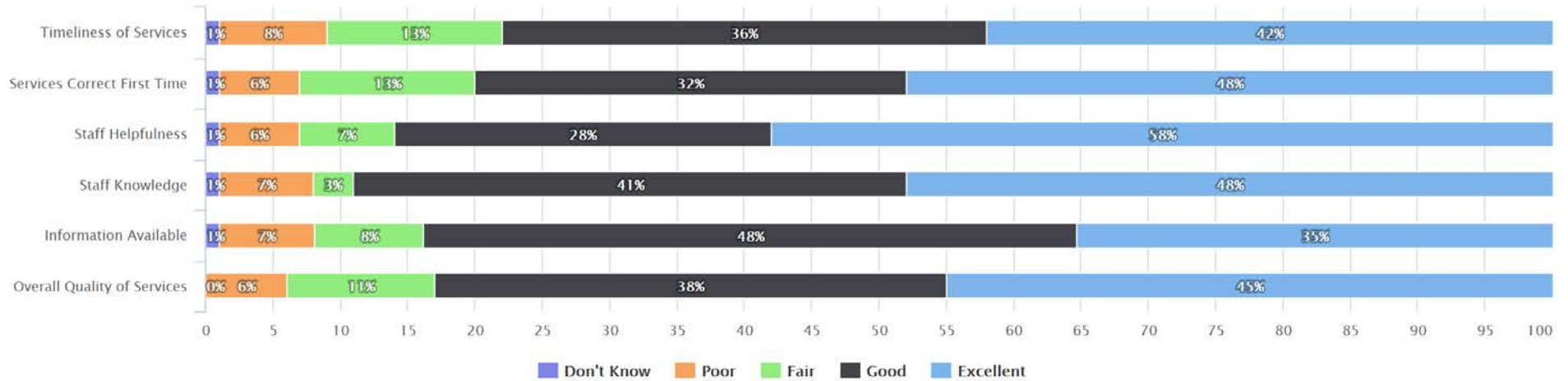


## Wage Gain Measure

Workforce Areas for Exit Quarter 2015 Q4



## Individual Customer Satisfaction – Key Performance Measures for Survey Date Apr-2017



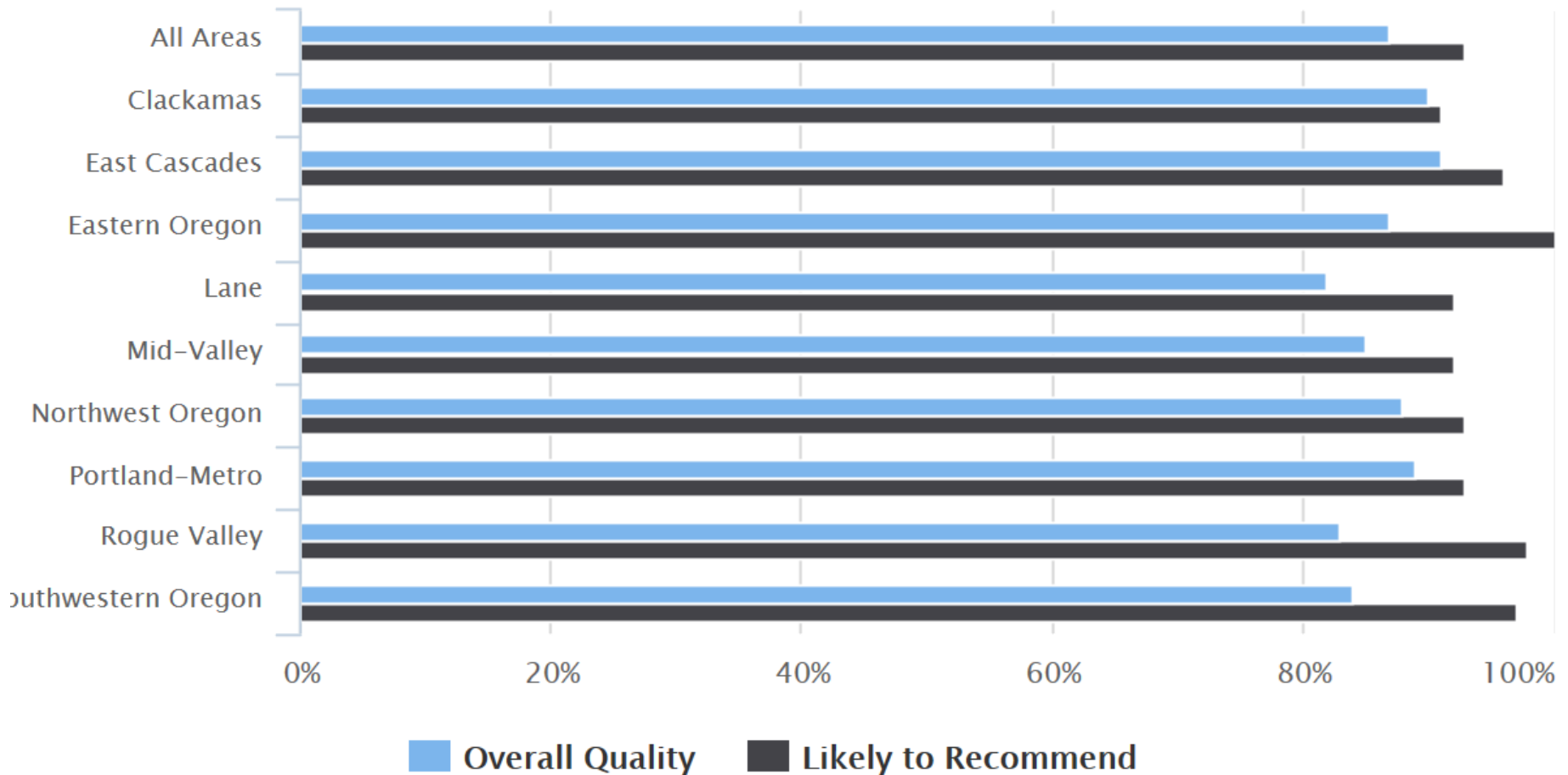
Source: Oregon Employment Department Quarterly Satisfaction Survey



# Individual Customer Satisfaction by Workforce Area for Apr. 2017



Percentage of Excellent or Good Responses



Source: Oregon Employment Department QualityInfo.org