








## Agenda

### **Rogue Workforce Partnership - Workforce Board Meeting**

Thursday September 14, 2017 • 2:00-5:00 p.m. | Pacific Retirement Services -1 W. Main Street,  
Third Floor Washington Room, Medford, OR

Video/Phone Conference access available: <https://global.gotomeeting.com/join.661685405>. Select your audio preference:  
1) Use telephone: 1+ (312)-757-3121; Access Code: 661-685-405; (normal long distance charges will apply); 2) Or, use computer  
microphone & speakers (headset is recommended to avoid reverb)

<u>Time</u>	<u>Item</u>	<u>Action</u>	<u>Reporting</u>
2:00 p.m.	<b>Call to Order (10m)</b> <ul style="list-style-type: none"> <li>Welcome &amp; Introductions</li> </ul>		Jessica Gomez
	<b>Consent Agenda (1-2m) -</b> <ul style="list-style-type: none"> <li>April 27, 2017 - RWP Workforce Board Meeting Minutes </li> <li>June 15, 2017 - RWP Workforce Board Meeting Minutes </li> </ul>	<b>Action</b>	Jessica
<b><u>NEW BUSINESS</u></b>			
2:10 p.m.	<b>College and Career for All - Regional Career Related Learning Experience Model (10m)</b> <ul style="list-style-type: none"> <li>Historical background for business engagement</li> <li>Proposed CRLE Pyramid model for aligning, supporting and coordinating work with business, education and other partners </li> </ul> <b>Small group breakout sessions</b> <i>Each table will have a facilitator, scribe, and person to report out to the larger group.</i> <ul style="list-style-type: none"> <li>Questions to explore (20m) <ul style="list-style-type: none"> <li>What are the current activities that your school district, business, or organization are involved in that support the categories in the pyramid</li> <li>Does this model resonate?</li> </ul> </li> <li>Small group report out (25m)</li> <li>Larger Group Discussion and Questions (20m)</li> </ul>	Discussion & Recommendations	John Underwood, Dana Shumate  RWP Workforce Development Board Members / Key leaders from Business, Education, and other partners
3:25 p.m.	<b>Careers In Gear Update (5m)</b> <ul style="list-style-type: none"> <li>New Date</li> <li>Tight/loose Model</li> </ul>	Inform	Stacie Grier & Jen Perry
3:30 p.m.	<b>Break (10m)</b> <ul style="list-style-type: none"> <li>Networking &amp; Light Snacks</li> </ul>		All

<u>Time</u>	<u>Item</u>	<u>Action</u>	<u>Reporting</u>
<b><u>OLD BUSINESS</u></b>			
3:40 p.m.	<b>Strategic Planning Retreat (5m)</b> <ul style="list-style-type: none"> <li>December meeting cancelled</li> <li>Doodle Poll sent out for weigh-in on best date in January</li> </ul>	<i>Inform</i>	Jessica, Aurora King
3:45 p.m.	<b>Policy Discussion &amp; Approval (25m)</b>  <ul style="list-style-type: none"> <li><b>Adult/Dislocated Worker Documentation and Eligibility</b></li> <li><b>Youth Eligibility &amp; Enrollment</b></li> <li><b>Sub-Recipient Monitoring</b></li> </ul>	<b><u>Action</u></b>	Jessica, Aurora, Sherri Emitte
4:10 p.m.	<b>RWP PY 16 Budget Revision Affirmation</b>  <b>RWP PY 17 Budget Affirmation (15-20m)</b> 	<b><u>Action</u></b>	Jessica, Sherri
4:35 p.m.	<b>WIOA Implementation (15-20m)</b>  <ul style="list-style-type: none"> <li><b>One-Stop Operator - Selection Affirmation</b></li> <li>Memorandum of Understanding</li> <li>Cost Sharing / Infrastructure Agreement</li> </ul>	<b><u>Action</u></b> <i>Inform</i> <i>Inform</i>	Jessica, Jim Fong, Sherri
4:50 p.m.	<b>RWP Dashboard from PY 16 (10m)</b>  <i>(screencast link was sent out prior to meeting)</i> <a href="https://screencast-o-matic.com/watch/cbQjcjIQNS">https://screencast-o-matic.com/watch/cbQjcjIQNS</a> <ul style="list-style-type: none"> <li>Highlights &amp; Questions</li> </ul>	<i>Inform &amp; Discuss</i>	Aurora
	<b>Other Business</b>		Jessica
5:00 p.m.	<b>Adjourn</b>		Jessica

 = 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 842-2518.

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

100 E. Main St., Suite A. | Medford, OR 97501-6125 | (541) 842-2500



## 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:

---

Chair

---

Date





## **ROGUE WORKFORCE PARTNERSHIP**

### MINUTES

#### **ROGUE WORKFORCE PARTNERSHIP**

June 15, 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, Shawn Hogan, Nikki Jones, Joe Myers, Colleen Padilla, Brian Shumate (*arrived for Strategic Plan discussion*), Sherri Stratton, John Underwood, Drew Waites, Trever Yarrish

#### QUORUM PRESENT: No

#### OTHERS ATTENDING:

*Jackson County Commissioner:* Rick Dyer

*Business Oregon:* Marta Tarantsey

*WorkSource Rogue Valley:* Andrea Anderson, Sara Beck, Andrea Burcham; Tabitha Carlson, Linda Lochard, Joe Miller, JoshMorell, Roxanne Hurst, Tamara Schroeder

*Oregon Employment Department - Workforce & Economic Research:* Guy Tauer, Ainoura Oussenbec

*Junior Achievement:* Deanna Wilson

*College Dreams:* Kurt Hildebrand, Jen Perry

*Rogue Workforce Partnership:* Tami Allison, Sherri Emitte, Jim Fong, Julie Gillis, Aurora King, Dana Shumate

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

The RWP-Workforce Board meeting was called to order by Chair Jessica Gomez at 2:09 p.m. A round of introductions were made.

Jessica gave an overview of today's meeting indicating that the focus will be strategic goal planning.

#### **2) CONSENT AGENDA**

Approval of the April 27, 2017 RWP-Workforce Board meeting minutes was deferred to the next Workforce Board meeting due to the lack of a quorum. The OJT Policy update will be brought to the next RWP-Corporate Directors for action.

### 3) FOLLOW-UP DISCUSSION FROM APRIL 27 WORKFORCE BOARD MEETING

#### **Bylaws & Review/Revision & Clarifying Relationship between Corporate Directors and Workforce Board**

Jim referred the group to the RWP Bylaws Review document in the packet. This document addresses all of the questions or issues that were raised in the previous meeting. This document was reviewed by the RWP - Corporate Directors and the following decisions were made by them:

- Bylaws will be revised as appropriate
- Any new member additions made to the Workforce Board and the Corporate Directors during the course of the year will be noted on future agendas.
- Membership terms will be listed on the board contact list.
- Emails for Workforce Board members will not be added to the Rogue Workforce Partnership's website.
- The budget will be developed and presented for approval to the designated County Commissioners (*aka: Rogue Valley Workforce Consortium, and WIOA "Chief Elected Official"*) and the Corporate Directors, and then also brought to the Workforce Board for their affirmational approval.

A question was posed regarding: "Is there overlap between the Workforce Board and the Corporate Directors?" The Corporate Directors are comprised of 7 to 9 Business/Industry Leaders from the Workforce Board, plus the two designated County Commissioners. The Corporate Directors function as the "Executive Committee" for the Workforce Board. In cases in which timely action is needed between quarterly Workforce Board meetings, or where there is not a quorum at a Workforce Board meeting, the Corporate Directors are authorized to take action. These decisions are then brought to the Workforce Board for an affirmational vote, as needed. The Corporate Directors also guide the overall agenda-setting and preparatory work for the Workforce Board meetings.

A concern was raised regarding not all past meeting minutes being available on the RWP website to ensure that the public is apprised. Jim indicated that this is a "catch-up" item that fell to a lower priority due to other more time-sensitive priorities related to WIOA Implementation and compliance; however this will be brought up-to-date in the very near future.

In answer to another inquiry, Jim noted that the RWP's fiscal year follows the state fiscal year (July to June) and not the federal fiscal year (October to September).

In response to another question, Jim noted that our RWP legal counsel was not asked to specifically review the last by-laws revision, as this was a very minor change, and was discussed previously with counsel. Extensive legal review had been done in 2015 with the re-configuration of the entire governance structure to comply with WIOA.

Jim also shared that the charge of the Workforce Board is not just managing one small sliver of the workforce system, but to work with all the partners who are a part of the system - even though this board doesn't have direct operational or budgetary oversight of all these organizations. The RWP is responsible to ensure that the system gets aligned to meet the needs all job and career-seekers, and our region's businesses.

#### 4) BUDGET

**PY 16-17 Budget Revision Affirmation** - No action taken due to the lack of quorum. Sherri Emitte, Chief Finance and Administrative Officer, reviewed the budget adjustment with the board. This item will be brought back to the next Workforce Board meeting for their affirmation.

**PY 17-18 Budget Process** – Sherri reviewed the PY 17-18 Budget Process with the board indicating that we received the region's federal WIOA allocation in late May which decreased by 7%, or about \$211,000. We don't yet have word about the region's State General Fund workforce allocation, but are expecting an even larger decrease in that funding. Additional challenges will also be faced this year as we enter into the new WIOA-required Cost Sharing/ Infrastructure Funding Agreements through our MOU process with our partners which will require further breakdown of our cost allocation methodology in order to assign appropriate costs to the appropriate partners. Sherri concluded by saying that we anticipate presenting the annual budget to the Corporate Directors for their approval at their July 20, 2018 meeting, and for affirmation by the Workforce Development Board at the September meeting.

#### 5) MEMORANDUM OF UNDERSTANDING, COST SHARING & ONE-STOP OPERATOR PROCUREMENT

Jim updated the board indicating that a draft of the MOU is posted on the website and that staff are in the midst of working with WIOA required partners on the Cost Sharing/Infrastructure Funding Agreement. These items will be brought to the Corporate Directors in July and to the Workforce Board in September for review.

A Request for Proposal for the One-Stop Operator has also been sent out and publicized. This procurement is a required compliance item under WIOA. RFP responses are due by noon on June 20, 2017. Jim indicated that the Corporate Directors have authorized and directed the RWP staff to conduct the review and selection process for the One-Stop Operator. All RWP members are welcome to participate in this selection process if they choose to. Please let Jim know if you are interested.

#### 6) SMALL GROUP DISCUSSION - STRATEGIC PLAN FIESTA

Aurora walked through the Current Strategic Plan Goals & Potential Strategies handout as well as the Dashboard Snapshot, RWP Dashboard, and Lagging Indicators documents.

Jessica spoke about today's small group discussion process and shared that the audience members are welcome to stay but wouldn't be directly participating in the strategic planning work with the Workforce Board, and were asked to keep any side conversations at a minimum during this time.

Aurora and Jessica encouraged everyone to be very candid, as well as creative with their feedback.

Please see separate document entitled Combined Feedback Information for the results of the small group discussions.

## **7) OTHER BUSINESS**

No other business was brought before the Rogue Workforce Partnership Workforce Development Board.

## **8) ADJOURN**

The meeting was informally adjourned by Chair Jessica Gomez at 5:05 pm.

Respectfully Submitted,

Tami Allison  
Senior Project Manager  
/tka

APPROVED:

---

Chair

---

Date

Rogue Workforce Partnership  
SMALL GROUP DISCUSSION - STRATEGIC PLAN FIESTA  
June 15, 2017

**What are we doing well?**

- Good questions asked – attentive to process and participating
- Helps us to understand what we're doing well.
- Moving toward more tools, dashboard, indicators, recruiting members, interested public.
- Organization is keeping abreast and current on all the information coming from the State, Fed's, etc.
- Lots of compilation work, packets are full of good information
- Only three additional members to board
- Set aside time at corporate Directors to hone agenda
- Flexibility that's happening at board level to flow and flex with the ongoing challenges underway with WIOA implementation, funding changes, policy changes
- Best meeting in past year when employers lead the presentation on sectors
- Staff prep info out timely
- Like dashboard
- WSRV staff hearing what business' need
- We have the forums
- We're in transition – past involvement under change – scope of work changing, MOU getting done
- Revisiting goal – we're doing what's in current column
- Some good movement to more sector focus at WSRV, RCC – but a slow process
- Integration between local business, State, etc.
- Workforce Board member orientation
- Positive outcomes (even though still confusing, charts/data are helpful)
- Connection between RWP and the educators is getting stronger by the month
- Jim doing a great job of integrating groups
- Quarterly meetings are good
- 9-16 engagement / student connection with career
  - Career fairs/college and...
  - Guest speakers

- SOREDI Tours
- Careers in Gear
- Business Education Partnership
- RAMP
- Tech Tour / Tech Transfer Project KSTP
- High school – getting solid
- Project Lead the Way – 7/8<sup>th</sup> grade
- Engagement with partners – vision, mission
  - Workforce development
  - Business
  - Education
  - Community partners
  - Cross Sec
    - Business & Education
    - Job Placement

## What are we not doing well / want to stop doing?

- 3-hour meetings every 3 months is not effective
- Taking too much time for reporting out (doesn't leave any time for discussion)
- Voting without discussion
- Meetings too long
- Agenda too long
- If just oversight, better ways to spend time – (want to play an active role)
- Improve communication going out
- Too much information
- Encapsulate Corporate Directors and report
- Quarterly meetings not enough
- Is board too big / unwieldy?
- No quorums 2 times in 18 months
- We all don't have a common picture on what we're trying to accomplish
- Don't have great cross-information sharing
- We're not asking the right questions of the employers (e.g. building/filling skills gap, contracting or growing – figure out why – root cause)
- Are training investments being driven by interest or our sector priorities?
- Members challenging the intentions of the workforce board
- Members should not be as critical
- Don't get lost in the minutia
- Spending time in meetings on things that can be addressed in emails
- Vocational pre-apprenticeship programs not utilized as well – not doing programs such as KSTP
- Outreach to drive engagement in work – skills/trades – more attention
- Make school relevant to the 70% not college-bound – continue to ignite passion
- The “Plan” is what matters

## What do we want to start doing?

- More group discussion and decision-making during meetings
- Give more definition and clarification during meetings
- Cut agenda down to a third the size
- Move to every other month meetings and focus on one thing
- Ask for more participation from the board
- Define the role/contribution of members – “what can we contribute?”
- Create and enforce minimum attendance requirements for board members
- Put information reports in packets to read prior to meeting, report out at meeting
- Have continuity in dialogue
- Help members be better ambassadors
- Need 30 second elevator speech
- How are we doing across the state?
- See agenda with discussion points
- How do you have time to discuss in quarterly meetings
- How does board have influence on bad numbers?
- Ask critical questions
- Continuity in Dialogue
- Learn/Action – next meeting learn about action
- Information reports in packet to read, then spend time reporting out at meeting
- Re: negative press (e.g. PERS) – respond to board members in an email
- Given limited resources, what are our priorities?
- Helpful
  - What are the latitudes on the data?
  - Which numbers do we focus on?
  - Which numbers are really connected to what we’re doing?
  - How can we influence activity/data?
  - Movement in data – what happened?
- Annual Event Forum
  - Public comments
  - Messaging out that we exist and how things work



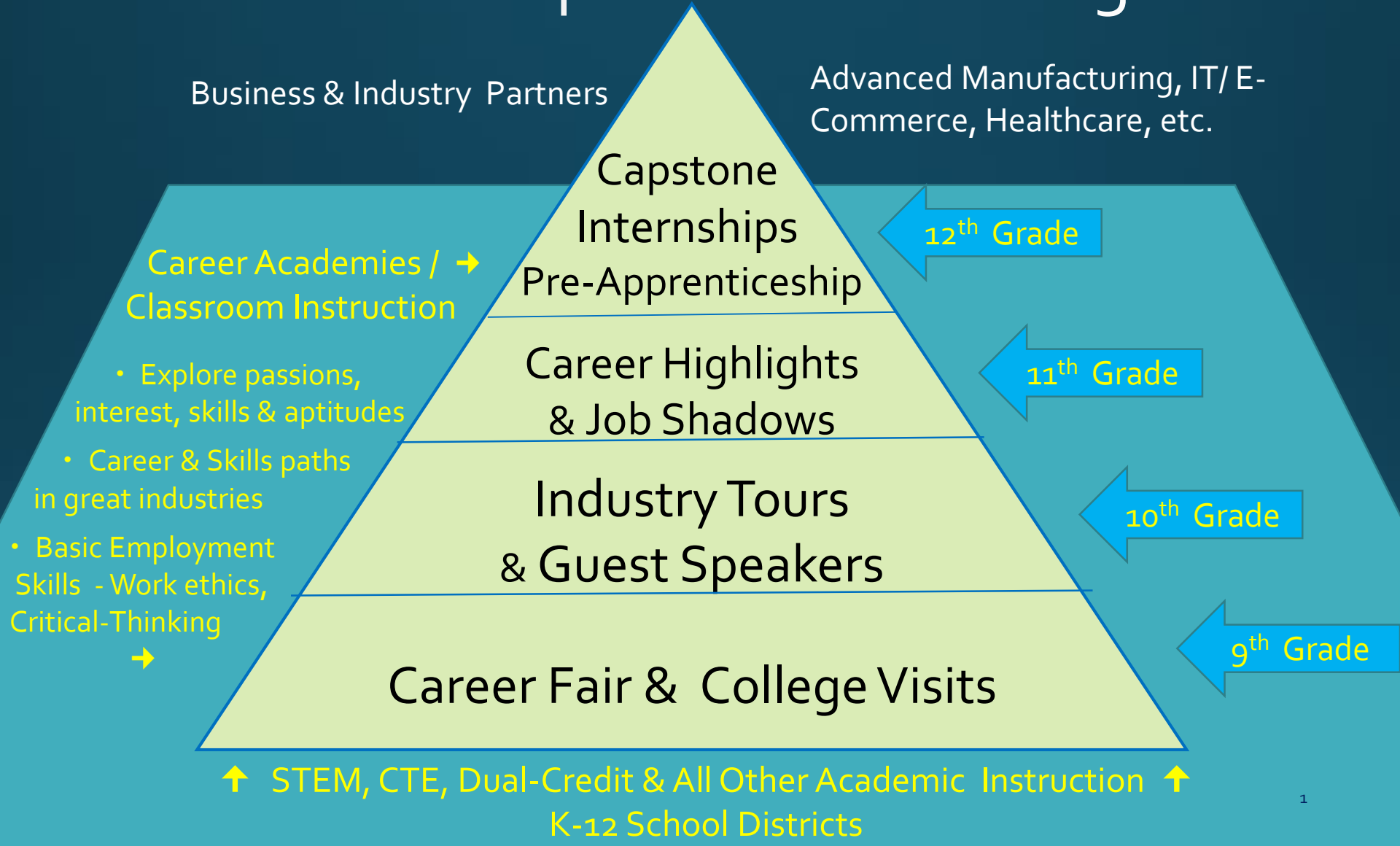
- One meeting – engage the audience (agendize?)
- Piece of paper with all board members and organizations that audience can speak with afterward
- With introductions, include 1-2 sentences about what's going on in their world
- Demystify Corporate Directors Meeting – monthly summary for board
- Move back to every 2 month meetings
- Implement minimum attendance and/or reduce members who don't come
- Refine, streamline, and prep workforce board meeting agenda
- More RWP workforce board member participation and ownership of the agenda, priorities, and presentation
- Board members come prepared to engage, etc.
- Focus more on results data, get more and timely results – like leading indicators (e.g. what we needed on NCRC asked for and results data)
- Need to get to greater clarity on the “real” measure & results we want to see – e.g. pie chart – sectors – time of RWP focus, how much of this is our focus?  
e.g. Sherri, OED –
  - 45% focus on business need
  - 20% WIOA time spent
  - 25% system alignment
  - 15% other
  - 40% workforce listen to employer demand
- Need the aggregated RWP Pie Chart
- WSRV + RWP Partners should outreach to businesses on their needs/demands – to get beyond this group for input
  - › Need to market better
  - › WSRV report to RWP on feedback from their Business Outreach Team
  - › WSRV leaders sit with staff and gather this information to bring to RWP
  - › Ask RWP what do you want to hear from service providers?
    - E.g. Nikki- What's happening with workforce – that I cannot get worker talent into door?
  - › Report out Talent Pool team work – need 30 people – can pull up list
  - › Need training of WSRV staff on how to have those conversations with business
    - What's going on? Root Cause?
    - Get Nikki's list of questions
    - Nikki – “Train the Trainers”

- Talk about how to put people to work
- Be more strategic
- Empower the Corporate Directors to bring important issues to the workforce board
- Obtain better quality remote audio option for board meetings
- Open the door to the pathway between the trades and educators
- Get more of a commitment from K-12 to send folks to apprenticeship opportunities
- Open high school door to CTE awareness as an alternative career path
- Message, “need something beyond a high school diploma.”
- Offer training during non-traditional times for under employed (evenings or weekends)
- Better communication of apprenticeship opportunities
- Better communication between training centers and WSRV
- Outreach other options
- Improve and emphasize work on pre-apprenticeship
- Additional utilization of employers/business
  - Get employers to the table
  - Continue to build relationships and dialogue
  - Increase connections, refined role / refined time for them
- Increase our ability to align what we are doing – then the ability to outreach and communicate our projects (K-20)
- Have board meetings at a school and tour school

#### Ideal Layout

- Bullet point/message points
- Email to a link (one source) on past information (no repeating/duplication)
- Bring reports from various viewpoints – a presentation about one thing
- More frequent meetings – every other month
- Opportunity for feedback
- Corporate Directors meeting flows into workforce board meeting
- More engagement, but not to the point of burnout
- Staff talking through reports – videos (meeting for asking questions)
- 1<sup>st</sup> hour – action items, after videos
- 2<sup>nd</sup> 1.5 hours – focused on specific topic (e.g. Mike/John on RAMP – others contribute from their perspective – Health, RCC, providers, variety)

# CC4A - CRLE, STEM, CTE & Dual-Credit - Experiential Learning Model





# ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

---

DATE: September 7, 2017

TO: Rogue Workforce Partnership

FROM: Aurora King, Chief Operating Officer

SUBJECT: Adult/Dislocated Worker Documentation and Eligibility Policy

## **BACKGROUND**

Per WIOA Regulations, the determination of whether an individual is eligible to receive assistance from Wagner-Peyser, Workforce Innovation and Opportunity Act (WIOA) Adult, or WIOA Dislocated Worker, eligibility must be completed prior to accessing Individualized Career Services and Training Services. Registration in WorkSource Oregon Management Information System (WOMIS) is required for Self-Directed and Basic Career Services.

Eligibility is self-attested at the time of registration and documentation that demonstrates an individual's age, whether they are legal to work, as well as whether they have completed selective service (when applicable) is required to access Individualized Career Services and Training. If priority of service is utilized, there must be backup support documentation in the participant's file that demonstrates their status.

## **SUMMARY**

RWP Staff would request that the Workforce Development Board approve the attached Adult/Dislocated Worker Documentation and Eligibility Policy.



**TITLE: ADULT/DISLOCATED WORKER DOCUMENTATION AND ELIGIBILITY GUIDANCE**

**PURPOSE**

To provide eligibility and documentation guidance for customers seeking Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker services.

**REQUIREMENTS**

Per WIOA Regulations the determination of whether an individual is eligible to receive assistance from Wagner-Peyser, WIOA Adult, or WIOA Dislocated Worker must be completed prior to accessing Individualized Career Services and Training Services. Registration in WorkSource Oregon Management Information System (WOMIS) is required for Self-Directed and Basic Career Services.

**REFERENCES**

WIOA Section 3(2), Section 3(15)

**SCOPE**

This policy applies to Rogue Workforce Partnership's sub-recipient of WIOA Title 1B Adult and Dislocated Worker funds.

**POLICY**

Eligibility elements are collected during the online customer registration in WOMIS. Once the customer has completed filling out all required data fields, eligibility is determined instantaneously based on their self-attested answers that are true at the time of registration. The eligibility level determines the types of service the customer qualifies for. Customer enrollment episodes are only created in I-Trac (the Title 1B electronic data tracking system) if the individual is WorkSource Adult or Dislocated Worker eligible.

See Table on the following page.

Eligibility Level (Funding Stream)	Eligibility Elements	Services	Service Tracking System
<b>Wagner-Peyser</b>	Citizen or Legal to Work Agree to self-attestation disclaimer	Career Center (American Job Center) Usage Job Match Self-Directed Services Basic Career Services	iMatchSkills
<b>Adult</b>	Wagner-Peyser Eligibility Elements Age 18+ Individuals who identify as males are registered for Selective Service (who are born on or after January 1, 1960)	Wagner-Peyser level Services Basic Career Services Individualized Career Services <sup>1</sup> Training Services <sup>2</sup>	I-Trac
<b>Dislocated Worker (DW)<sup>3</sup></b>	Adult Eligibility Elements and One of the following applies: (1)Displaced Homemaker (2)Military Spouse (active duty) (3)Is eligible or has exhausted Unemployment Insurance (4)Has been laid-off within the past four years (5)Has been terminated or laid off, or who has received a notice of lay-off (6)Were self-employed and are now unemployed as a result of general economic conditions in the community in which the individual resides, or because of natural disasters. (7)Has been employed for a duration sufficient to demonstrate, to the appropriate entity at a one-stop center, attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law and is unlikely to return to their previous occupation.		

---

<sup>1</sup> Customers must document eligibility elements before they can receive this level of service. Paper copies should be collected by Talent Development Specialist and the customers' DOB should be validated, along with Selective Service (if applicable) and Legal to Work status.

<sup>2</sup> Customers must document eligibility elements before they can receive this level of service. Paper copies should be collected by Talent Development Specialist and the customers' DOB should be validated, along with Selective Service (if applicable) and Legal to Work status.

<sup>3</sup> Customers that are DW eligible are co-enrolled in Adult if 18 years or older. The enrollment episode is presented as a single enrollment in DW only in I-Trac, but will report to the state and DOL as both Adult and DW and customers' service can be paid from either or both grants.

All individuals receiving priority of service must have a document that demonstrates their status in their participant file. For veterans (or their spouses) to receive priority of service, they must provide a copy of their military issued Veteran Identification Card (VIC) or DD-214. Per WIOA section 134(c)(3)(E), priority shall also be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient for Adult employment and training activities. Verification of such status must be completed and documented by the Talent Development Specialist when completing I-Trac registration for the customer.

Approved:\_\_\_\_\_

Jessica Gomez, RWP Chair

Date:\_\_\_\_\_



## ACTION BRIEF

DATE: September 7, 2017

TO: Rogue Workforce Partnership

FROM: Aurora King, Chief Operating Officer

SUBJECT: Youth Eligibility and Enrollment Policy Approval

## **BACKGROUND**

Rogue Workforce Partnership (RWP) expects sub-recipients funded with Workforce Innovation and Opportunity Act resources to make every effort to integrate and align services to eligible youth as part of a broader vision to leverage other Federal, state, local, and philanthropic resources to support in-school youth (ISY) and out-of-school youth (OSY). RWP investments into youth services are intended to assure that disadvantaged youth are able to become employed and continue along career paths that lead to greater self-sufficiency. Under Federal law, 25% of funds allocated to local workforce development boards must be spent on in-school youth services, and 75% of funds allocated to local workforce development boards must be spent on out-of-school services. Additionally, at least 20% of a local area's total youth allocation must be spent on work experience activities (as defined below).

In-school youth (ISY) are aged 14-21, and out-of-school youth are aged 16-24. All youth must meet a variety of eligibility criteria (as outlined in the attached policy) to demonstrate their need for WIOA services.

When enrolled in WIOA services, it is the expectation for RWP sub-recipients to offer 14 program elements to serve such youth through their in-house program model, or through community partnerships. The 14 elements are as follows:

- Tutoring, study skills training, instruction, and dropout prevention services
- Alternative secondary school services or dropout recovery services
- Paid and Unpaid Work Experiences (including summer employment opportunities and other opportunities available throughout the school year; pre-apprenticeship programs; internships and job shadowing; and on-the-job training)
- Education offered concurrently with workforce preparation and training for a specific occupation
- Leadership development opportunities
- Supportive services



- Adult mentoring
- Follow-up services
- Comprehensive guidance and counseling
- Financial literacy education
- Entrepreneurial skills training
- Services that provide labor market information
- Postsecondary preparation and transition activities

## **SUMMARY**

RWP Staff would request that the Workforce Development Board approve the attached Youth Eligibility and Enrollment Policy.



**TITLE: YOUTH ELIGIBILITY AND ENROLLMENT**

**PURPOSE**

To provide guidance regarding eligibility and enrollment for sub-recipients serving youth in Jackson and Josephine Counties for services funded by WIOA under Title I of the Workforce Innovation and Opportunity Act (WIOA) Section 129.

**POLICY**

Rogue Workforce Partnership (RWP) expects sub-recipients funded with WIOA resources to make every effort to integrate and align services to eligible youth as part of a broader vision to leverage other Federal, state, local, and philanthropic resources to support in-school youth (ISY) and out-of-school youth (OSY). RWP investments into youth services are intended to assure that disadvantaged youth are able to become employed and continue along career paths that lead to greater self-sufficiency.

**WIOA YOUTH ELIGIBILITY CRITERIA**

Under WIOA section 129(a)(1)(B), an out-of-school youth (OSY) is an individual who is:

- A. Not attending any school (as defined under State law);
- B. Not younger than 16 or older than age 24 at time of enrollment. Because age eligibility is based on age at enrollment, participants may continue to receive services beyond the age of 24 once they are enrolled in the program; and
- C. One or more of the following:
  1. A school dropout;
  2. A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter. School year calendar quarter is based on how a local school district defines its school year quarters;
  3. A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is either basic skills deficient or an English language learner;
  4. An individual who is subject to the juvenile or adult justice system;
  5. A homeless individual, a runaway, an individual who is in foster care or has aged out of the foster care system, a child eligible for assistance under Section 477 of the Social Security Act, or an individual who is in an out-of-home placement;
  6. An individual who is pregnant or parenting;
  7. An individual with a disability;
  8. A low-income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment. (WIOA Section 129(a)(1)(B).)

Under WIOA section 129(a)(1)(C), an in-school youth (ISY) is an individual who is:

- A. Attending school (as defined by State law), including secondary and postsecondary school;

- B. Not younger than age 14 or (unless an individual with a disability who is attending school under State law) older than age 21 at time of enrollment. Because age eligibility is based on age at enrollment, participants may continue to receive services beyond the age of 21 once they are enrolled in the program;
- C. A low-income individual; and
- D. One or more of the following:
  - 1. Basic skills deficient;
  - 2. An English language learner;
  - 3. An offender;
  - 4. A homeless individual, a homeless child or youth, a runaway, in foster care or has aged out of the foster care system, a child eligible for assistance under sec. 477 of the Social Security Act, or in an out-of-home placement;
  - 5. An individual who is pregnant or parenting;
  - 6. An individual with a disability;
  - 7. An individual who requires additional assistance to complete an educational program or to secure or hold employment. (WIOA Section 129(a)(1)(C).)

**Eligibility Changes:** There are a number of significant changes in eligibility from WIA to WIOA. The pool of individuals that meet the eligibility as an OSY has significantly increased due to three changes:

- 1. Increased age eligibility allows youth through age 24 to be eligible as an OSY;
- 2. Only two categories of OSY (categories (c)(3) and (c)(8) above) require low income for eligibility;
- 3. Those of compulsory school age who have not attended school in the most recent school year quarter are considered OSY. For purposes of Title I of WIOA, the Department does not consider providers of Adult Education under Title II of WIOA, YouthBuild programs, and Job Corps programs to be "schools." Therefore, WIOA youth programs may consider a youth to be OSY for purposes of WIOA youth program eligibility if they are attending Adult Education provided under Title II of WIOA, YouthBuild, or Job Corps.

## OUT OF SCHOOL YOUTH (OSY)

- A. Sub-recipients shall use at least 75 percent of WIOA Title I Youth program resources available (after administrative costs have been deducted) to serve OSY as defined by WIOA and Oregon WIOA Title 1B Youth Eligibility Policy reference number 129 (a)(1)(B) & (C).
- B. RWP defines OSY who require “additional assistance” as youth who meet the OSY enrollment criteria, are low income and can benefit from the provision of any of the required 14 youth program elements described at 20 CFR 681.310 in order to enter or complete an educational program or to secure or hold employment. The required program elements include:
  - 1. Tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential;
  - 2. Alternative secondary school services, or dropout recovery services, as appropriate;
  - 3. Paid and unpaid work experiences that have as a component academic and occupational education, which may include:
    - a. Summer employment opportunities and other employment opportunities available throughout school year;
    - b. Pre-apprenticeship programs;
    - c. Internships and job shadowing; and
    - d. On-the-job training opportunities;
  - 4. Occupational skill training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials aligned with in-demand industry sectors or occupations in the local area involved, if the local board determines that the programs meet the quality criteria described in section 123; WIOA 129(a)(1)(B)&(C)
  - 5. Education offered concurrently with, and in the same context as, workforce preparation activities and training for a specific occupation or occupational cluster;
  - 6. Leadership development opportunities, which may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate;
  - 7. Supportive services;
  - 8. Adult mentoring for the period of participation and a subsequent period, for a total of not less than 12 months;
  - 9. Follow-up services for not less than 12 months after the completion of participation;
  - 10. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate;
  - 11. Financial literacy education;
  - 12. Entrepreneurial skills training;
  - 13. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
  - 14. Activities that help youth prepare for and transition to postsecondary education and training. (WIOA Sec. 129 (c) (2)).

Additionally, sub-recipients are expected to prioritize OSY identified via WorkSource Rogue Valley. OSY aged 18 or older should also be co-enrolled as WIOA Title I Adults and/or Dislocated Worker when appropriate.

## **ELIGIBILITY WAIVERS**

When applicable, RWP will provide low-income waivers to not more than five percent of the participants served annually by WIOA Youth sub recipients, provided the participant meets all other eligibility criteria.

Management of the low-income waivers will be conducted by RWP Staff and requested through their sub-recipient, and will be available primarily on a first-come, first-served basis (Veterans and other priority populations will receive priority), and this approach shall be applied consistently among applicants to avoid disparate treatment of applicants. Participants may not be enrolled until the service provider has received approval of an income waiver request from RWP Staff.

Waiver enrollments will be tracked through I-Trac, the local Management Information System (MIS) customer tracking system. All low-income waiver requests must be submitted to RWP Staff via e-mail after the applicant's information has been entered into the I-Trac online application.

The e-mail must contain:

- I-Trac identification number
- First and last name of applicant
- Applicant's motivation and goals
- Why applicant is a good fit for Workforce Innovation and Opportunity Act (WIOA) funded services
- Any other relevant information

The request will be reviewed by RWP Staff and an email response will be sent back. If approved, authorization for enrollment will be entered into I-Trac.

RWP Staff will monitor the five percent rule across all WIOA Youth sub-recipients. Sub-recipient staff will ask RWP staff for approval on the five percent waiver for a participant. (See RWP Policy Youth Needing Additional Assistance for more information.)

## **IN-SCHOOL YOUTH (ISY)**

Sub-recipients must not expend more than 25 percent of WIOA Title I Youth program resources available (after administrative have been deducted) to serve ISY as defined by WIOA and Oregon WIOA Title 1B Youth Eligibility Policy # 129 (a)(1)(B) & (C)

- RWP expects no more than 25% of participants enrolled as youth will be enrolled as ISY.
- RWP defines ISY who require "additional assistance" as youth who meet the ISY enrollment criteria, are low income and can benefit from the provision of any of the required 14 youth program elements described at 20 CFR 681.310 in order to enter or complete an educational program or to secure or hold employment (a complete list of the 14 elements is provided in the OSY section of this policy)

## PROCESS

- Each eligible youth must be provided with an objective assessment of academic and skill levels and service needs, in order to develop an individual service strategy (ISS) directly linked to one or more performance indicators and that identifies career pathways that include education and employment goals.
- All youth will be provided access to the required 14 program elements. The program elements identified as appropriate for the participant must be based on the objective assessment and the plan developed in the Individual Service Strategy (WIOA Sec. 129 (c)(1)).

A copy of this and other policies may be found at [www.rogueworkforce.org](http://www.rogueworkforce.org).

Approved: \_\_\_\_\_  
Jessica Gomez, RWP Chair

Date: \_\_\_\_\_



## ACTION BRIEF

DATE: September 6, 2017

TO: Rogue Workforce Partnership

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: WIOA Sub-Recipient Monitoring Policy Approval

### **BACKGROUND**

There are many federal laws and state policies that we must adhere to as the receipt of federal funds, one of which is the monitoring of our sub-recipients. Sub-recipients are those entities with whom we contract to provide workforce services, and who are responsible for both WIOA performance and compliance with WIOA rules and regulations. Rogue Workforce Partnership currently has three sub-recipients: ResCare Workforce Services (for WIOA Adult, Dislocated Worker, and Out-of-School Youth); College Dreams (for WIOA In-School Youth); and our new One-Stop Operator, to be approved by the Board later in this agenda.

In the monitoring process, RWP is charged with determining whether the sub-recipient is in compliance with the requirements of WIOA, the activities of our Statement of Work, performance reporting requirements, and other terms and conditions of our contract. RWP must attest that we have examined their program and financial data, and found them in compliance.

The results of our monitoring process must be presented to both the Higher Education Coordinating Commission (HECC) in their monitoring of RWP as a sub-recipient, as well as to our financial auditors. We must also demonstrate that we have a policy that outlines our procedures in performing the monitoring of our sub-recipients. The attached policy satisfies that requirement.

### **SUMMARY**

RWP Staff would request that the Workforce Development Board approve the attached Monitoring Policy.



**ROGUE WORKFORCE  
PARTNERSHIP**

**Administrative Policy** ☒

**Standard Operating Procedure** ☐

**Effective Date:** 7/1/2015

☒ **New**

☐ **Revised**

**TITLE: WIOA SUB-RECIPIENT MONITORING**

**PURPOSE**

The purpose of this policy is to outline procedures Rogue Workforce Partnership (RWP) will use to conduct monitoring of Workforce Innovation and Opportunity Act (WIOA) sub-recipients to ensure compliance of programs in Jackson and Josephine County who are receiving WIOA funding.

**REFERENCES**

WIOA, Section 107(d)(8) and Section 185

20 CFR 667.400

20 CFR 683.410

2 CFR 200

Community Colleges and Workforce Development Policy 589-40.6

**POLICY**

RWP will conduct annual monitoring of each sub-recipient to ensure compliance with WIOA rules and regulations. This monitoring will consist of an on-site review and desk audit.

**PROCEDURE**

RWP will contact sub-recipients approximately one month prior to the visit to establish the date and time that the on-site monitoring will take place. During the 30-day period, sub-recipients will be asked to provide response information to the monitoring guide. After the sub-recipient has provided responses to RWP prior to, or on the due date for receiving the completed monitoring guide, RWP will conduct a desk audit including sub-recipient staff interviews, a review of the contract scope of work deliverables, and performance metrics, budget activity, and an audit of participant data (including both paper and electronic records).

**On-Site Visit:**

At initiation of the on-site review, RWP will conduct an entrance interview with the appropriate personnel to convey the focus of the visit and go over specific tasks to be completed during the visit. A tour of the site will be conducted to assess the adequacy of the facility as it relates to health and safety, accessibility for the disabled, comfort, adequacy of training equipment and materials, and any other issues affecting programmatic compliance. (See Attachment A – On-site Inspection Checklist)

During the on-site visit, documentation to be reviewed may include, but not be limited to, administrative records, contract files, fiscal records, and participant files. Interviews will be conducted with program provider staff, participants and employers to obtain information about program administration, operations, and the quality and effectiveness of training.

RWP will review and determine contractual compliance and determine the causes of any area of non-performance.

RWP will conduct an exit conference with the program administrator and fiscal manager to discuss monitoring results, identify any required corrective actions, and offer technical assistance.





ROGUE WORKFORCE  
PARTNERSHIP

Administrative Policy ☒

Standard Operating Procedure ☐

Effective Date: 7/1/2015

☒ New

☐ Revised

**TITLE: MONITORING**

**Monitoring Report:**

RWP will provide a draft monitoring report within 30 calendar days after completion of the review. Sub recipients will have 30 days to respond with corrective action plans. RWP will consider those actions and return a final report to the sub-recipient within 15 days of receipt. Where corrective action is required, RWP will conduct a follow-up review within 30 days.

RWP will maintain a monitoring tracking log (see Attachment B) of all sub-recipients that will detail the sub-recipient monitored, the start date and end date of monitoring, and the program year and fiscal year monitored. If the monitoring has resulted in findings or other reportable items, the log will detail compliance status, resolution or remedies, and, if items remain unresolved, explanations on when resolution is expected.

APPROVED: \_\_\_\_\_  
Jessica Gomez, RWP Chair

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

Workforce Innovation & Opportunity Act  
On-Site Inspection Check List



**ROGUE WORKFORCE  
PARTNERSHIP**

Date: \_\_\_\_ / \_\_\_\_ / \_\_\_\_

Subrecipient: \_\_\_\_\_

Location: \_\_\_\_\_

**INSPECTED ITEM(S)**

- ☐ Locked Files
- ☐ Confidential information in desk area is protected
- ☐ Computer Screens are locked (if applicable)
- ☐ EO Posters are posted in high traffic areas with correct contact information
- ☐ DOL Hotline number is posted and visible
- ☐ Location is ADA Accessible & Adaptive Technology is Operational
- ☐ Inventory Completed (if applicable)

Notes: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_  
RWP Staff Inspecting

\_\_\_\_ / \_\_\_\_ / \_\_\_\_  
Date

[illegible]



## **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 anticipate 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, 2018**

	CURRENT YEAR 2017-18	PRIOR YEAR 2016-17	DIFFERENCE
<b>REVENUES</b>			
<b>WORKFORCE INNOVATION &amp; OPPORTUNITY ACT</b>			
Title 1B Adult	1,130,615	561,845	568,770
Title 1B Dislocated Worker	1,276,272	1,192,526	83,746
Title 1B Youth	992,799	1,247,141	(254,342)
Job-Driven National Emergency Grant	0	212,856	(212,856)
Rapid Response	4,000	24,690	(20,690)
Layoff Aversion	0	45,287	(45,287)
Transition Grant	0	15,000	(15,000)
<b>WIOA SUBTOTAL</b>	<b>3,403,685</b>	<b>3,299,345</b>	<b>104,340</b>
<b>OTHER INCOME</b>			
Applegate Trails Association	0	30,000	(30,000)
Back to Work Oregon	210,950	437,811	(226,861)
Careers in Gear	20,000	18,050	1,950
Independent Living	18,000	20,104	(2,104)
Local Board Support	78,480	129,648	(51,168)
National Fish & Wildlife Foundation	3,000	40,643	(37,643)
REACH	0	416,984	(416,984)
Rethinking Job Search	72,000	61,223	10,777
Sector Strategies	78,480	146,419	(67,939)
Siskiyou Uplands Trails Association	0	35,000	(35,000)
SOESD (CC4A)	45,000	52,039	(7,039)
SOHOPE	0	106,249	(106,249)
TANF Summer Jobs Program	80,104	0	80,104
Miscellaneous Income	2,500	2,539	(39)
Rental Income / Cost Reimbursements	335,302	335,302	0
<b>OTHER INCOME SUBTOTAL</b>	<b>943,816</b>	<b>1,832,011</b>	<b>(888,195)</b>
<b>TOTAL REVENUES</b>	<b>4,347,501</b>	<b>5,131,356</b>	<b>(783,855)</b>
<b>EXPENDITURES</b>			
<b>SERVICES</b>			
Personnel	750,460	828,381	(77,921)
Contracted Workforce Services	2,438,335	3,542,986	(1,104,651)
RWP Operating Expense	334,704	290,911	43,793
One Stop Operating Expense	574,003	469,078	104,925
Holdback / Carry Out into following year	250,000	0	250,000
<b>TOTAL EXPENDITURES</b>	<b>4,347,501</b>	<b>5,131,356</b>	<b>(783,855)</b>



DATE: September 6, 2017

TO: Rogue Valley Workforce Development Board

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: PY17 Budget Affirmation

## **BACKGROUND**

On July 20, 2017, we presented to the RWP Corporate Board the attached budget for the 2017-2018 program year (PY17). The total annual budget amount is \$4,347,501, which is a decrease of \$783,855 from the previous year.

The attached memo, dated July 13, 2017, contains the information provided to the Corporate Board at its meeting, and shares the details of the various budget components. The Corporate Board unanimously approved this proposed budget.

As an update to the Corporate Board memo, it was mentioned in the last bullet point under “Other Income” that we were awaiting final allocations on our State General Fund grants. We had estimated at that time that we would be receiving a total of \$367,910 for the three grants. We found out this last week that we will be receiving \$353,850, or \$14,060 less than we projected. We’re relieved that at least it was close.

## **SUMMARY**

RWP Staff would request that the Workforce Development Board affirm the PY 17 RWP Budget of \$4,347,501 that was approved on July 20, 2017, by the Corporate Board.





# ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

DATE: July 13, 2017

TO: Rogue Valley Workforce Consortium and  
Rogue Workforce Partnership Corporate Directors

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: PY17 Budget

## **BACKGROUND**

As it's the beginning of the new program year, it's time to present the budget for the coming year. There are still many uncertainties, but we will proceed with what we do know. At this point, our PY17 revenues and expenditures are at \$4,347,501, a decrease of \$783,855 from last year. Below are explanations of the various line items in the attached budget document.

## **DISCUSSION**

### **WORKFORCE INNOVATION & OPPORTUNITY ACT (WIOA)**

As we have recently informed you, the State and local WIOA formula allocation was decreased for this year. The U.S. Department of Labor decreased the allocation to the State of Oregon by just over 10%, and the State decreased our local allocation by 11.2% (there were a couple of areas that received an increase, and only one area that received a decrease larger than ours). The State wanted to maintain a local allocation cut of no more than 10%, so they came up with some additional funds to supplement our loss: additional 2016 High Concentration Youth and additional FY16 Dislocated Worker formula funds. As a result, our overall formula allocation decreased by 7.28%.

Fortunately, both RWP and ResCare have been frugal with our funds this past year, so we have a decent amount of carry-forward into PY17. You can see the breakdown below:

WIOA Fund	PY17 Allocation	PY16 Carry-Fwd	Supplemental Funds	TOTALS
Adult	\$ 906,955	\$ 223,660		\$1,130,615
Dislocated Worker	\$ 827,862	\$ 344,570	\$ 103,840	\$1,276,272
Youth	\$ 964,719	\$ 299,290	\$ 28,080	\$ 992,799
Total	\$2,699,536	\$ 867,520	\$ 131,920	\$3,399,686

As for the non-formula WIOA funds, the Job-Driven National Emergency Grant, the Layoff Aversion Grant, and the Transition Grant all expired as of June 30, 2017, so we show no income for those in PY17. As for the Rapid Response Grant, that project will be phasing out this year and we anticipate spending only about \$4,000. The result is that we will be receiving \$104,340 less in WIOA funds in PY17 compared with PY16.

## OTHER INCOME

There are various reasons for the decrease of over \$1.26 million dollars in Other Income:

- The REACH and SOHOPE grants were given to us by Department of Human Services (DHS) and Rogue Community College (RCC), respectively. These were pilot programs we were able to launch that have now taken lives of their own. The REACH activity has now been incorporated into the direct DHS grant with ResCare (along with JOBS and OFSET), and the SOHOPE activity has now been absorbed back into RCC.
- The Careers in Gear, Independent Living, Rethinking Job Search, and SOESD (College and Careers for All) grants, as well as Miscellaneous Income and Rental Income, are continuing into a subsequent year at just about the same levels.
- The National Fish and Wildlife Foundation grant is just about finished, and we've budgeted \$3,000 to get that done.
- The Temporary Assistance to Needy Families (TANF) Summer Jobs Program is a new opportunity granted to us by DHS. They have granted us over \$80,000 to help provide summer work experience to teen parents receiving TANF benefits.
- Our recent contracts with Applegate Trails Association and Siskiyou Uplands Trails Association have been very successful in providing trail crew work to many. Our most recent contracts have expired, but they have indicated that they would like to work with us on a continuing basis, and we expect new contracts soon.
- We were just informed that the State Legislature has approved the state budget, and that our General Fund grants -- Back to Work Oregon, Local Board Support, and Sector Strategies -- have survived. Included in the last biennium (2015-16) was \$8.4 million for these grants; but this biennium \$7.6 million was granted -- a 9.5% decrease. We are still thrilled that we're receiving these grants since they are so critical to our mission.

We will not find out the final allocations until mid-August, but for budget purposes, we have taken the amounts we received last biennium and decreased them by 9.5%. Then we placed half of that amount into this first year of the biennium.

You'll note that there is a large difference between the amounts we've budgeted for the current year and those from the previous year. That's because the State was late getting the grants out in the last biennium, and we got a late start on spending. So we had a substantial amount more to spend in the second year of the biennium in order to spend out the grant. Even though we anticipate that the contracts will be late again this year, we know that they will have an effective date of July 1, 2017, and we'll be able to get started immediately.

## EXPENDITURES

Personnel costs are down by almost \$78,000 compared to the previous year. We currently have one vacant position, and we are being cautious in refilling that position with our current decrease in income.

Contracted Workforce Services represent amounts to be paid to just our two sub-contractors, ResCare and College Dreams. This budget projection has decreased dramatically (by more than \$1.1 million), but part of that decrease is in presentation. The Contracted Services line item in the previous year contained ALL contracted services, which included many different types of contracted expenses. Over \$176,000 of other contracted services were a part of the previous year's \$3.5 million line item; but those are now included in either RWP or One Stop Operating Expenses. Nevertheless, there is a significant hit to our two workforce service providers, to the tune of almost \$1 million.

Even though ResCare is absorbing most of this cut, it should be noted that they are incorporating the REACH program activities (currently at \$416,984) into the JOBS contract that they have directly from DHS. They also have recently completed some restructuring to reduce some of their mid-management positions. But certainly more adjustments will need to be made.

Adding together the RWP and One Stop Operating Expenses shows an increase of over \$148,000; however, as noted above, there is a different presentation. The \$176,000 mentioned above consisting of expenses previously categorized in Contracted Services are now included in these two line items; so there is actually a slight net decrease in current year expenditures.

There is also a less noticeable difference in presentation between the two Operating Expense line items. Under our new Cost Sharing Agreement with our partner agencies, we have to present expenses in a different format, to ensure that all One Stop expenditures are appropriately captured and reported.

Finally, there is \$250,000 budgeted as funds to be carried forward into the following year. It is always desirable to have some "cushion" from year to year so we're not pushed into a corner by unexpected surprises.

## SUMMARY

RWP Staff would request that the Rogue Valley Workforce Consortium, as well as the Rogue Workforce Partnership Corporate Directors approve the PY17 budget in the amount of \$4,347,501.

**ROGUE WORKFORCE PARTNERSHIP  
BUDGET FOR YEAR ENDING JUNE 30, 2018**

	CURRENT YEAR 2017-18	PRIOR YEAR 2016-17	DIFFERENCE
<b>REVENUES</b>			
<b>WORKFORCE INNOVATION &amp; OPPORTUNITY ACT</b>			
Title 1B Adult	1,130,615	561,845	568,770
Title 1B Dislocated Worker	1,276,272	1,192,526	83,746
Title 1B Youth	992,799	1,247,141	(254,342)
Job-Driven National Emergency Grant	0	212,856	(212,856)
Rapid Response	4,000	24,690	(20,690)
Layoff Aversion	0	45,287	(45,287)
Transition Grant	0	15,000	(15,000)
<b>WIOA SUBTOTAL</b>	<b>3,403,685</b>	<b>3,299,345</b>	<b>104,340</b>
<b>OTHER INCOME</b>			
Applegate Trails Association	0	30,000	(30,000)
Back to Work Oregon	210,950	437,811	(226,861)
Careers in Gear	20,000	18,050	1,950
Independent Living	18,000	20,104	(2,104)
Local Board Support	78,480	129,648	(51,168)
National Fish & Wildlife Foundation	3,000	40,643	(37,643)
REACH	0	416,984	(416,984)
Rethinking Job Search	72,000	61,223	10,777
Sector Strategies	78,480	146,419	(67,939)
Siskiyou Uplands Trails Association	0	35,000	(35,000)
SOESD (CC4A)	45,000	52,039	(7,039)
SOHOPE	0	106,249	(106,249)
TANF Summer Jobs Program	80,104	0	80,104
Miscellaneous Income	2,500	2,539	(39)
Rental Income / Cost Reimbursements	335,302	335,302	0
<b>OTHER INCOME SUBTOTAL</b>	<b>943,816</b>	<b>1,832,011</b>	<b>(888,195)</b>
<b>TOTAL REVENUES</b>	<b>4,347,501</b>	<b>5,131,356</b>	<b>(783,855)</b>
<b>EXPENDITURES</b>			
<b>SERVICES</b>			
Personnel	750,460	828,381	(77,921)
Contracted Workforce Services	2,438,335	3,542,986	(1,104,651)
RWP Operating Expense	334,704	290,911	43,793
One Stop Operating Expense	574,003	469,078	104,925
Holdback / Carry Out into following year	250,000	0	250,000
<b>TOTAL EXPENDITURES</b>	<b>4,347,501</b>	<b>5,131,356</b>	<b>(783,855)</b>



**ROGUE WORKFORCE  
PARTNERSHIP**

August 31, 2017

Aaron Fox  
Executive Director  
Oregon Manufacturing Extension Partnership  
7650 SW Beveland Street, Suite 170  
Portland, OR 9723

Re: Contract between Rogue Workforce Partnership and OMEP

Dear Aaron,

I am pleased to inform you that the Oregon Manufacturing Extension Partnership has been selected to serve as the Rogue Valley's One-Stop Operator as required under the Workforce Innovation and Opportunity Act (WIOA) of 2014.

The Rogue Workforce Partnership - Corporate Directors (Executive Committee) approved this action at its meeting on August 30, 2017. The full RWP - Workforce Development Board will affirm and ratify this decision at a next scheduled meeting in which a quorum is present (next scheduled for September 14, 2017).

As we discussed during our last videoconference call, we will be working with you in the coming weeks to develop and finalize a contract to provide these One-Stop Operator services. This will include coming to an agreement on a specific statement of work, budget, and deliverables. The source of funding for these services will come as a part of a cost-sharing agreement of the required WIOA partners, as stipulated under regulations promulgated by the U.S. Department of Labor. This contract will be in effect for the period from July 1, 2017 through June 30, 2018. During this pilot year we will evaluate the implementation of this new contractual arrangement and make a determination for a contract extension well in advance of the June 30th end date.

We are very excited to work closely with an organization with the expertise of OMEP. We look forward to a highly productive working relationship. If you have any questions, please do not hesitate to contact me.

Sincerely,

James G. Fong  
Executive Director

cc: Rogue Workforce Partnership  
Commissioner Dan DeYoung, Josephine County Board of Commissioners  
Commissioner Rick Dyer, Jackson County Board of Commissioners

**Rogue Workforce Partnership One-Stop Operator Cover Letter**

Organization: Oregon Manufacturing Extension Partnership, Inc.	Federal Tax ID Number: 93-1315027
Address: 7650 SW Beveland Street, Suite 170 Portland OR, 97223	Duns Number: 13-170-7338
Organization Contact: Michelle Fusak	
Phone: 503-406-3778	
Fax: 503-406-3779	
Email: mfusak@omep.org	
Fiscal Agent/Address: same	Contract Signer's Name: Aaron Fox
Fiscal Contact Name: Denise Masanga	Contract Signature Address: same
Phone: 503-406-3773	Phone: 503-406-3772
Fax: N/A	Fax: N/A
Email: dmasanga@omep.org	Email: afox@omep.org

**DOCUMENTS:**

**X Cover Letter**

**X Proposer Information – Attachment #1**

**X Narrative**

**X Budget Attachment**

  
SIGNATURE OF APPLICANT

8/17/2017

DATE

Michelle Fusak

TYPED NAME

ATTACHMENT # 1

PROPOSER INFORMATION

Proposer Name: OMEP

Primary Contact Person: Michelle Fusak

Title: VP of Finance and Operations

Address: 7650 SW Beveland St, Suite 170

City, State, Zip: Portland, OR, 97222

Telephone: 503-406-3778 Fax: 503-406-3779

E-mail Address: mfusak@omep.org

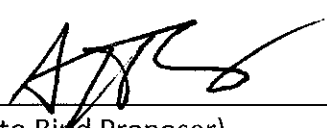
Name and title of the person(s) authorized to represent the Proposer in any negotiations and sign any Personal Services Contract that may result:

Name: Aaron Fox

Title: President

By signing this page and submitting a Proposal, the Authorized Representative certifies that the following statements are true:

1. No attempt has been made or will be made by the Proposer to induce any other person or organization to submit or not submit a Proposal.
2. Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, sex, disability, sexual orientation or national origin, nor has Proposer or will Proposer discriminate against a subcontractor in the awarding of a subcontract because the subcontractor is a minority, women or emerging small business enterprise certified under ORS 200.055.
3. Information and costs included in this Proposal shall remain valid for 90 days after the Proposal due date or until a Contract is approved, whichever comes first.
4. The statements contained in this Proposal are true and complete to the best of the Proposer's knowledge and Proposer accepts as a condition of the Contract, the obligation to comply with the applicable state and federal requirements, policies, standards, and regulations. The undersigned recognizes that this is a public document and open to public inspection.
5. The Proposer, by submitting a Proposal in response to this Request for Proposals, certifies that it understands that any statement or representation contained in, or attached to, its Proposal, and any statement, representation, or application the Proposer may submit under any contract DHS may award under this Request for Proposals, that constitutes a "claim" (as defined by the Oregon False Claims Act, ORS 180.750(1)), is subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.
6. The Proposer acknowledges receipt of all addenda issued under this RFP.

Signature: 

Date: 8/17/17

(Authorized to Bind Proposer)

## Rogue Workforce Partnership One-Stop Operator Proposal Narrative

### Section A. Proposed Work / Demonstration of Effectiveness

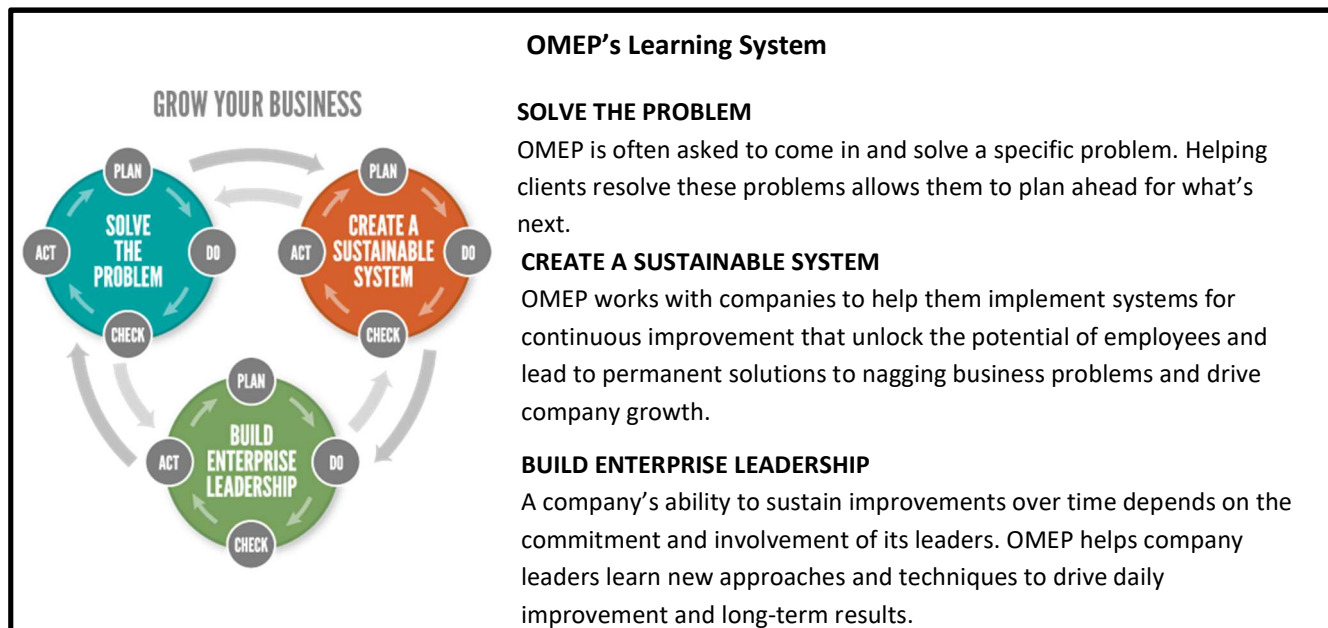
Describe the work your organization(s) would do in performing the coordination role of the One-Stop Operator.

- **How would you go about performing the duties, creating greater integration and alignment between workforce programs, and achieving results?**

OMEP relies on Lean Enterprise thinking and tools, particularly Value Stream Mapping, to help its clients develop a deeper understanding of the processes, policies, and procedures that might cause barriers to the flow of work and information. Value Stream Mapping is a powerful analysis and diagnostic tool that allows project participants to measure and see barriers to flow, areas of waste, and opportunities for the application of high performance tools. Originally developed for manufacturing, this approach is equally effective when applied to product/service and information flows.

In addition to Lean tools, OMEP has experience with customer service practices in both the public and private sectors. Wherever feasible, OMEP accomplishes its work through partnership and tight connections to workforce, economic development and industry groups interested to supporting the Oregon manufacturing sector.

Whatever the need, OMEP offers the tools, expertise, and the flexibility to engage with companies and agencies at all levels. OMEP always seeks to maximize the results for its clients and provide them with the guidance to meet or exceed the performance of their competitors or stakeholders' requirements.





**Approach:** OMEP will approach the One Stop Operator engagement as a continuous improvement assignment, focusing primarily on working with staff and leadership to

- Develop measurement systems that provide insight into performance on desired outcomes
- Diagnose problem areas and search for root cause
- Design approaches to accomplishing work that will help eliminate or minimize the waste and barriers to flow
- Measure the results of implementation experiments against the desired outcomes
- Build on successes and adjust activity based on experiment results

With respect to the need for certification and other compliance issues, OMEP will work with One Stop staff and leadership to develop a system of guided self-assessment and corrective action planning sufficient to satisfy regulatory requirements.

OMEP's client service routinely incorporates a significant element of organizational structure and systems analysis. Our approach to analysis begins at the system level as we attempt to understand the supplier-input-process-output-customer relationships within the system. Our ultimate goal is to work with the client to create a demand flow system where streamlined activities are linked together and subordinated to providing the customer its desired product, when it is needed, at the required quality level, and at a cost that allows for a sustaining enterprise. This activity invariably results in some organizational restructuring.

OMEP's key value is to "Solve problems thoughtfully". As Oregon's leading provider of operational excellence consulting, the application of continuous improvement (CI) principles forms the core of our service delivery. Since 2000, OMEP has worked with over 500 businesses, agencies, and governmental entities on continuous improvement projects of various shapes and sizes. While we are guided by lean enterprise principles, a core element of the OMEP Way is to "bend service around demand." OMEP works with the client to identify the barriers to its success and then seeks to apply the appropriate tools in a facilitated effort to help move the client to a higher level of performance.

While internal organizational improvements are a likely starting place for CI efforts, ultimate achievement of operational excellence always entails looking at partnerships with customers, suppliers, regulators, and other system participants to ensure that their combined efforts result in shared gain. Currently, we are engaged in several efforts to tie together the solo efforts of small food processing companies to comply with the Food Modernization and Safety Act (FSMA) in a cohort approach whereby each company can learn from their peer experiences as they move toward certification. This requires the ability to help each company understand the long term benefit of an effort that provides them the opportunity to be a teacher or alternatively, a learner.

- **Give examples of the kinds of improved results and improvements in the operation of the one-stop center and the workforce system that you anticipate could be achieved from your efforts.**

OMEP has, itself, been involved in multiple organizational efforts at accomplishing economic development and workforce development goals. Recently, OMEP staff was rewarded for its system work in implementing the Make It In Willamette Valley grant that was jointly funded by EDA, DOL, and DOC and involved the participation of SEDCOR, Incite, Mid-Willamette Valley Council of

Governments, and OMEP. OMEP sought to both provide services to client manufacturers and to contribute to the success of the collaboration by providing system CI thinking. Some specific examples of improved results and operational improvement include:

*Business Oregon.* OMEP has served as a continuous improvement and organizational development consultant for Business Oregon since 2010. In the course of this engagement, we have assisted various departments (primarily the Infrastructure Finance Authority) in projects focused both on the improvement of internal processes and the agency's ability to improve service to customers. Assignments that have occurred in the last three years include:

- "Customer" feedback surveys (2014-15)--OMEP built a process-focused system of timely feedback (within 6 months or less of service delivery) that also measured conformance with statutory requirements. This allowed the department to respond more frequently and effectively to the voice of the customer. The primary activity of this project occurred in Salem, OR, but the project addressed IFA activities throughout the state with various cities, counties, and special districts.
- Leadership development (2014)—Members of the Infrastructure Finance Authority worked with OMEP to understand how to blend their approach to leadership with a continuous improvement culture. The specific training course is called Tools for Conscious Leadership. This activity occurred in Salem, OR
- Problem solving and visual management (2010-present)--Throughout the entire engagement, OMEP have continued to implement the deployment visual tools to lead problem solving analyses. This activity occurred in Salem, OR
- Reorganizational analysis and restructuring (2017-present)—OMEP has been engaged to perform a variety of efforts primarily resulting from the reorganization of Business Oregon in 2016. Currently we are assisting in the blending two formerly separate organizations with overlapping responsibilities. Business Oregon and IFA have been separate for nearly 10 years and with the recent reorganization were brought back together. OMEP is helping Business Oregon to look beyond job titles, roles and responsibilities and focus on the demand for work from a more holistic, customer serving perspective. The current focus is on accurately describing demand and performance measures and on building a comprehensive cross training matrix so that the management team can correctly gage capacity of the organization, training needs and overall effectiveness of programs. This is task requires coordinating people from historically different organizations, different functional groups and different geographic regions of the state. The activity is taking place in Salem and Portland, OR.
- Value Stream Mapping and Job Task Analysis for the Export Promotion (2017)--This is a small team, focused project using VSM and waste identification theories to optimize an existing process that was largely non-value added and create departmental Key Performance Indicators that provide more opportunities for measuring and adjusting the process in the future. The activity is taking place in Salem and Portland, OR.

## **Section B. Organizational Experience and Leadership Expertise**

**Describe the following:**

**1) The leadership experience and expertise of your local management team in:**

- (a) Coordinating service delivery of required WIOA one-stop partners / service providers in a One-Stop Center**

OMEP was selected in a competitive process to be the One-Stop Operator for the Lane Workforce Partnership, East Cascade Workforce Investment Board, Clackamas Workforce Partnership, Incite, and the Northwest Oregon Works. OMEP has a staffing plan in place to meet the needs of each of these partners and service providers. For the Rogue Workforce Partnership, OMEP proposes the following staffing plan:

**Staffing:** OMEP will deploy a variety of staff experts on this project. While part of the initial assessment of work will incorporate a skills and compatibility review to finalize staff assignments, it is likely that the following individuals will be assigned to the One Stop Operator project team.

*Paola Castaldo, OMEP Managing Consultant.* Paola will serve as OMEP’s project executive. As such, she will be responsible for engagement planning and work design, staff assignments, project evaluation and overall client relations. Paola brings more than 25 years of engineering, management, and marketing experience to OMEP in a variety of manufacturing and business environments. She has successfully helped companies re-engineer processes and bring on cultural change utilizing effective lean methodologies. Her experience spans starting up and running her own business, to producing results in large corporations. She is guided by a passion for people to succeed and flourish in business.

Since joining OMEP, Paola has provided project leadership, analysis, and implementation assistance at companies including, Premier Press, FEI Company, Business Oregon, and A.R.E. Manufacturing. Paola served as the lead on the development of OMEP’s SMART Talent program and is the practice leader for that service area. SMART Talent is a program that helps companies design and implement structured on-the-job training methods and career ladders. Paola also led a project with Business Oregon’s Office for Business Inclusion and Diversity, which successfully reduced lead times for certification of MBE/WBE/ESB businesses.

*John Lamy, OMEP Medford Manufacturing Consultant.* John will serve as the process improvement specialist for this project. As such, John will be responsible for leading Value Stream Mapping analyses and action plan development and implementation. John is based in Southern Oregon and has served OMEP clients in a wide range of roles – including R&D, strategy, quality, and manufacturing. John Lamy has over thirty years of experience helping large and small companies grow their businesses. John worked at Hewlett-Packard/Agilent Technologies for many years, serving as an R&D Manager, Quality Manager, and Manufacturing Engineering Manager. As a consultant in OMEP’s Medford office, John also brings value locally as he is familiar with the challenges and opportunities in this region of the state.

**(b) Coordinating service providers across a one-stop delivery system.**

During to last 15 years, OMEP has often operated in partnership with workforce investment boards throughout the state. Interactions with the Workforce system include utilizing Employment Workforce Training Grants provided by WIBs to provide training services in lean manufacturing and other

management tools and techniques to companies; collaborative grant delivery such as those mentioned previously with WSI, CWP and Incite; and VSM analysis and lean implementation activities in WorkSource centers in Northwest Oregon and Southwest Washington through the WIRED grant.

OMEP has the ability to deploy its 13-person statewide consulting staff to assist WorkSource in continuous improvement efforts and help ensure compliance. Since 2003, through its work with Oregon manufacturers, OMEP has led continuous improvement activities that have resulted in:

- The creation and retention of 7,700 jobs
- An increase of \$864,000,000 in new or retained sales
- Cost Savings of greater than \$98,000,000

**(c) Coordinating service delivery in a multi-center area, including comprehensive and affiliate sites.**

OMEP's success is dependent on its partnerships with others, including state and local governments that provide grant funding, secondary institutions such as community colleges that work within OMEP's manufacturing client base to provide required skills training, and community-based organizations that provide grant funding and, in some cases, services to company employees. One such example of the latter is the Mid-Valley Literacy Center, which provides ESL training to one of our client's employees. We have also collaborated extensively with other community-based and government agencies, including entities in the workforce development system, with multiparty grant applications and delivery.

In addition, OMEP coordinates with a variety of governmental, educational, and community non-profit agencies in its annual Manufacturing Day activities. In the Portland region, that effort entails extensive coordination among Worksystems, Inc., Portland region high schools, area manufacturers, and several community-based programs such as Impact NW.

Other types of partnerships that we have facilitated as a third party include customer-supplier relationships where extensive cooperation between and among parties is necessary to ensure effective production.

**2) If applicable, describe your organization's role as a provider of services within a WorkSource Oregon other similar One-Stop Center.**

Similar to the WorkSource centers, OMEP's success is dependent on mutually supportive partnerships. OMEP has a strong history of partnership with the workforce delivery system in Portland metro and Mid-Willamette regions. This is evidenced by formal programmatic and financial relationships through joint or cooperative administration and delivery of several grants similar to those mentioned previously. We have also served as a service delivery partner in those and other grants, particularly in the delivery of lean training to Incite program participants and undertaking service delivery through DOL grants to Oregon manufacturers.

OMEP has participated in several consortium projects since its inception, three of which are described below:

*Metro In-Sourcing Training Initiative (MISTI):* Department of Labor awarded OMEP a \$5 million H-1B grant in 2013 to support a variety of classroom training activities designed to upgrade worker skills in certain high-demand occupations. OMEP developed the grant application in collaboration with Worksystems, Inc. and, throughout the grant period worked closely with WSI, grant sub-recipient, to deploy grant resources. This grant provided OMEP the ability to work closely with WSI in the administration of funds and the delivery of grant resources. Role: Grant recipient. Project collaborator.

*Make it In Willamette Valley:* OMEP worked with Incite, SEDCOR, and Willamette Council of Governments to develop and deploy a series of grants through the “Make it America” program funded by Departments of Commerce and Labor, and the Economic Development Administration. Through this grant, EDA funds were deployed to gather in-depth information on the Salem region’s manufacturing industry, DOL funds were deployed to provide training opportunities for incumbent workers to upgrade their skills in lean and process improvement and DOC funds were used by OMEP to help companies implement lean projects, undertake strategy and business model analysis, and perform supply chain improvement activities. This four-agency collaboration maintained a high degree of interaction and communication throughout the grant period and all grant outcomes were reached or exceeded. Role: DOC grantee. Project collaborator.

*Innovations in Advanced Metals and Materials:* This “JIAC2” grant was jointly funded by DOL, DOC, DOE, and EDA. The grant objectives were to better understand supply chain relationships and bring innovative services to metals and advanced materials companies in the greater Portland region. Recipients/sub-recipients included OMEP, Columbia Region Economic Development Corporation (CREDC), Impact Washington, Greater Portland, Inc., Worksystems, Inc., Clackamas Workforce Partnership, Southwest Washington Workforce Development Commission, and a number of other economic development and non-profit organizations. The effort was coordinated by CREDC and all grant goals were met. Role: Subrecipient. Project participant.

Other consortium projects include, The DOL-funded Renew Northwest (ReNW) grant which included OMEP, WSI, SWWDC, and CWP; a DOL-funded grant to provide lean training to food processing companies which included the MEP centers from Washington, Idaho, and Nevada; and a NIST MEP-funded project that included the Oregon, Washington and Idaho MEP centers and Northwest Food Processors Association to undertake technology acceleration projects with small food processing companies.

# One-Stop Operator Budget Form - Rogue

Organization Name: Oregon Manufacturing Extension Partnership (OMEP)

PERSONNEL EXPENSES				
Job Title	Annual Gross Salary	Annual Taxes & Fringe Benefits	% of FTE Charged to Contract	Total Personnel Expense
Project Consultant	113,000	39,550	15.00%	\$ 22,882.50
Managing Consultant	128,000	44,800	3.00%	\$ 5,184.00
				\$ -
TOTAL PERSONNEL EXPENSES	\$ 241,000	\$ 84,350	18%	\$ 28,066.50

OPERATING EXPENSES		
Budget Line Item	Budget Amount	Line Item Cost Calculation
Travel	\$ 2,592.00	Bi-Weekly trips to RWP, plus project manager oversight 3 visits
Materials, Services & Supplies	\$ 1,534.85	\$5,000 per FTE (historical result), training supplies
Other:		
Other:		
Other:		
Other:		
Other:		
TOTAL OPERATING EXPENSES	\$ 4,126.85	

OVERHEAD EXPENSES			
Budget Line Item	Rate(s)	Budget Amount	Line Item Cost Calculation
Indirect Rate/Admin Costs	10.00%	\$ 2,806.65	Federally approved rate is 50.1%. OMEP agrees to reduce the rate to 10% of salary and fringe for this contract
		\$ -	
TOTAL OVERHEAD EXPENSES		\$ 2,806.65	
PROPOSED BUDGET TOTAL		\$ 35,000.00	

Budget Narrative:				
Personnel: Includes funding for .15 consultant FTE to perform One-Stop Operator efficiency project. In addition, .03 Managing Consultant FTE for advisory support to project. Fringe is based on a rate of 35% which includes health insurance benefits and payroll taxes & fees.				
Operating Expenses: Travel for Consultant and Managing Consultant to meet with Rogue Workforce Partnership. Assumes two trips per month for project consultant at a distance of 25 miles each way. Managing Consultant will travel three times during project to provide senior advisory support. Also includes Supplies for training materials.				
Overhead: Budgeted at 10% of Personnel Expenses. OMEP's federally approved indirect rate is 50.1%, however, OMEP agrees to reduce to 10% for this project.				



This **Memorandum of Understanding** is between the Local Workforce Development Board Rogue Workforce Partnership (RWP), the Chief Elected Officials representing Jackson and Josephine Counties (CEOs), Higher Education Coordinating Council (HECC), Department of Human Services (DHS), the Oregon Employment Department (OED), and the other WIOA partners listed under section IV, relating to the operation of the WorkSource Rogue Valley (WSRV) one-stop service delivery system. This document ensures compliance with WIOA and its implementing regulations, and provides the framework to achieve our shared goal of providing a comprehensive, demand-driven, seamless customer-facing service delivery system.

## **I. BACKGROUND**

On July 22, 2014, President Obama signed the Workforce Innovation and Opportunity Act (WIOA). WIOA is designed to strengthen and improve the nation's public workforce system and help get Americans, including disconnected youth and those with significant barriers to employment, into high-quality jobs and careers and help employers hire and retain skilled workers.

In June 2016, the Departments of Education and Labor issued the final regulations to implement WIOA. The regulations clarify the need and expectation to modernize the nation's workforce system and represent a more integrated, job-driven approach to support communities and expand job growth.

The regulations reaffirm the role of the one-stop delivery system as the cornerstone of the public workforce development system and expect required partners to collaborate to support a seamless customer-focused service delivery network. The regulations further require that programs and providers co-locate, coordinate, and integrate resources, activities and information, so that the system as a whole is accessible for individuals and employers alike. The ultimate goal is to increase the long-term employment outcomes for individuals seeking services, especially those with significant barriers to employment.

In response to the passage of WIOA, the Oregon State Workforce Investment Board (OWIB) developed and approved a new Unified Strategic Workforce Plan. The Unified Strategic Workforce Plan supports the vision of WIOA and provides the State framework for implementing the new law. The Unified Strategic Workforce Plan confirms WorkSource Oregon (WSO) as the statewide one-stop system and requires workforce partners to leverage resources and staff to support and collaborate around the WSO system and the continued implementation and comprehensive use of the WSO Operational Standards.<sup>1</sup>

At the direction of OWIB and the WIOA, RWP developed a local plan to support the State vision and implement WIOA to most effectively meet the needs of business, local job seekers and workers. The local plan was approved by the OWIB in June 2016 and establishes the framework for the implementation of WIOA in Jackson and Josephine Counties.<sup>2</sup>

<sup>1</sup> See: <http://wsostandards.weebly.com/read-the-worksource-oregon-operational-standards-here.html>

<sup>2</sup> The Rogue Valley Local Plan can be found at <http://rogueworkforce.org/our-strategies/strategic-plan/>



## **II. WIOA REQUIREMENTS AND REFERENCES**

- WIOA Section 121(c) requires that RWP develop and enter into a memorandum of understanding between RWP and WSRV system partners.
- WIOA Section 121(b)(1)(A)(iii) mandates all entities that are required partners in a local area to enter into a memorandum of understanding with RWP pursuant to WIOA Section 121(c).
- WIOA Section 121(b)(1) identifies the programs and requires that the services and activities under each of those programs must be made available through WSRV. The entities that receive the funds for each of these programs and/or have the responsibility to administer the respective programs in the Area are required partners under WIOA Section 121(b)(1).
- WIOA Section 121(b)(1)(A)(ii) requires each required partner to use a portion of available funding to maintain the one-stop delivery system, including infrastructure costs.
- WIOA Section 121(b)(1)(A)(iv) indicates that the requirements of each partner's authorizing legislation continue to apply under the WSRV system and that participation in the WSRV system is in addition to other requirements applicable to each partner's program under each authorizing law.

## **III. PURPOSE**

The one-stop delivery system brings together workforce development, educational, and other human resource services in a seamless customer-focused service delivery network that enhances access to the programs' services and improves long-term employment outcomes for individuals. One-stop partners administer separately-funded programs as a set of integrated streamlined services to customers. WIOA calls for strengthening the alignment of workforce programs by imposing unified strategic planning requirements, common performance accountability measures, and requirements governing the one-stop delivery system.

The purposes of this Memorandum of Understanding (MOU) are to:

- Define the roles and responsibilities of RWP and signing parties as it relates to the operation and continued development of the talent development system.
- Coordinate resources to prevent duplication.
- Ensure the effective and efficient delivery of WorkSource services.
- Enhance the Rogue Valley's workforce system to create a seamless customer experience.
- Increase and maximize access to workforce services for individuals with barriers to employment.
- Establish joint processes and procedures that will enable partners to align and integrate programs and activities across the workforce system.

The parties agree to work collaboratively to carry out the provisions of this MOU and advance the quality and effectiveness of the workforce system. In addition, the parties agree to:

- Participate in continuous partnership building.
- Participate in continuous improvement activities.





- Adhere to common data collection and reporting needs.
- Make available to customers, through the workforce development system, the services that are applicable to partners' programs.
- Participate in the operation of the Rogue Valley workforce development system consistent with the terms of the MOU, the local workforce plan and requirements of applicable law.
- Participate in staff capacity-building and development, including, but not limited to, cross-training between partner staff, as well as the region's integrated training forum, Workforce Academy.
- Develop, offer and deliver quality business services that assist targeted industry sectors in overcoming the challenges of recruiting, retaining and developing talent for the regional economy.

#### **IV. REQUIRED PARTNERS**

Section 121(b)(1)(B) of WIOA identifies the entities that are required partners in the local one-stop delivery systems. The required partners are the entities responsible for administering the following programs and activities in the local area:

<b>Local Partner Organization</b>	<b>WIOA Required Partner Programs</b>
<b>Rogue Workforce Partnership</b> Service Providers are: <ul style="list-style-type: none"> <li>▸ ResCare</li> <li>▸ College Dreams</li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>WIOA Title I - Adults, Dislocated Workers</b></li> <li>▸ <b>WIOA Title I – Youth</b></li> </ul>
<b>Oregon Higher Education Coordinating Commission</b> <i>(pending procurement of local service provider)</i>	<ul style="list-style-type: none"> <li>▸ <b>WIOA Title II - Adult Education and Family Literacy Act (AEFLA)</b> program authorized under <b>title II</b> of WIOA;</li> </ul>
<b>Oregon Employment Department</b>	<ul style="list-style-type: none"> <li>▸ <b>WIOA Title III - Wagner-Peyser Act</b> Employment Service program authorized under the Wagner-Peyser Act (29 U.S.C. 49 et seq.), as amended by WIOA title III;</li> <li>▸ <b>Trade Adjustment Assistance</b> activities authorized under chapter 2 of title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.)</li> <li>▸ <b>Jobs for Veterans</b> State Grants programs authorized under chapter 41 of title 38, of the United States Code</li> <li>▸ Programs authorized under <b>State unemployment compensation laws</b> (in accordance with applicable Federal law);</li> </ul>
<b>Oregon Vocational Rehabilitation</b>	<ul style="list-style-type: none"> <li>▸ <b>WIOA Title IV - Vocational Rehabilitation (VR)</b> program authorized under title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.), as amended by <b>WIOA title IV</b>;</li> </ul>
<b>Oregon Department of Human Services</b>	<ul style="list-style-type: none"> <li>▸ <b>Temporary Assistance for Needy Families (TANF)</b> authorized under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.), unless exempted by the Governor under § 678.405(b).</li> <li>▸ <b>SNAP</b> - Programs authorized under sections 6(d)(4) and 6(o) of the <b>Food and Nutrition Act of 2008</b> (7 U.S.C. 2015)*</li> </ul>
<b>Rogue Community College</b>	<ul style="list-style-type: none"> <li>▸ <b>Career and technical education programs</b> at the postsecondary level authorized under the <b>Carl D. Perkins Career and Technical Education Act of 2006</b> (20 U.S.C. 2301 et seq.);</li> </ul>



Local Partner Organization	WIOA Required Partner Programs
Easter Seals	<ul style="list-style-type: none"> <li>Senior Community Service Employment Program authorized under title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.)</li> </ul>
Job Corp	<ul style="list-style-type: none"> <li>WIOA Title I – Job Corps</li> </ul>
Housing Authority of Jackson County	<ul style="list-style-type: none"> <li>Employment and training activities carried out by the <b>Department of Housing and Urban Development</b></li> </ul>
<i>These programs are not present in the Rogue Valley Region</i>	<ul style="list-style-type: none"> <li>WIOA Title I (Section 167) - National Farmworker Jobs Program (a nationally directed, locally administered program of services for migrant and seasonal farmworker programs)</li> </ul>
	<ul style="list-style-type: none"> <li>WIOA Title I – Native American programs</li> </ul>
	<ul style="list-style-type: none"> <li>Employment and training activities carried out under the <b>Community Services Block Grant</b> (42 U.S.C. 9901 et seq.);</li> </ul>
	<ul style="list-style-type: none"> <li>Programs authorized under sec. 212 of the <b>Second Chance Act</b> of 2007 (42 U.S.C. 17532)</li> </ul>
Local Partner Organization	Additional Partners*
Oregon Commission for the Blind	<ul style="list-style-type: none"> <li>Other appropriate Federal, State, or local programs, including employment, education, and training programs provided by public libraries or in the private sector.</li> </ul>
Southern Oregon Goodwill Industries	
U.S. Veterans Administration	
Southern Oregon University	
Jackson County Library Services	
Josephine Community Libraries	
Others	<ul style="list-style-type: none"> <li>Employment and training programs carried out by the <b>Small Business Administration</b></li> </ul> <p><i>The partners listed have not yet been engaged. One or both may choose to join in this MOU after July 1, 2017.</i></p>
<b>Small Business Development Centers</b> <ul style="list-style-type: none"> <li>Southern Oregon University (Jackson County)</li> <li>Rogue Community College (Josephine County)</li> </ul>	
<i>Placeholder – we'll be checking to determine if any are applicable for our region</i>	<ul style="list-style-type: none"> <li>Employment and training programs administered by the <b>Social Security Administration</b>, including the <b>Ticket to Work and Self-Sufficiency Program</b> established under section 1148 of the Social Security Act (42 U.S.C. 1320b–19)</li> </ul>
	<ul style="list-style-type: none"> <li>Programs carried out under section 112 of the <b>Rehabilitation Act</b> of 1973 (29 U.S.C. 732);</li> </ul>
	<ul style="list-style-type: none"> <li>Programs authorized under the <b>National and Community Service Act</b> of 1990 (42 U.S.C. 12501 et. seq.);</li> </ul>

\*WIOA Section 121(b)(2) provides for these Additional Partners

## V. VISION FOR SUCCESS & GOALS

The parties agree to support the following Vision, Guiding Principles and Goals:

### Vision:

Integrated partners seamlessly incorporating services for the common customers in multiple programs.

- Co-location and integration of one-stop center facilities in Medford and Grants Pass



- Identification, development, and tracking of sector-specific talent pools and priority populations
- Coordinated business services and integrated business outreach
- Communication at all levels
- Clarity around who we are and what we are trying to accomplish. Embrace substance over form.
- Strong Relationships
- Integration and leveraging of services, data intelligence, and resources
- System of outreach and mutual exchange to effectively and efficiently respond to the needs of businesses, prospective career seekers, and current workers

**Guiding Principles:**

- Collaborative Action – Moving forward in an approachable and positive way
- Customer Focused – Recognizing that each person we serve is different and our work is to listen and engage them in reaching their goals
- Compassion – Embracing with curiosity the truth that the customer shares
- Empathetic – Sharing and understanding others’ perspectives
- Accountable – Being responsible to those we serve and the metrics we commit to
- Determined – Recognizing our customers deserve better and, therefore, we must do better

**Strategic Goals:**

- Continue building sector partnerships
- Continue building a customer-centric workforce system that is easy to access, highly effective, and simple to understand
- Invest in Southern Oregonians to build in-demand skills, match training and career seekers to opportunities, and accelerate career momentum
- Create and develop talent by providing prospective career seekers and current workers with information and experiences that engage their interests, spur further career development, and connect them to Oregon employers

**Becoming an Action Learning Community**

Through this MOU, we are formalizing our commitment to be a more intentional professional learning community, focused unswervingly on improving our ability to take more effective action so that we may better serve career-seekers, business employers and our community. Our work together will be an on-going cycle of innovation, prototyping, seeing what works and what doesn’t, taking effective strategies to scale, and continuous improvement.

**We will:**

- Prototype new technology and referral methods, and adapt them - through human-centered design processes – to create the optimal customer experience and benefit.



- Seek to create customized solutions for each individual or groups of individuals with similar needs, and learn our way into how to balance quality assurance standardization with individualization.
- Start with those cost sharing methods that make the most sense, and refine or change them as needed.
- Strive in all our work to question our assumptions, test what we know or don't know, and generate new ways of thinking, acting and evaluating to create the best success possible for our dual customers of career-seekers and business employers.

## **VI. TERM**

Term: The performance under this MOU shall become effective and commence on **July 1, 2017**, and shall terminate on **June 30, 2020**, unless previously terminated or updated pursuant to the terms of this MOU.

Termination: Any party to this agreement may terminate their participation in this MOU upon 60 calendar days' written notice to all other parties to the agreement. In such case, termination by one or more of the parties does not alter the terms or obligations of any other party to the agreement.

Renewal: All parties agree that this MOU shall be reviewed and renewed not less than once every 3-year period to ensure appropriate funding and delivery of services.

## **VII. ROGUE WORKFORCE PARTNERSHIP ROLES & RESPONSIBILITIES**

Per Section § 679.300 of the *WIOA Joint Rule for Unified and Combined State Plans, Performance Accountability, and the One-Stop System Joint Provisions; Final Rule*

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

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

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

In addition, WIOA Section 107 requires RWP to:



- Develop the Local Workforce Plan.
- Conduct Workforce Research and Regional Labor Market analysis.
- Convene, broker, leverage local providers, stakeholders and resources.
- Lead employer engagement to promote business representation, develop linkages, implement effective sector strategies, and ensure workforce investments support the needs of employers.
- Lead efforts to develop and implement Career Pathways.
- Identify and promote proven and promising practices.
- Maximize the use of technology in the provision of services to job seekers and employers.
- Conduct program oversight to ensure appropriate use, management and investment of workforce resources.
- Negotiate local performance measures.
- Negotiate with Chief Elected Official and required partners on the methods for funding the infrastructure costs of one-stop centers.
- Select youth, training and career service providers and the one-stop operator.
- Coordinate activities with education and training providers.
- Develop a budget for the activities of the Local Workforce Board with approval of chief elected official.
- Assess, on an annual basis, the physical and programmatic accessibility of all one-stop centers.
- Certification of one-stop centers

Per WIOA law Sec 107(d)

**(12) BUDGET AND ADMINISTRATION. —**

**(A) BUDGET. —**The local board shall develop a budget for the activities of the local board in the local area, consistent with the local plan and the duties of the local board under this section, subject to the approval of the chief elected official.

**(B) ADMINISTRATION. —**

**(i) GRANT RECIPIENT. —**

**(I) IN GENERAL. —**the chief elected official in a local area shall serve as the local grant recipient for, and shall be liable for any misuse of, the grant funds allocated to the local area under sections 128 and 133, unless the chief elected official reaches an agreement with the Governor for the Governor to act as the local grant recipient and bear such liability.”

**(II) DESIGNATION. —**In order to assist in administration of the grant funds, the chief elected official or the Governor, where the Governor serves as the local grant recipient for a local area, may designate an entity to serve as a local grant subrecipient for such funds or as a local fiscal agent. Such designation shall not relieve the chief elected official or the Governor of the liability for any misuse of grant funds as described in subclause (I).

**(III) DISBURSAL. —**The local grant recipient or an entity designated under subclause (II) shall disburse the grant funds for workforce investment activities at the direction of the local board, pursuant to the requirements of this title. The local grant recipient or



entity designated under subclause (II) shall disburse the funds immediately on receiving such direction from the local board.

In 2015, Jackson and Josephine Counties entered into an Intergovernmental Agreement (IGA) to create the Rogue Valley Workforce Consortium (RVWC) that serves as the chief elected official per WIOA requirements. Per the IGA the and the “Partnership Agreement Between the Rogue Workforce Partnership and the Rogue Valley Workforce Consortium, the RVWC has designated the Rogue Workforce Partnership as the local grant subrecipient and administrative entity/agency to receive the grant funds for the region’s WIOA Title I resources. In addition, RWP coordinates and manages other resources on behalf of State and local partners and pursues additional grant and other resources to address local workforce needs. RWP is committed to investing these resources in support of the WSRV One-Stop delivery system.

In addition to strategic and operational oversight of the region’s workforce development system, RWP also therefore contracts for specific workforce services, funded by WIOA Title IB and other funds that are delivered within the system.

- For Title IB In-School Youth, RWP currently contracts with College Dreams.
- For Title IB Adult, Dislocated Worker and Out-of-School Youth programs, RWP currently contracts with ResCare Workforce Services to provide these services in the WSRV Centers. The ResCare contract was a result of a joint procurement process with the Oregon Department of Human Services in 2015.

#### **VIII. PARTNER ROLES & RESPONSIBILITIES**

- **WIOA Required Partners**

Per Section § 678.420 of the *WIOA Joint Rule for Unified and Combined State Plans, Performance Accountability, and the One-Stop System Joint Provisions; Final Rule*, each required partner must:

(a) **Provide access to its programs or activities through the one-stop delivery system**, in addition to any other appropriate locations;

(b) **Use a portion of funds made available to the partner’s program**, to the extent consistent with the Federal law authorizing the partner’s program and with Federal cost principles in 2 CFR parts 200 and 2900 (requiring, among other things, that costs are allowable, reasonable, necessary, and allocable), to:

(1) **Provide applicable career services**; and

(2) **Work collaboratively with the State and Local WDBs to establish and maintain the one-stop delivery system. This includes jointly funding the one-stop infrastructure** through partner contributions that are based upon:

- (i) A reasonable cost allocation methodology by which infrastructure costs are charged to each partner based on proportionate use and relative benefit received;
- (ii) Federal cost principles; and



(iii) Any local administrative cost requirements in the Federal law authorizing the partner's program. (This is further described in § 678.700.)

(c) Enter into an MOU with the Local WDB relating to the operation of the one-stop delivery system that meets the requirements of § 678.500(b);

(d) Participate in the operation of the one-stop delivery system consistent with the terms of the MOU, requirements of authorizing laws, the Federal cost principles, and all other applicable legal requirements; and

(e) Provide representation on the State and Local WDBs as required and participate in Board committees as needed.

- **WIOA Additional Partners**

WIOA additional partners may choose to partner in any or all of the same roles and responsibilities as required partners, or may choose to partner at other levels agreed upon.

## **IX. PROVIDING ACCESS TO PROGRAMS OR ACTIVITIES THROUGH THE ONE-STOP DELIVERY SYSTEM**

All required and additional partners are committed to providing access to their programs or activities through the WorkSource Rogue Valley (WSRV) one-stop delivery system. Partners are strongly committed to creating the best possible customer experience and overall success for all of the people we collectively serve. We are focused on a human-centered design<sup>3</sup> approach that blends empathy, creativity, maximum leverage of each other's capacities, and maximum efficiency and effectiveness.

All required and additional partners will describe and document the manner in which they will provide access to their programs or activities. This documentation will be captured in Appendix A of this MOU. Working in partnership with the RWP, all partners will update and amend Appendix A if their access modality changes. Amendments to Appendix A will not require new signatures to the MOU, and will be emailed to all partners as they occur.

- **WIOA Required Partners**

For WIOA required partners, access will conform to WIOA standards as articulated under Section XII of this MOU below. Access to programs or activities will be at the highest level possible, within the limitations of each partner's operational capacities and resources.

- **WIOA Additional Partners**

WIOA additional partners have the option of either conforming to these standards, or choosing instead to provide a different level of access.

---

<sup>3</sup> See: <https://www.ideo.org/approach>





## **X. COST SHARING / INFRASTRUCTURE FUNDING AGREEMENT**

### • **WIOA Required Partners**

In accordance with WIOA sec. 121 and implementing regulations, each required partner must use a portion of its funds to support infrastructure, career services and other shared costs of the WSRV One-Stop delivery system. RWP will convene and facilitate required partners to come to an agreement on a methodology for cost sharing and infrastructure funding. This methodology and Cost Sharing / Infrastructure Funding Agreement (IFA) will be described and documented as Appendix B of this MOU.

The Cost Sharing / IFA methodology and spreadsheet will be used, tested and refined over time. Any future changes will be agreed upon by all participating required partners. The Cost Sharing / IFA will identify the specific infrastructure, career services and other shared costs and the method by which those costs will be supported in accordance with WIOA and Federal cost principles, which require that all costs must be allowable, reasonable, necessary, and allocable to the program and all other applicable legal requirements.

Per [WIOA TEGL No. 17-16](#)<sup>4</sup> “Funding provided by the one-stop partners to cover operating costs, including infrastructure costs, of the one-stop delivery system must be based on the partner program’s proportionate use of the system and relative benefit received.” As the local Workforce Development Board, RWP is responsible for managing the Infrastructure Funding Agreement, as well as collecting and disbursing the shared resources outlined within the Agreement.

Updates and amendments to this methodology and Appendix B will be made by required partners as necessary, and through a process of thoughtful deliberation, negotiation and mutual agreement that will be convened and facilitated by the RWP as needed.

Amendments to Appendix B will not require modification or new signatures to this MOU. Required partners will be able to signify their affirmation to any agreed upon methodology changes via the following methods:

- Signature on a signatory page of the updated Appendix B Cost Sharing / Infrastructure Sharing Agreement
- An Email affirmation as to their agreement
- Any other method agreed to by the RWP and partners

### • **WIOA Additional Partners**

WIOA additional partners have the option of either participating in the Cost Sharing / Infrastructure Funding Agreement, or choosing to not participate.

---

<sup>4</sup> See Training & Employment Guidance Letter WIOA No. 17-16 [https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)





## **XI. LOCATIONS**

RWP has identified the following locations as the WSRV centers for the local workforce development area:

### *Comprehensive American Job Center*

WorkSource Rogue Valley  
1569 NE "F" Street  
Grants Pass, OR 97526

### *Affiliate American Job Centers*

Our priority goal is to co-locate and merge these two sites into a single Comprehensive Center as soon as possible.

WorkSource Rogue Valley  
35 S. Bartlett Street  
Medford, OR 97501

WorkSource Rogue Valley  
119 N. Oakdale Avenue  
Medford, OR 97501

## **XII. SERVICE DELIVERY**

The WSRV system has been established by RWP in accordance with WIOA, the State Workforce Plan and the Local Workforce Plan. WIOA Section 121 (b)(1)(B) identifies the programs, services and related activities that must be provided through the WSRV delivery system. The State Workforce Plan and Local Workforce Plan further identify workforce programs that must be accessible through the WSRV One-Stop delivery system.

The WorkSource Oregon Operational Standards (See Attachment 2: WorkSource Operational Standards) describe the content and services to be available at all WorkSource Oregon Centers and serves as the framework for service delivery in the WSRV service delivery model. Partners anticipate that these statewide Operational Standards will be updated and expanded upon in the future to incorporate all required WIOA partners.

### **Comprehensive American Job Centers**

A comprehensive American Job Center, as described in 20 CFR 678.305, 34 CFR 361.305, and 34 CFR 463.305, is a physical location where job seekers and employer customers can access the programs, services, and activities of all required one-stop partners, along with any additional partners.

Comprehensive American Job Centers must have:

1. At least one WIOA title I staff person physically present, and the Center must provide the career services listed in 20 CFR 678.430, 34 CFR 361.430, and 34 CFR 463.430;
2. Access to training services described in 20 CFR 680.200;
3. Access to any employment and training activities carried out under section 134(d) of WIOA;



4. Access to programs and activities carried out by one-stop partners listed in 20 CFR 678.400 through 678.410, 34 CFR 361.400 through 361.410, and 34 CFR 463.400 through 463.410, including the Wagner Peyser Act ES program; and
5. Workforce and labor market information.

Per TEGL 16-16, Centers not open outside of the regular business hours should have a plan for how they will provide services to individuals who cannot visit a center during regular business hours.

Career services at a Comprehensive Job Center does not mean that each required partner must provide these services directly on-site at Center. There are three options:

1. Having a program staff member physically present at the American Job Center;
2. Having a staff member from a different partner program physically present at the Center and appropriately trained to provide information to customers about the programs, services, and activities available through all partner programs; or
3. Making available a direct linkage through technology to a program staff member who can provide meaningful information or services. (As described in 20 CFR 678.305(d)(3), 34 CFR 361.305(d)(3), and 34 CFR 463.305(d)(3), a “direct linkage” means providing a direct connection at the American Job Center within a reasonable time, by phone or through a real-time web-based communication, to a program staff member who can provide program information or services, including career services, to the customer. Solely providing a phone number, website, information, pamphlets, or materials does not constitute a “direct linkage.”)

Note: According to TEGL 16-16, for option 2, it is essential that the staff person providing information about a partner program document their time and effort to ensure that they allocate time to the appropriate program since salaries and wages are based on records, that accurately reflect the work performed consistent with Federal cost principles in the Uniform Guidance at 2 CFR 200.430.

### **Affiliate American Job Centers**

Affiliate American Job Centers are created to supplement and enhance customer access to Center services. As described in 20 CFR 678.310, 34 CFR 361.310, and 34 CR 463.310, affiliated sites allow for more flexibility of the services one-stop partner programs provide. Just as is required of comprehensive American Job Centers, affiliated sites must be physically and programmatically accessible to individuals with disabilities, as required by section 188 of WIOA and its implementing regulations at 29 CFR part 38. The frequency of program staff’s physical presence in an affiliated site will be determined through partner MOU negotiations.

### **XIII. ONE STOP OPERATOR SELECTION, ROLE & RESPONSIBILITIES**

A One-Stop Operator for the region will be selected through a competitive process, per WIOA Section 121(d) and Subpart D, § 678.600 to § 678.635 of *WIOA Joint Rule for Unified and Combined State Plans, Performance Accountability, and the One-Stop System Joint Provisions; Final Rule*. WIOA requires that a



Local Workforce Development Board select or designate a One-Stop Operator through a competitive process at least once every 4 years, or it may choose to implement, a competitive selection process more than once every 4 years.

Working within WIOA requirements, the RWP has determined that role of the one-stop operator will be to:

- Coordinate the service delivery of required one-stop partners and service providers
- Coordinate service providers across the one-stop delivery system
- May be a primary provider of services within the center or providing some of the services within the center
- Coordinate service delivery in our multi-center area, which currently includes 1 comprehensive one-stop center and 2 affiliate centers (*2 comprehensive one-stop centers in the near future*)

Partners will be kept updated and informed about the One-Stop Operator and its work as WIOA implementation progresses and more details emerge.

#### **XIV. OREGON EMPLOYMENT DEPARTMENT PROGRAMS, SERVICES AND ACCESS**

The Oregon Employment Department (OED) is committed to delivering services through the WSRV system in accordance with WIOA, the State Plan, the Local Workforce Plan and the WorkSource Oregon Operational Standards. The OED programs covered by this commitment and MOU include:

- WIOA Title III – Wagner-Peyser
- Unemployment Insurance
- Veterans Programs
- Trade Adjustment Assistance

OED is committed to creating a seamless, integrated service-delivery system. OED, in partnership with RWP and other partners, will continue to engage in streamlining practices and cost efficiencies, including continuing to partner to create more effective program integration models that generate ever-improving results for our shared participants.

#### **XV. OREGON DEPARTMENT OF HUMAN SERVICES PROGRAMS, SERVICES AND ACCESS**

The Department of Human Services (DHS) is committed to delivering exploratory, basic and individualized career services, case management, support services and training services through the WSRV system in accordance with WIOA, the State Plan, the Local Workforce Plan and the WorkSource Oregon Operational Standards. The DHS workforce programs covered by this commitment and MOU include:

- **Self Sufficiency**
  - TANF - JOBS
  - SNAP OFSET



- SNAP 50/50

In addition, while not subject to cost sharing requirements, the Employment Related Day Care program will be part of the broad array of supportive services available to eligible customers to assist them to achieve higher levels of self-sufficiency.

DHS Self-Sufficiency is committed to creating a seamless, integrated service-delivery system that blends Self-Sufficiency income support benefits, support services, and case management with the seamless array of basic, career services, and training resources provided through the one-stop centers.

DHS, in partnership with RWP and other partners, will continue to engage in streamlining practices and cost efficiencies, including:

- Consolidating joint procurement of TANF-JOBS program service providers and the Local Workforce Development Board procurement for the Title I – Adult, Dislocated Worker, and Out of School Youth service provider
  - Continuing to partner to create more effective program integration models that generate ever-improving results for our shared participants.
- **Vocational Rehabilitation**  
Vocational Rehabilitation is committed to creating a seamless, integrated service delivery system that blends support services, case management with the seamless array of basic, career services, and training resources provided through the one-stop centers.

## **XVI. ADULT BASIC EDUCATION SERVICES - TITLE II**

The State of Oregon's Higher Education Coordinating Council (HECC) is the agency responsible for administering Adult Basic Education – Title II services. Rogue Community College is the contracted provider in the Rogue Valley. HECC is committed to delivering Adult Basic Education services through the WSRV centers and system.

## **XVII. ROGUE COMMUNITY COLLEGE – PERKINS CTE**

Rogue Community College provides Career and Technical Education programs at the postsecondary level authorized under the Carl D. Perkins Career and Technical Education Act of 2006 (20 U.S.C. 2301 et seq.).

## **XVIII. EASTER SEALS**

Easter Seals is the service provider for the:

- Senior Community Service Employment Program authorized under title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.).
- Homeless Veterans Reintegration Program



**XIX. HOUSING AUTHORITY OF JACKSON COUNTY**

The Housing Authority of Jackson County provides employment and training activities carried out through programs funded by the U.S. Department of Housing and Urban Development.

**XX. JOB CORPS**

Job Corp is an education and training program that helps young people learn a career, earn a high school diploma or GED, and find and keep a good job. For eligible young people at least 16 years of age that qualify as low income, Job Corps provides the all-around skills needed to succeed in a career and in life.

**XXI. SOUTHERN OREGON GOODWILL INDUSTRIES**

SOGI provides Adult Basic Skills and workforce services. SOGI is committed to delivering Adult Basic Skills services through the WSRV system. They have been key contributing partners in the region's Adult Basic Skills Work Group that is focused on creating a seamless system of services for customers.

**XXII. OTHER PARTNERS**

Other additional partners will be added to this MOU after the initial July 1, 2017 commencement date as they are engaged and/or become interested in participating anytime during the term of this MOU. The addition of any new partners will not require a re-signatory process by all the previous partners. New partners will be added as new signatories in a stackable/cumulative manner. All partners will be notified of any new additional partners joining the MOU.

**XXIII. DATA SHARING & CUSTOMER TRACKING**

WSRV is a shared system that promotes the alignment and integration of programs and services to better serve common regional customers. Sharing customer service-level data between partner organizations is essential to seamless customer service and to achieving the vision and promise of the WSRV system. All WSRV partners commit to developing a data sharing agreement that promotes customer service and advances the goal of delivering a seamless, customer focused WSRV system. The WorkSource Oregon Management Information System (WOMIS) will be used to register and enroll all customers in WSRV.

The parties agree to comply with provisions of WIOA, the Wagner-Peyser Act, the Rehabilitation Act of 1973, and the Adult Education and Literacy Act, and any other applicable requirements of state or federal law, to ensure that customer information shall be shared solely for the purpose of enrollment, referral, or provisions of services, When required under applicable state or federal law, a release of information will be obtained from the customer before sharing confidential protected information. In carrying out their respective responsibilities, each party shall respect and abide by the confidentiality policies, procedures, and guidance of the other parties.



#### **XXIV. PERFORMANCE REPORTING**

As applicable, appropriate and required under WIOA, each partner will provide performance information related to all services and programs it provides through the WSRV system, including, but not limited to:

- Demographic breakdown of participants (gender, age, race) by program
- Total number served by Center and program
- Total number placed in jobs by program
- Starting wages
- Employment in the 2<sup>nd</sup> quarter following exit from program services
- Employment in the 4<sup>th</sup> quarter following exit from program services
- Median Earnings 2<sup>nd</sup> quarter following exit from program services
- Effectiveness in Serving Employers – TBD

In instances in which a program partner does not and/or is not required to track a specific data element, flexibility will be exercised with regard to these reporting requirements.

WSRV services are comprehensive and performance-based. Performance information will be collected and evaluated on a quarterly basis, reviewed by the Local Leadership Team, and shared with the local RWP Workforce Development Board. With the Program Year beginning annually on July 1<sup>st</sup>, quarterly reports should be made available within the 45 days after quarter end.

In addition to these “lagging” performance indicators, the RWP is spearheading an effort with partners to develop a performance “dashboard,” and is seeking to also identify “leading” performance indicators to create a comprehensive set of Key Performance Indicators (KPI). Partners will work together to report on these mutually agreed upon KPI’s as they have capacity to do so.

#### **XXV. TECHNOLOGY**

##### **Integrated Data System**

WIOA 20 CFR 679.560 (20) requires that the local plan must include a description of:

- (20) How one-stop centers are implementing and transitioning to an integrated, technology-enabled intake and case management information system for programs carried out under WIOA and by one-stop partners

To meet this requirement of WIOA, RWP and local partners will need to work collaboratively at the state-level with state agency partners and other Local Workforce Development Boards to create such a statewide integrated system.

In the interim, RWP will convene local partners to develop strategies to maximize the effectiveness of WSRV by facilitating the connections among the data systems used by WSRV partners.



### **Other Technology Support in the WSRV One-Stop Centers & Delivery System**

- RWP, OED and local partners will create solutions to better serve WSRV customers through the use of technology.
- RWP and OED will coordinate the design, purchase and maintenance of all publicly-facing WSRV networks, computers and printers. These costs will be considered part of the shared infrastructure costs of the WSRV system
- Labor Exchange System – WSRV partners will use a shared Labor Exchange System (i.e., iMatchSkills and/or a new statewide labor exchange system). This system will be a single repository for all employer files, job listings and outcomes and be a primary tool for our integrated business services.
- RWP will provide the platform and WSRV partners will maintain the local customer access website for WorkSource Rogue Valley at <http://worksourcerogue.org/>. These costs will be considered part of the shared infrastructure costs of the WSRV system.

### **XXVI. REFERRALS**

The partners agree to develop a referral process to aid in the integration and alignment of services within the WSRV System. The referral process must help create a more seamless customer experience by providing convenience of services to individuals and businesses. This process also provides for a continuum of services and follow-up to ensure WSRV's customer needs have been met.

- Ensure that intake and referral processes are customer-centered and provided by staff trained in customer service
- Ensure that general information regarding one-stop center programs, services, activities and resources shall be made available to all customers as appropriate.
- Ensure that all partners will provide a direct link /access to partner program with meaningful information of partner service through cross training, co-location or through real-time technology.

All customer facing staff will receive cross-training of partner programs, and have the knowledge and ability to perform seamless referrals between partner programs, striving for a warm hand-off process between programs.

### **XXVII. COMMON BRANDING**

WSRV is a shared system and the common one-stop delivery brand is WorkSource Rogue Valley. All services, signage, print publications, digital publications and other informational and on-line materials will be branded in accordance with the WorkSource Oregon Style Guide. For an overview, see <https://prezi.com/jl4oto1lkno/wso-branding-style-guide/>. A current copy of the style guide can be obtained through the RWP or OED.



In addition to being part of the statewide WorkSource Oregon network for one-stop centers and brand, WSRV is also a proud partner in the American Job Network and national brand created by the United States Department of Labor. For more information, see <https://www.dol.gov/aic/>

#### **XXVIII. ASSURANCES FOR INCREASED AND MAXIMIZED ACCESS**

WSRV is designed to be universally accessible, customer-centered and offer training and related resources that are driven by the needs of the local economy. WSRV must be responsive to all job seekers, but especially low-income and other underserved residents, including those receiving public assistance, those with disabilities, individuals who are basic skills deficient, and communities of color. This integrated team approach promotes partnership, maximizes resources, aligns efforts and improves results.

Through this MOU, WSRV partners commit to working together to focus efforts and resources to ensure the needs of job seekers and workers with barriers to employment are effectively addressed in the WSRV system. This necessitates that we work together to prioritize services and increase outreach to individuals with barriers to employment, a group that includes members of the following populations:

- Displaced homemakers
- Low-income individuals and families
- Individuals age 55 and older
- Indians, Alaska Natives, and Native Hawaiians
- Returning citizens (ex-offenders)
- Homeless individuals
- Youth who are in or have aged out of the foster care system
- English language learners, a group that is also often referred to as individuals with Limited English Proficiency (LEP)
- Individuals who have low levels of literacy
- Individuals facing substantial cultural barriers
- Eligible migrant and seasonal farmworkers
- Single parents, including single pregnant women
- Long-term unemployed individuals
- Individuals within two years of exhausting lifetime eligibility under part A of title IV of the Social Security Act
- Individuals with disabilities that need assistance with employment
- Veterans and Veterans Spouses
- Disabled Veterans

To achieve the priority of increased access for individuals with needing assistance with barriers to employment, the parties will:

- Leverage the expert knowledge of its membership and collaborate to maximize access to workforce services;





- Conduct outreach to stakeholders and other organizations within the Region; and
- Actively reach out to underserved populations in Jackson and Josephine Counties

**XXIX. EQUAL OPPORTUNITY**

The parties agree to obey all applicable state and federal nondiscrimination laws. The parties shall not unlawfully discriminate against any customer, applicant for employment, or employee of a party to this MOU or other entity. The parties shall adhere to the policies, procedures, and guidance issued by State partner agencies and RWP regarding equal opportunity, nondiscrimination, and increased accessibility. Nothing in this Section shall be construed as limiting the parties' agreement to increase and maximize access for individuals with barriers to employment under Section XVII of this MOU.

**XXX. DISPUTES**

If disputes arise related to the terms of this MOU, the parties agree to abide by RWP's Mediation/Conflict Resolution Process (to be developed during FY2017). Should such process fail to resolve the dispute, the parties agree to seek assistance and support to resolve the dispute from the Governor's Office, appropriate State agencies, and the Oregon Workforce Investment Board, as appropriate.

**XXXI. MODIFICATIONS AND AMENDMENTS**

This MOU may be modified, revised, or amended by mutual written consent of all the signatory Parties. A written request must be submitted to the named parties. The modification shall not be effective unless agreed to in writing by all Parties in an Amendment to this MOU, properly executed and approved in accordance with applicable Oregon State law, and State Fiscal Rules.

**XXXII. SIGNATURES**

*Rick Dyer*

08/17/2017

Rick Dyer  
County Commissioner  
Jackson County Board of Commissioners

*Dan DeYoung*

08/21/2017

Dan DeYoung  
County Commissioner  
Josephine County Board of Commissioners

*Jessica Gomez*

08/18/2017

Jessica Gomez  
Chair, Rogue Workforce Partnership  
CEO & Founder, Rogue Valley Microdevices

*James Pfarrer*

08/18/2017

Jim Pfarrer  
Division Director Workforce Operations  
Oregon Employment Department



*Rosemary Jernigan* 08/18/2017  
\_\_\_\_\_  
Rosemary Jernigan Date  
Assistant Self Sufficiency Program Manager  
Oregon Department of Human Services

*Matthew R. Balkwill* 08/18/2017  
\_\_\_\_\_  
Matthew R. Balkwill, Branch Manager Date  
Oregon Vocational Rehabilitation

\_\_\_\_\_  
Holley Oglesby Date  
Deputy Procurement Officer  
Higher Education Coordinating Commission

*Curtis Sommerfeld* 08/18/2017  
\_\_\_\_\_  
Curtis Sommerfeld Date  
Vice President of College Services  
Rogue Community College – Perkins CTE

*Catherine Todd* 08/18/2017  
\_\_\_\_\_  
Catherine Todd Date  
Director of Workforce Solutions  
Easter Seals Oregon

*Rich Nannini* 08/16/2017  
\_\_\_\_\_  
Rich Nannini Date  
Project Director  
DESI/Job Corp

*Jason Elzy* 08/15/2017  
\_\_\_\_\_  
Jason Elzy Date  
Executive Director  
Housing Authority of Jackson County

*David Johnson* 08/18/2017  
\_\_\_\_\_  
[Name] Date  
08/18/2017  
Oregon Commission for the Blind

\_\_\_\_\_  
[Name] Date

\_\_\_\_\_  
[Name] Date

\_\_\_\_\_  
[Name] Date

\_\_\_\_\_  
[Name] Date

\_\_\_\_\_  
[Name] Date

\_\_\_\_\_  
[Name] Date

**PARTNER NAME:** HOUSING AUTHORITY OF JACKSON COUNTY

Date:

**WSRV LOCATION:** Medford Bartlett Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs	Housing Choice Voucher holders enter into the Family Self-Sufficiency (FSS) program to set goals for attaining suitable employment. Work force partners are identified as appropriate.	3. FSS clients will be directly linked to services by either direct phone call or by escorting them over to the One Stop center for introduction to services.		
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	No current direct linkage. Information shared about WSRV resources.	3. FSS clients will be formally introduced to staff at One Stop Center to ensure a direct transfer of resources for their goals.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	Assessment of needs and goals are determined for the FSS program participants' goals. Currently referred to WSRV for career assessment if needed.	3. FSS clients will be directly referred to One Stop Center for any initial assessment.		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	No current exchange of services. All services are delivered only to FSS clients.	3. A WSRV representative could sit on our FSS advisory board to allow preference selection into the FSS program if client has a Housing Choice Voucher.		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Family Self-Sufficiency clients are referred to Workforce partners.	3. FSS clients will be more directly linked to services by either a phone call or by escorting them over to the One Stop center for introduction to services.		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	NA	NA		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	NA	NA		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Information of services and resources given to FSS clients.	3. Information of services and resources given to FSS clients.		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Assist FSS clients as needed	3. Assist FSS clients as needed.		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Information done by referral	3. Information done by referral.		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	FSS clients are referred to WSRV and other appropriate agencies for diagnostic testing. In depth interviewing conducted by FSS Coordinator and by referral.	3. FSS clients will be directly linked to the One Stop center for comprehensive assessment.	3	
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Conducted by FSS Coordinator	3. Conducted by FSS Coordinator, but can be done in collaboration with One Stop Center		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Conducted by FSS Coordinator	3. Conducted by FSS Coordinator, but can be done in collaboration with One Stop Center		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
Internships/Work Experiences	Linked to careers	NA	3. FSS clients directly linked to services.		
Financial Literacy Services	Youth - to help achieve long term financial stability.	NA	NA		
Relocation Support	Out-of-area job search assistance and relocation assistance.	NA	NA		
ESL	English language acquisition and integrated education and training programs.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
Skill Validation		Referral to appropriate agencies			
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	FSS clients sign a 5 year Contract of Participation	FSS clients sign a 5 year Contract of Participation		
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	Referral to appropriate agencies	3. FSS clients directly linked to services.		
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Partnerships have been established	3. Partnerships more closely defined		
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	NA	3. Direct linkage for services		
Customized Recruitments	Customized recruitment events including targeted job fairs.	NA	3. May participate as appropriate		
Customized LMI	For specific employers, sectors, industries or clusters.	NA	NA		
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a a closure or layoff or natural or other disaster which results in mass job loss.	NA	NA		
Tax Credits	Assistance in accessing tax credits	NA	NA		
Outreach Services	To promote the benefits of working with the WSRV system.	Outreach done with FSS participants	3. Promotion of FSS program to other WSRV clients		
OTHER SERVICES (Describe)					
*Delivery Method:					

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
<b>WIOA required partners must provide access to its programs and activities at the One-Stop Centers. This does not mean that each required partner must provide these services directly on-site at Center. There are three options:</b>					
<b>1. Having a program staff member physically present at the American Job Center</b>					
<b>2. Having a staff member from a different partner program physically present at the Center and appropriately trained to provide information to customers about the programs, services, &amp; activities available through all partner programs</b> Note: According to TEGL 16-16, for option 2, it is essential that the staff person providing information about a partner program document their time and effort to ensure that they allocate time to the appropriate program since salaries and wages are based on records, that accurately reflect the work performed consistent with Federal cost principles in the Uniform Guidance at 2 CFR 200.430.					
<b>3. Making available a direct linkage through technology to a program staff member who can provide meaningful information or services.</b> (As described in 20 CFR 678.305(d)(3), 34 CFR 361.305(d)(3), and 34 CFR 463.305(d)(3), a "direct linkage" means providing a direct connection at the American Job Center within a reasonable time, by phone or through a real-time web-based communication, to a program staff member who can provide program information or services, including career services, to the customer. Solely providing a phone number, website, information, pamphlets, or materials does not constitute a "direct linkage.")					

**PARTNER NAME:** **EASTER SEALS OREGON - Senior Community Service Employment Program**

Date:

**WSRV LOCATION:** **Medford Bartlett   Medford Oakdale   Grants Pass**

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs	We only do eligibility for our specific programs (SCSEP & HVRP)			
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	We only do outreach & orientation for our specific programs (SCSEP & HVRP). We require all of our clients to enroll into the WorkSource system			
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	We require our clients to participate in the WorkSource & WIOA assessments & NCRC			
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	We do provide these services in collaboration with the WorkSource system			
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	We make referrals			
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for	We do provide these services in collaboration with the WorkSource system			
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	N/A			
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Referral			
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Referral			
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Referral			
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	We do provide these services in collaboration with the WorkSource system			
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	We do provide these services in collaboration with the WorkSource system			
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	We do provide these services in collaboration with the WorkSource system			
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	We do provide these services in collaboration with the WorkSource system			
Internships/Work Experiences	Linked to careers	We do provide these services in collaboration with the WorkSource system			
Financial Literacy Services	Youth - to help achieve long term financial stability.	N/A			
Relocation Support	Out-of-area job search assistance and relocation assistance.	N/A (we could transfer our clients to another County were we provide the SCSEP or HVRP but we don't pay for relocation)			
ESL	English language acquisition and integrated education and training programs.	Referral			
Skill Validation		We use the NCRC or another provider			
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	We provide 12 month follow-up in SCSEP & 9 month in HVRP			
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Referral			
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	We do have the ability to pay for On-the-Job 2 to 4 weeks @prevailing wage			
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	Referral			
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	N/A			
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Referral			
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	Referral			
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.				
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	We do provide this service			
Customized Recruitments	Customized recruitment events including targeted job fairs.	We do provide this service			
Customized LMI	For specific employers, sectors, industries or clusters.				
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a a closure or layoff or natural or other disaster which results in mass job loss.	N/A			
Tax Credits	Assistance in accessing tax credits	Referral			
Outreach Services	To promote the benefits of working with the WSRV system.	We always promote WSRV services			
OTHER SERVICES (Describe)					
*Delivery Method:					

WIOA required partners must provide access to its programs and activities at the One-Stop Centers. This does not mean that each required partner must provide these services directly on-site at Center. There are three options:

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
<b>1. Having a program staff member physically present at the American Job Center</b>					
<b>2. Having a staff member from a different partner program physically present at the Center and appropriately trained to provide information to customers about the programs, services, &amp; activities available through all partner programs</b> Note: According to TEGL 16-16, for option 2, it is essential that the staff person providing information about a partner program document their time and effort to ensure that they allocate time to the appropriate program since salaries and wages are based on records, that accurately reflect the work performed consistent with Federal cost principles in the Uniform Guidance at 2 CFR 200.430.					
<b>3. Making available a <u>direct linkage through technology</u> to a program staff member who can provide meaningful information or services.</b> (As described in 20 CFR 678.305(d)(3), 34 CFR 361.305(d)(3), and 34 CFR 463.305(d)(3), a "direct linkage" means providing a direct connection at the American Job Center within a reasonable time, by phone or through a real-time web-based communication, to a program staff member who can provide program information or services, including career services, to the customer. Solely providing a phone number, website, information, pamphlets, or materials does not constitute a "direct linkage.")					

PARTNER NAME: JOB CORPS

Date:

WSRV LOCATION: Medford Bartlett Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs				
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	Admissions staff present for on-site program orientations and interviews. Public awareness of WSRV services promoted verbally and via handouts within orientations. Job Corps information segment included in WSRV orientations to public. Ongoing community outreach with partner organizations, schools, and events. Inform ineligible or undecided applicants regarding WSRV partner services and options.	Available for brief-segment live participation in existing WSRV orientations for general public. Available to participate in strategic co-promotional orientations with service partners. Inclusion in updates/notifications and/or any related training on WSRV services available. Inclusion of Job Corps orientations in worksource event calendars, signs, electronic marquees, etc.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	In-person or by phone, with or without appointment. Is introduced and started during local admissions process, with comprehensive application at training centers. Employability-readiness re-assessed at start of post-center local career transition phase.			
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	In-person, via e-communications, or by phone. Introduced during orientation and application process. Students register with worksource system during later career transition preparation process at training centers. Individualized focus on related job search coaching and education provided to all program completers and former students.	Continue to increase number and specificity of mutual referrals. Ensure that all youth partners and youth ages 16-24 are aware of and including Job Corps among presented alternatives to college for qualifying low-income youth, as well as a performance and retention-supporting preparatory route for college, apprenticeship, and military service.		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Mutual referrals are made among partners. Referral to WSRV services are made to walk-ins and information session participants, including applicants and community members in general.	Regularly updated awareness of services supports increased specificity of referrals, warming up hand-offs and and furthering knowledgeable mutual promotion of partner services.		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Introduced at orientation/information session during admissions process. Continued focus during pre-separation process at training centers. Individual assistance available to all program completers and former students during career transition phase. Use existing online workforce resources.	Using existing online resources, promote improved understanding of connections between skills, experience, education and job requirements to help improve individualized career development with planned progression through area partner services. Enhance general understanding of Job Corps as being one of a series of steps leading to career/education goals.		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.		Enhance general understanding of Job Corps as being one of a series of steps leading to career/education goals.		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Is part of in-person program eligibility assessment during admissions with or without appointment, as well as employment readiness assessment during career transition phase.	Continue to increase number and specificity of mutual referrals.		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Refer if requested to State of Oregon information available online or by phone.	Participation in any related education for staff members.		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Guide to and offer assistance with definitive online resources or local agencies providing screening and/or applications. Refer, as needed and by area, to college and/or apprenticeship admissions representatives.	Continue to increase number and specificity of mutual referrals.		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	Interviewing to identify barriers occurs on an ongoing basis during admissions and again during career transition. Diagnostic-level testing administered at training centers or addressed by specialized community referral source.			
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Begins via interview during admissions and is continued during post-center career transition year in support of prioritized assistance and planning for continued career development both during and after career transition year.			
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Begins at initial contact with Job Corps office. Continues via interview during admissions as well as during post-center career transition phase, based on evolving Individual Employment Plan.			
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Begins at initial in person or phone contact with Job Corps office providing opportunity for general introductory interview and coaching on youth options, personal/professional presentation, communication expectations, and follow-through steps. Continues during orientation/interview/admissions process. Learning skills, employability skills, workplace soft skills, and general life skills are specifically emphasized in addition to job skills at training center. Interaction during post-center career transition phase regularly refers back to and continues to support and coach on this skill set as needed.			
Internships/Work Experiences	Linked to careers				
Financial Literacy Services	Youth - to help achieve long term financial stability.		Continue to increase number and specificity of mutual referrals.		
Relocation Support	Out-of-area job search assistance and relocation assistance.	Graduates that relocate during their follow-up service year are assisted with out of area job search and referrals to target area worksource office and other community resources as relevant, and can be re-assigned to a nearby Job Corps career transition office.			
ESL	English language acquisition and integrated education and training programs.	Needs indicated at any stage of program addressed by direct assistance if on center and by identifying appropriate online information, tutoring, and/or referrals to educational options if in local post-center phase.	Continue to increase number and specificity of mutual referrals.		
Skill Validation		Testing at training centers validates set of required skills for completion of each trade offered. During pre-separation and/or post training, graduates are referred to worksource registration. Imatchskills as well as NCRC as part of recommended employability-enhancing actions			

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	Follow-up is provided to students during training center enrollment via mail, e-communications, as well as center visits. Follow-up is provided post-training in person, by phone, or e-communications for effective job search and related services and referrals, as well as post-placement to obtain updates and continue to provide relevant assistance supporting placement retention and continued advancement/planning.	Enhanced awareness of Job Corps' purpose and scope of services amongst current partners supports increased mutual referrals and service coordination.		
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Refer to resources as well as community college programs.	Continue to increase number and specificity of mutual referrals.		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	For former enrollees with abbreviated service periods, help generate relevant OJT possibilities and/or refer to WSRV.			
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	Refer to resources as well as community college contacts.			
Current Worker Training	Training provided to currently employed workers to advance or retain employment.				
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Provided at training centers. Post training, can refer interested and qualified candidates to area employer-will-train opportunities.			
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.				
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Partner with employers, employer-agencies seeking screening and referral of qualified applicants. Create targeted summaries for opportunities shared by employers to circulate within area Job Corps network and beyond.	Continue to increase number and specificity of mutual referrals.		
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	Ongoing referrals of qualified participants nearing end of training or having recently completed training are made to employers, employer-agencies, community colleges, and apprenticeship programs. Create targeted job opening summaries for opportunities shared by employers to circulate within area Job Corps network and beyond.	Assist with same to help build applicant pools for immediate-need opportunities recruited by WSRV.		
Customized Recruitments	Customized recruitment events including targeted job fairs.	Promote program to future applicants at area high school and other agencies upon request. Participate in relevant job fairs to promote Job Corps to new applicants and familiarize potential employers with Job Corps-trained applicant qualifications.	Increased communication regarding openings supports effective routing of trained graduates to areas of greatest need.		
Customized LMI	For specific employers, sectors, industries or clusters.	LMI Resources are shared with the general public during admissions and career transition phases. Customized LMI can be provided as needed for applicants deciding on training or to graduates seeking support for target jobs or career planning.	Involvement in any related training for staff.		
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a closure or layoff or natural or other disaster which results in mass job loss.	Ability to assist via routing notifications of openings to Job Corps network (as noted under screening and referrals).	Inclusion in event notification; increased ability to assist.		
Tax Credits	Assistance in accessing tax credits				
Outreach Services	To promote the benefits of working with the WSRV system.	Benefits of working with WSRV system promoted at all information sessions and with all program graduates at outset of career transition period.	Inclusion in event/promotional materials notification; increased ability to promote.		
OTHER SERVICES (Describe)					
*Delivery Method:					
WIOA required partners must provide access to its programs and activities at the One-Stop Centers. This does not mean that each required partner must provide these services directly on-site at Center. There are three options:					
1. Having a program staff member physically present at the American Job Center					
2. Having a staff member from a different partner program physically present at the Center and appropriately trained to provide information to customers about the programs, services, & activities available through all partner programs Note: According to TEGL 16-16, for option 2, it is essential that the staff person providing information about a partner program document their time and effort to ensure that they allocate time to the appropriate program since salaries and wages are based on records, that accurately reflect the work performed consistent with Federal cost principles in the Uniform Guidance at 2 CFR 200.430.					
3. Making available a direct linkage through technology to a program staff member who can provide meaningful information or services.					
(As described in 20 CFR 678.305(d)(3), 34 CFR 361.305(d)(3), and 34 CFR 463.305(d)(3), a "direct linkage" means providing a direct connection at the American Job Center within a reasonable time, by phone or through a real-time web-based communication, to a program staff member who can provide program information or services, including career services, to the customer. Solely providing a phone number, website, information, pamphlets, or materials does not constitute a "direct linkage.")					



PARTNER NAME:

Date:

WSRV LOCATION:

Medford Bartlett   Medford Oakdale   Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs				Title I - shared
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.				
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.				
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment				
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Referrals to WIOA and internal partners for help with job search and training.	4. Referral Future - integrated with our course and study options		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Required RCC program and Course level activities; college Career Awareness courses; Industry tours and presentation; CIS information system.	4. Referral Future - enhance and expand roll of RCC Career Center and/or refer to additional services that are offered at our partner locations.		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	Referral Guide, Program/Degree guides.	4. Referral		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Referral Guide	4. Referral		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.				
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	TRIO and other RCC FAFSA workshops.	4. Referral Future - can hold workshops at partner location		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	RCC Orientation and Advising	4. Referral Future - can hold orientations at partner locations		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	RCC Orientation and Advising	4. Referral Future - RCC CTE Faculty/advisor available at partner locations		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Required RCC program and Course level activities; college Career Awareness courses; Industry tours and presentation; additional coursework (ie Speech, Interpersonal Comm, etc)..	4. Referral Future - can hold workshops at partner location		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Required RCC program and Course level activities; college Career Awareness courses; Industry tours and presentation; additional coursework (ie Speech, Interpersonal Comm, etc)..	4. Referral Future - can hold workshops at partner location		
Internships/Work Experiences	Linked to careers	RCC CWE and/or internship program requirements (all CTE programs require a work-site placement and/or capstone activity.)			
Financial Literacy Services	Youth - to help achieve long term financial stability.	SALT Money Management Online Tools	4. Referral		
Relocation Support	Out-of-area job search assistance and relocation assistance.				
ESL	English language acquisition and integrated education and training programs.	Student access to RCC ELA classes, EL Civics, VESL (early childhood education)	4. Referral - can pilot or extend contextualized instruction into courses and/or CWE		
Skill Validation		Technical Skill Assessment (required by Perkins Program of Study)			
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.				
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Referral and/or prerequisite requirements in RCC ABS, GED and ELA classes and guided study labs, direct instruction, tutoring and online tools	4. Referral		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.				
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.				
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	Provided in conjunction with RCC Continuing Education department on an as requested basis by local employers	4. Referral		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.				
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.				
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Local Advisory and Business Leadership teams (ie SOREDI, Worksource leadership team, etc).			
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.				
Customized Recruitments	Customized recruitment events including targeted job fairs.				
Customized LMI	For specific employers, sectors, industries or clusters.				
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a a closure or layoff or natural or other disaster which results in mass job loss.				
Tax Credits	Assistance in accessing tax credits				
Outreach Services	To promote the benefits of working with the WSRV system.				
OTHER SERVICES (Describe)					

\*Delivery Method:

1) Co-location & Integrated Service Delivery - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.

2) Co-location & Referral - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.

3) Direct Technological Linkage: Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff

4) Referral to Partner Facility - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					

**PARTNER NAME:** OREGON COMMISSION FOR THE BLINDDate: **WSRV LOCATION:** Medford Bartlett Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
<b>BASIC CAREER SERVICES</b>					
Eligibility	Eligibility determination for Core Workforce Programs	No current linkage between WSRV & OCB; Eligibility for OCB services currently done at OCB offices including verification of blindness (contracted to doctor)	3) Direct Technological linkage: If a customer enters the workforce system other than through OCB, linking that customer to an OCB counselor through a direct tech linkage would be best as OCB VR Counselors are trained in requirements for obtaining services entitled to those legally blind.	The vision or ideal end state would entail a fully accessible workforce system for Oregonians with low to no vision. The necessary widespread knowledge of adaptive technology, dedicated hardware and software (including WSO programs) made accessible for low to no vision users, and collaboration will aid in accomplishing this vision.	
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	No current linkage between WSRV & OCB; Greeting, outreach, and intake conducted at OCB office but other information about services available through WSPM system not transmitted at this time.	1) An OCB staff member could hold limited office hours* at the one-stop center and provide these services 3) customers could be connected directly through technology for information on OCB services and other services available through the workforce system.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	Referral to community college	3) Direct technological linkage - referral		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	No current linkage between WSRV & OCB. OCB conducts these activities in-house, working closely with VR and other disability-focused organizations	1) OCB staff member could hold limited office hours* at one-stop centers 3) Direct technological linkage could allow greater collaboration in helping businesses interested in hiring low to no vision employees		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Very limited referrals to other programs and services within WSRV and beyond	1) OCB staff member could hold limited office hours* at one-stop centers 3) Direct technological linkage could allow for effective use of referrals for services within WSRV and beyond		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Conducted by OCB staff	1) OCB staff member could hold limited office hours at one-stop center allowing for more collaboration surrounding labor market statistics 3) Direct technological linkage could allow more collaboration in gathering and understanding labor market statistics		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	N/A	1) OCB staff member could hold limited office hours* to communicate this information 3) Direct technological linkage		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Information provided by counselor and referral to other organization	1) OCB staff member could hold limited office hours* at one-stop centers to discuss client needs before referral to appropriate agency		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Assistance provided by OCB as possible (lack of accessibility often hinders filling out these forms without assistance or at one-stop centers)	3) Direct technological linkage: OCB can make direct connections to UI services for customers through technology if it is accessible to visually		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Information provided by counselor and referral	1) OCB staff member could hold limited office hours* at one-stop centers to discuss client needs before referral to appropriate agency		
<b>INDIVIDUALIZED CAREER SERVICES</b>					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	Conducted at OCB offices through collaboration of Vocational Rehabilitation Counselors and Instructors	1) OCB staff can hold limited office hours* at one-stop centers providing some of these services at the one-stop center 3) Direct technological linkage can aid WSRV and OCB staff in connecting customers with these services in a timely manner	The vision or ideal end state would entail a fully accessible workforce system for Oregonians with low to no vision. The necessary widespread knowledge of adaptive technology, dedicated hardware and software (including WSO programs) made accessible for low to no vision users, and collaboration will aid in accomplishing this vision.	
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Conducted at OCB offices by Vocational Rehabilitation Counselors	1) OCB staff can hold limited office hours at one-stop centers providing some of these services at the one-stop center 3) Direct technological linkage can aid WSRV and OCB staff in connecting customers with these services in a timely manner		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Conducted at OCB offices by Vocational Rehabilitation Counselors	1) OCB staff can hold limited office hours* at one-stop centers providing some of these services at the one-stop center 3) Direct technological linkage can aid WSRV and OCB staff in connecting customers with these services in a timely manner		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Conducted at OCB offices through collaboration of Vocational Rehabilitation Counselors and Instructors	1) OCB staff can hold limited office hours* at one-stop centers providing some of these services at the one-stop center 3) Direct technological linkage can aid WSRV and OCB staff in connecting customers with these services in a timely manner		
Internships/Work Experiences	Linked to careers	Conducted by OCB staff	1) OCB staff can hold limited office hours at one-stop centers providing service 3) direct technological linkage		
Financial Literacy Services	Youth - to help achieve long term financial stability.	Conducted by OCB staff	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage		
Relocation Support	Out-of-area job search assistance and relocation assistance.	Conducted by OCB staff	1) OCB staff can hold limited office hours* at one-stop centers providing		
ESL	English language acquisition and integrated education and training programs.	refer to another org	3) direct technological linkage - referral to appropriate partner		
Skill Validation		Conducted by OCB staff	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	Conducted by OCB Vocational Rehabilitation Counselors	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
<b>TRAINING SERVICES</b>					
Adult Education and Literacy	Instruction to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Refer to community college	3) Direct technological linkage	Enhance training opportunities for all Oregonians, especially low to no vision, through cross-sector partnerships and	
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	Provided by OCB	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	Provided by OCB	1) OCB staff can hold limited office hours at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	Provided by OCB	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service	appropriate technology and knowledge.	
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Provided by OCB	1) OCB staff can hold limited office hours at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	Not provided by OCB branch in this area	3) direct technological linkage- referral		
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Not provided by OCB branch in this area	3) Direct technological linkage - referral	Expanded business services utilizing all resources to increase employer awareness of skill set and ability of customers.	
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	Provided by OCB staff	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
Customized Recruitment	Customized recruitment events including targeted job fairs.	Not currently provided	3) Direct technological linkage - referral		
Customized LMI	For specific employers, sectors, industries or clusters.	Not provided by OCB branch in this area	3) Direct technological service		
Rapid Response	Assistance in managing reduction in workforce, including responding to the needs of laid-off workers.	Not provided by OCB branch in this area	3) Direct technological linkage		
Tax Credits	Assistance in accessing tax credits	Provided by OCB staff	1) OCB staff can hold limited office hours* at one-stop centers providing service 3) direct technological linkage to discuss and schedule service		
Outreach Services	To promote the benefits of working with the WSRV system.	Not currently provided	1) OCB staff can hold limited office hours* at one-stop centers 3) Direct technological linkage to discuss and schedule service		
OTHER SERVICES (Describe)					
*Delivery Method:					
WIOA required partners must provide access to its programs and activities at the One-Stop Centers. This does not mean that each required partner must provide these services directly on-site at Center. There are three options:					
1. Having a program staff member physically present at the American Job Center					
2. Having a staff member from a different partner program physically present at the Center and appropriately trained to provide information to customers about the programs, services, & activities available through all partner programs    Note: According to TEGL 16-16, for option 2, it is essential that the staff person providing information about a partner program document their time and effort to ensure that they allocate time to the appropriate program since salaries and wages are based on records, that accurately reflect the work performed consistent with Federal cost principles in the Uniform Guidance at 2 CFR 200.430.					
3. Making available a <u>direct linkage through technology</u> to a program staff member who can provide meaningful information or services.					
(As described in 20 CFR 678.305(d)(3), 34 CFR 361.305(d)(3), and 34 CFR 463.305(d)(3), a "direct linkage" means providing a direct connection at the American Job Center within a reasonable time, by phone or through a real-time web-based communication, to a program staff member who can provide program information or services, including career services, to the customer. Solely providing a phone number, website, information, pamphlets, or materials does not constitute a "direct linkage.")					

PARTNER NAME: DEPARTMENT OF HUMAN SERVICES

Date:

WSRV LOCATION: Medford Bartlett Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs	Currently we have two DHS staff members participating in the WSRV locations. These two positions go over 1.5 days week or as needed. They are responsible to do all activities that are included in the local branches. This included obtaining and documenting information about an individual's circumstances and comparing that information with the SSP eligibility criteria to decide if the individual qualifies for services. They attend classes and are available to serve clients as directed and needed. WSRV GPO and WSRV Bartlett	The future state would be a general understanding of all programs, so that, clients can receive several other options when working with SSP staff. The SSP Family Coach would be a part of the WSRV family and would be seen as "one of them" providing the same services. Those that are most vulnerable due to circumstances beyond there control, would be looked at first to determine priority service.		Title I - shared
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	SSP Family coaches greet clients as they are guided over to staff members for them. They are not in the greeter position at the WSRV. Services are shared as needed or asked of someone with more information.	Family Coaches would be able to perform all necessary functions with ease and understanding.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	Family Coaches are able to do an initial assessment at the WSRV using 7823 A&B. They are able to determine eligibility for programs under SSP DHS.	Family Coaches would be able to perform an assessment using a mutual tool to assist in navigating a customer to all eligible programs.		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	Referral to programs that we currently contract for.	Strong partnership in understanding our roles and helping assist with the purpose of helping those who identify as living under the poverty level or having obstacles towards employment.		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	The service involves referrals to and coordination of activities with other programs and services, including programs and services within the WSO - OSO delivery system and, when appropriate, other workforce development programs;	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Not currently doing at staff level			
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	Not currently doing at staff level			
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	SSP holds these programs and currently does eligibility for all programs except HUD. We refer and give out brochures for the Tax Credit program.	Same - Self Sufficiency is the lead who holds the expertise in poverty in the community and would be of support to the one stop but be the holder of contracts for this population and services.		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Referral .	Referral		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Referral	Referral		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	Currently there is a form used to conduct assessments for families who enter DHS for services. Based on the needs described we assist with case management or referrals to appropriate organizations for assistance	Would like to see one assessment used across organizations that clients complete periodically to adjust situation but not complete at all locations.		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Currently doing this at WSRV and other locations in the community as well as our departments	Same		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Initial assessment made and referred to other organizations as identified.	Same		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Rerral			
Internships/Work Experiences	Linked to careers	referral			
Financial Literacy Services	Youth - to help achieve long term financial stability.	Referral after assessment			
Relocation Support	Out-of-area job search assistance and relocation assistance.	DHS does have assistance for domestic survivors and those who have secured employment outside the area	A mutual understanding of all services available		
ESL	English language acquisition and integrated education and training programs.	Referral	Same		
Skill Validation		Referral	Same		
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	DHS does retention services for families who have found employment up to six months after.	1 year after		
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	Referral	Same		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	Referral	Same		
ITAs/Scholarships	referrals of qualified participants in training services to employers.	Referral	Same		
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	DHS provides this service internally but not at WSRV	Same but inclusion of training for all partners		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Referral	Inclusion of all		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.				
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Yes,			
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	Yes			
Customized Recruitments	Customized recruitment events including targeted job fairs.	Referral			
Customized LMI	For specific employers, sectors, industries or clusters.	referral			

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a closure or layoff or natural or other disaster which results in mass job loss.	Referral			
Tax Credits	Assistance in accessing tax credits	Referral			
Outreach Services	To promote the benefits of working with the WSRV system.	Referral			
OTHER SERVICES (Describe)					
*Delivery Method:					
1) Co-location & Integrated Service Delivery - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) Co-location & Referral - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) Direct Technological Linkage: Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff					
4) Referral to Partner Facility - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					

**PARTNER NAME:** TITLE IB - ROGUE WORKFORCE PARTNERSHIP / RESCARE (Service Provider) See

Date:

**WSRV LOCATION:** ☒ Medford Bartlett ☐ Medford Oakdale ☒ Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs	1)WOMIS is completed. Based on need staff completes assessment with clients, refers as needed or helps at WSRV.	Medford WSRV to be co-located, more co-location with all partners.		
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	1) All staff at WSRV assist in these services. Oakdale staff on greeters schedule in Medford and Bartlett trained to assist Oakdale. OED staff and ResCare staff share in FSW, JOBS orientation, Monday Check In and Intro to WorkForce.	Medford WSRV to be co-located		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	2) Conduct NCRC, CASA and pre GED. Based on need with skills utilize GED Academy, JOBS tutor or Penn Foster, if needs supported or classroom environment we refer to SOGI, RCC or other community partner.	TBD		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	1 & 3) Utilization of OLMIS to assist in career guidance with participants. Up to date strategies with resume development, interviewing skills and needs of local employers are discussed, specifically in FSW and one on one interactions.	TBD		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	2) Partners are working to limit need of location hand offs and are working to integrate service delivery. OED and ResCare have launched some partners are coordinated in differing ways, no consistent process in place.	Medford WRSV to be co-located with the hope that other partners will be part of the co-location.		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	1) Use OLMIS to run reports for a variety of areas and positions, IEP, NCRC and placement into ITA, OJT, JOBS Plus and WEX as well as referral to further skills through educator/certification.	TBD		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	1) Utilization of ETPL info.	Better feedback on experience, expanded ETPL.		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	1) WSRV provides services to referred TANF participants and are well trained on resources or access to finding resoruces.	TBD		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	2) Warm hand off to OED. Coordination of services into Rethinking Job Search.	TBD		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	4) Referral	TBD		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	2) WSRV conducts IEP and interview however, may need to refer based on needed to Mental Health, VR, DHS, SOGI, etc.	TBD		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	1) WSRV reviews IEP assessments with participants to identify goals and steps to execute.	TBD		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	1) Use IEP as road map with one on one conversations, addressing barriers, use FSW, ITAs, OJTS WEX and JOBS Plus to build experience, steps to the end goal.	TBD		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	1) Strongly integrated approach to conducting FSW, mock interviewing, and Job Net (having employers message this).	TBD		
Internships/Work Experiences	Linked to careers	1) Currently conduct WEX, JOBS Plus and OJT to build work experience.	TBD		
Financial Literacy Services	Youth - to help achieve long term financial stability.	2) Conduct finance classes to all participants, one on one tips. Also refer as needed.	Utilization of Money Skills		
Relocation Support	Out-of-area job search assistance and relocation assistance.	2) Support as can, refer.	TBD		
ESL	English language acquisition and integrated education and training programs.	2) WSRV has taken integrated approach to setting up FSW in Spanish, classes to launch this summer.	More full scale services as we build Spanish speaking curriculum and see mre demand for servies.		
Skill Validation		2) Conduct NCRC, document certifications, if needs supported or classroom environment we refer to SOGI, RCC or other community partner.	TBD		
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	1) Follow up as required per program and agreement with participant.	TBD		
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	2) Conduct NCRC, document certifications, if needs supported or classroom environment we refer to SOGI, RCC or other community partner.	TBD		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	1) WSRV iBOTS team has coordinated services in coordination reaping over a hundred OJTS this PY with a majority being in a sector strategy.	Further coordination of other community partners outside OED & ResCare.		
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	1) WSRV utilizes labor market info, IEP and aptitude/career interest assessments to place participants in an ITA	Hope for more funding in next PY year and exanded ETPL		
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	1) We offer computer classes, FWS, incumbent worker OJTs and finance classes.	TBD		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	2) WSRV offers WEX, Jobs Plus, OJTs as in house opportunities but also refers to community apprenticeship programs as needed.	TBD		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	1) WEX, JOBS Plus and OJTs services all aim to do this. WSRV has assisted in the promoted and placement of many WSRV customers, heling both businesses and participants.	TBD		
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	1) Working with various sector strategy employers to place WEX, JOBS Plus, OJTs and direct placements. RWP helps in making connections as well.	TBD		
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	1) Work in partnership with OED to provide services.	TBD		
Customized Recruitments	Customized recruitment events including targeted job fairs.	1) WSRV does this in business outreach and connections.	TBD		
Customized LMI	For specific employers, sectors, industries or clusters.	3) Use OLMIS to run reports for a variety of areas and positions	TBD		

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a a closure or layoff or natural or other disaster which results in mass job loss.	1) Coordinated effort from OED, ResCare and RWP.	TBD		
Tax Credits	Assistance in accessing tax credits	2) IBOTs team strongly promotes WOTC, also utilizes SOREDI as a SME	TBD		
Outreach Services	To promote the benefits of working with the WSRV system.	1) Word of mouth, community events, industry tours and business visits.	More coordinated effort with budget available		
OTHER SERVICES (Describe)					
*Delivery Method:					
1) <b>Co-location &amp; Integrated Service Delivery</b> - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) <b>Co-location &amp; Referral</b> - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) <b>Direct Technological Linkage</b> : Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff					
4) <b>Referral to Partner Facility</b> - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					



PARTNER NAME:

TITLE II ADULT BASIC SKILLS - HECC / (Rogue Community College -Service Provider)

WSRV LOCATION:

Medford BartlettMedford OakdaleGrants Pass

Revised 3/27/2017

Date:

II					
SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
BASIC CAREER SERVICES					
Eligibility	Eligibility determination for Core Workforce Programs				Title I - shared
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.				
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.				
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment				
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Referrals to WIOA partners for help with job search and training.	4. Referral Future - integrated with our course and study options		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Career and College Awareness Class and workshops.	4. Referral Future - imbedded in RCC ABS courses and/or offered at our partner locations.		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	Referral guide	4. Referral		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Referral guide	4. Referral		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.				
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	TRIO FAFSA workshops	4. Referral Future - can hold workshops at partner location		
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	Orientation and advising	4. Referral Future - can hold orientations at partner locations		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Orientation and advising	4. Referral Future - RCC ABS transition advisor available at partner locations		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Career and College Awareness Class and workshops.	4. Referral Future - can hold workshops at partner location		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Career and College Awareness Class and workshops.	4. Referral Future - can hold workshops at partner location		
Internships/Work Experiences	Linked to careers				
Financial Literacy Services	Youth - to help achieve long term financial stability.	SALT Money Management Online Tools	4. Referral		
Relocation Support	Out-of-area job search assistance and relocation assistance.				
ESL	English language acquisition and integrated education and training programs.	ELA classes, EL Civics, VESL (early childhood education)	4. Referral - can contract to offer contextualized instruction		
Skill Validation					
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.				
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	ABS GED and ELA classes and guided study labs, direct instruction, tutoring and online tools	4. Referral		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.				
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.				
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	ABS GED and ELA classes and guided study labs, direct instruction, tutoring and online tools	4. Referral		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.				

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.				
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	Local Leadership Team, Title II Subcommittee			
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.				
Customized Recruitments	Customized recruitment events including targeted job fairs.	Literacy Events	4. Referral		
Customized LMI	For specific employers, sectors, industries or clusters.				
Rapid Response	Assistance in managing reduction in workforce, including responding to the annoucement of a a closure or layoff or natural or other disaster which results in mass job loss.				
Tax Credits	Assistance in accessing tax credits				
Outreach Services	To promote the benefits of working with the WSRV system.				
OTHER SERVICES (Describe)					
*Delivery Method:					
1) Co-location & Integrated Service Delivery - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) Co-location & Referral - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) Direct Technological Linkage: Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program					
4) Referral to Partner Facility - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					

**PARTNER NAME:** TITLE III / TAA / VETERANS / UI - OREGON EMPLOYMENT DEPARTMENT**Date:** 3/26/17 Sherri Stratton**WSRV LOCATION:** Medford Bartlett Medford Oakdale ☒ Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
<b>BASIC CAREER SERVICES</b>					
Eligibility	Eligibility determination for Core Workforce Programs	3) Direct Technological Linkage - WorkSource Oregon Registration (WOMIS). Provide supports to customers in Resource Room. Review information during Welcome and REA Conversations.	3) Direct Technological Linkage - WorkSource Oregon Registration (WOMIS). Provide supports to customers in Resource Room. Review information during Welcome and REA Conversations.		Title III Funding
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	1) Co-location and Integrated Service Delivery. Provide Exploratory service. Co-facilitate Introduction to Workforce Services. Provide MSFW and Veteran Outreach Services	1) Co-location and Integrated Service Delivery. Provide Exploratory service. Co-facilitate Introduction to Workforce Services. Provide MSFW and Veteran Outreach Services.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	1)Co-location and Integrated Service Delivery. Referral to on-line resources, NCRC, GED, ABE, OPAC, and other services.	1) Co-location and Integrated Service Delivery. Referral to on-line resources, NCRC, GED, ABE, OPAC, and other services.		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	1) Co-location and Integrated Service Delivery. Promote iMatchskills for job seekers and job listings. Provide information during Job Net and other activities.	1) Co-location and Integrated Service Delivery. Promote iMatchskills for job seekers and job listings. Provide information during Job Net and other activities.		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	2) Co-location and Referral. Make referrals to WIOA, JOBS, VR, RCC, etc.	1) Co-location and Integrated Service Delivery		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Economist and Workforce Analyst assist WIB, Community and Employers. Integrated Service Delivery in teaching FSW-Labor Market Information	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Economist and Workforce Analyst assist WIB, Community and Employers. 1) Integrated Service Delivery in teaching FSW-Labor Market Information		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Primarily refer to Bartlett for ETPL/Training consideration.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Primarily refer to Bartlett for ETPL/Training consideration.		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Make referrals to other agencies.	2) Co-location and Referral. One-on-one coaching during Welcome, REA Conversations and follow-up appointments. Make referrals to other agencies.		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer customers to UI Centers.	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome and REA Conversations. Refer customers to UI Centers. Would like to have local to have a local UI Navigator.		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Referrals to Colleges and Training Centers.	2) Co-location and Referral.		
<b>INDIVIDUALIZED CAREER SERVICES</b>					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations and follow-up appointments. Complete REA Plans to establish employment goals.	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	1)Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Create IEP for OJT customers.	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	1)Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments.	1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	1)Co-location and Integrated Services. Co-facilitation for Foundational Skills Workshops.	1) Co-location and Integrated Service Delivery. Co-facilitation of Foundational Skills Workshops.		
Internships/Work Experiences	Linked to careers	2) Co-location and Referral. Referral to WIOA, JOBS, SCEPT Programs.	2) Co-location and Referral to WIOA, JOBS, SCEPT Programs.		
Financial Literacy Services	Youth - to help achieve long term financial stability.	2) Co-location and Referral. Referral to WIOA or community services.	2) Co-location and Referral. Refer to WIOA or community services.		
Relocation Support	Out-of-area job search assistance and relocation assistance.	2) Co-location and Referral. Trade Act Programs provide relocation supports.	2) Co-location and Referral. Trade Act Programs provide relocation supports.		
ESL	English language acquisition and integrated education and training programs.	4) Referral to Partner Facility. Referral to RCC ESL classes.	4) Referral to Partner Facility. Referral to RCC ESL classes.		
Skill Validation		2) Co-location and Integrated Service Delivery. Use iMatchSkills to validate work history and skills. Refer to NCRC, OPAC and FSW.	1) Co-location and Integrated Service Delivery. Use iMatchSkills to validate work history and skills. Refer to NCRC, OPAC and FSW. Prove It?		
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	2) Co-location and Referral. Follow-up services provided by WIOA programs.	2) Co-location and Referrals. Follow-up services provided by WIOA programs.		
<b>TRAINING SERVICES</b>					
Adult Education and Literacy	Instruction to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	4) Referral to Partner Facility. Refer to RCC.	4) Referral to Partner Facility. Refer to RCC		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	1)Co-location and Integrated Service Delivery. Integrated business team members assist with OJT services.	1) Co-location and Integrated Service Delivery. Integrated business team members assist with OJT services.		
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA and Apprenticeship Training Resources.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	2)Co-location and Referral. Refer to WIOA.	2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
<b>BUSINESS SERVICES</b>					

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
Sector Partnerships	Develop, convene and implement sector partnerships.	Title 1 - 2)Co-location and Referral. Refer to RWP sector strategy efforts.	Title 1 - 2)Co-location and Referral. Refer to RWP sector strategy efforts.		
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	1)Co-location and Integrated Service Delivery. Business team members provide customized screening and referrals.	1)Co-location and Integrated Service Delivery. Business team members provide customized screening and referrals.		
Customized Recruitments	Customized recruitment events including targeted job fairs.	1)Co-location and Integrated Service Delivery. Business team members provide customized recruitments and job fairs.	1)Co-location and Integrated Service Delivery. Business team members provide customized recruitment and job fairs.		
Customized LMI	For specific employers, sectors, industries or clusters.	1)Co-location and Integrated Service Delivery. Refer to Economist or Workforce Analyst. Business team members provide customized LMI basic information to businesses using Quality Info.	2)Co-location and Referral. Refer to Economist or Workforce Analyst. Business team members provide customized LMI basic information to businesses using Quality Info.		
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a closure or layoff or natural or other disaster which results in mass job loss.	1)Co-location and Integrated Service Delivery. Provide Rapid Response Coordinator and WSRV staff support for Rapid Response Informational Sessions.	1)Co-location and Integrated Service Delivery. Provide Rapid Response Coordinator and WSRV staff support for Rapid Response Informational Sessions.		
Tax Credits	Assistance in accessing tax credits	1)Co-location and Integrated Service Delivery. Integrated business team members promote WOTC services to businesses.	1)Co-location and Integrated Service Delivery. Business team members promote WOTC services to businesses.		
Outreach Services	To promote the benefits of working with the WSRV system.	1)Co-location and Integrated Service Delivery. Participate in community events, job fairs and other outreach efforts to promote benefits of WSRV services.	1)Co-location and Integrated Service Delivery. Participate in community events, job fairs and other outreach efforts to promote benefits of WSRV services.		
OTHER SERVICES (Describe)					
*Delivery Method:					
1) Co-location & Integrated Service Delivery - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) Co-location & Referral - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) Direct Technological Linkage: Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff					
4) Referral to Partner Facility - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					

**PARTNER NAME:** Oregon Employment Department**Date:** 3/26/17 Sherri Stratton**WSRV LOCATION:** Medford Bartlett x Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
<b>BASIC CAREER SERVICES</b>					
Eligibility	Eligibility determination for Core Workforce Programs	Title I - 3) Direct Technological Linkage - WorkSource Oregon Registration (WOMIS). Provide supports to customers in Resource Room. Review information during Welcome and REA Conversations.	Title I - 3) Direct Technological Linkage - WorkSource Oregon Registration (WOMIS). Provide supports to customers in Resource Room. Review information during Welcome and REA Conversations.		Title I Funding
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	Title I - 2) Co-location and referral. Provide Exploratory service. Co-facilitate Introduction to Workforce Services. Provide MSFW and Veteran Outreach Services	Title I -1) Co-location and Integrated Service Delivery. Provide Exploratory service. Co-facilitate Introduction to Workforce Services. Provide MSFW and Veteran Outreach Services.		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	Title I - 2)Co-location and referral. Referral to on-line resources, NCRC, GED, ABE, OPAC, and other services.	Title I -1) Co-location and Integrated Service Delivery. Referral to on-line resources, NCRC, GED, ABE, OPAC, and other services.		
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	Title I - 2) Co-location and Referral. Promote iMatchskills for job seekers and job listings. Provide information during Job Net and other activities.	Title I -1) Co-location and Integrated Service Delivery. Promote iMatchskills for job seekers and job listings. Provide information during Job Net and other activities.		
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	Title I - 2) Co-location and Referral. Make referrals to Bartlett Office, VR, RCC, etc.	Title I -1) Co-location and Integrated Service Delivery		
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	Title I - 2) Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Economist and Workforce Analyst assist WIB, Community and Employers. Integrated Service Delivery in teaching FSW-Labor Market Information	Title I -1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Economist and Workforce Analyst assist WIB, Community and Employers. 1) Integrated Service Delivery in teaching FSW-Labor Market Information		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Primarily refer to Bartlett for ETPL/Training consideration.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Primarily refer to Bartlett for ETPL/Training consideration.		
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Make referrals to other programs or agencies.	Title I - 2) Co-location and Referral. One-on-one coaching during Welcome, REA Conversations and follow-up appointments. Make referrals to other programs or agencies.		
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer customers to UI Centers.	Title I -1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome and REA Conversations. Refer customers to UI Centers.		
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Referrals to Colleges and Training Centers.	Title I -2) Co-location and Referral.		
<b>INDIVIDUALIZED CAREER SERVICES</b>					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations and follow-up appointments. Complete REA Plans to establish employment goals.	Title I - 1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Create IEP for OJT customers.	Title I -1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments.	Title I -1) Co-location and Integrated Service Delivery. One-on-one coaching during Welcome, REA Plans, SNAP Plans, and follow-up appointments.		
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	Title I - 2)Co-location and Referral. Co-facilitation for Foundational Skills Workshops.	Title I -1) Co-location and Integrated Service Delivery. Co-facilitation of Foundational Skills Workshops.		
Internships/Work Experiences	Linked to careers	Title I - 2) Co-location and Referral. Referral to WIOA, JOBS, SCEPT Programs.	Title I - 2) Co-location and Referral to WIOA, JOBS, SCEPT Programs.		
Financial Literacy Services	Youth - to help achieve long term financial stability.	Title I - 2) Co-location and Referral.	Title I - 2) Co-location and Referral.		
Relocation Support	Out-of-area job search assistance and relocation assistance.	Title I - 2) Co-location and Referral.	Title I - 1) Co-location and Integrated Service Delivery.		
ESL	English language acquisition and integrated education and training programs.	Title I - 2) Co-location and Referral. Referral to RCC ESL classes.	Title I - 2) Co-location and Referral to RCC ESL classes.		
Skill Validation		Title I - 2) Co-location and Referral. Use iMatchSkills to validate work history and skills. Refer to NCRC, OPAC and FSW.	Title I - 1) Co-location and Integrated Service Delivery. Use iMatchSkills to validate work history and skills. Refer to NCRC, OPAC and FSW. Prove It?		
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	Title I - 2) Co-location and Referral.	Title I - 1) Co-location and Integrated Service Delivery.		
<b>TRAINING SERVICES</b>					
Adult Education and Literacy	Instruction to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	4) Refer to Partner Facility. Refer to RCC.	4) Refer to Partner Facility. Refer to RCC		
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	Title I - 2)Co-location and Referral. Integrated business team members assist with OJT services.	Title I -1) Co-location and Integrated Service Delivery. Integrated business team members assist with OJT services.		
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Current Worker Training	Training provided to currently employed workers to advance or retain employment.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA and Apprenticeship Training Resources.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.	Title I - 2)Co-location and Referral. Refer to WIOA. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.	Title I - 2)Co-location and Referral. One-on-one coaching during Welcome, REA Conversations, and follow-up appointments. Refer to WIOA.		
<b>BUSINESS SERVICES</b>					
Sector Partnerships	Develop, convene and implement sector partnerships.	Title I - 2)Co-location and Referral. Refer to RWP sector strategy efforts.	Title I - 2)Co-location and Referral. Refer to RWP sector strategy efforts.		

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	Title I - 2)Co-location and Referral. Business team members provide customized screening and referrals.	Title I - 1)Co-location and Integrated Service Delivery. Business team members provide customized screening and referrals.		
Customized Recruitments	Customized recruitment events including targeted job fairs.	Title I - 2)Co-location and Referral. Business team members provide customized recruitments and job fairs.	Title I - 1)Co-location and Integrated Service Delivery. Business team members provide customized recruitment and job fairs.		
Customized LMI	For specific employers, sectors, industries or clusters.	Title I - 2)Co-location and Referral. Refer to Economist or Workforce Analyst. Business team members provide customized LMI basic information to businesses using Quality Info.	Title I - 1)Co-location and Integrated Service Delivery. Refer to Economist or Workforce Analyst. Business team members provide customized LMI basic information to businesses using Quality Info.		
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a closure or layoff or natural or other disaster which results in mass job loss.	Title I - 2)Co-location and Referral. Provide Rapid Response Coordinator and WSRV staff support for Rapid Response Informational Sessions.	Title I - 1)Co-location and Integrated Service Delivery. Provide Rapid Response Coordinator and WSRV staff support for Rapid Response Informational Sessions.		
Tax Credits	Assistance in accessing tax credits	Title I - 2)Co-location and Referral. Integrated business team members promote WOTC services to businesses.	Title I - 1)Co-location and Integrated Service Delivery. Business team members promote WOTC services to businesses.		
Outreach Services	To promote the benefits of working with the WSRV system.	Title I - 1)Co-location and Integrated Service Delivery. Participate in community events, job fairs and other outreach efforts to promote benefits of WSRV services.	Title I - 1)Co-location and Integrated Service Delivery. Participate in community events, job fairs and other outreach efforts to promote benefits of WSRV services.		
OTHER SERVICES (Describe)					
*Delivery Method:					
1) <b>Co-location &amp; Integrated Service Delivery</b> - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) <b>Co-location &amp; Referral</b> - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) <b>Direct Technological Linkage:</b> Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff					
4) <b>Referral to Partner Facility</b> - WSRV staff refer customers to you facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					

PARTNER NAME: TITLE IV - VOCATIONAL REHABILITATION

Date:

WSRV LOCATION: Medford Bartlett Medford Oakdale Grants Pass

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(S)**
BASIC CAREER SERVICES					
WSO RV Services					
Eligibility	Eligibility determination for Core Workforce Programs	5) Conducted at VR-partner facility - Services are coordinated/provided for at partner agency facility	TBD for all categories		All funding is based on "110-services" state
Greeting, Outreach & Orientation	Greeting, outreach, intake and orientation (including worker profiling) to information and services available through the WSPM system.	2) Co-location & referral - 1 staff available in each county on an intermittent basis / 3) Direct Technological - VR staff are available during current business hours to answer questions about services and schedule intakes for services.	Physical presence and direct link through tech		
Initial Assessment	Of skill levels including literacy, numeracy and English language proficiency, as well as aptitudes and abilities (including skill gaps), and supportive service needs.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6 ) Contracted Service through AFP - may be contracted if VR is unable to complete on their own.			
Labor Exchange Services	Includes job search, placement, job listings, referrals, information on in-demand jobs and occupations, non-traditional employment	Either referred to WSO-RV or 6) Contracted Service through AFP - The VR Job Development contract contains all of the services related to job search/placement & retention			
Referrals	Provision of referrals to and coordination of activities with other programs and services within WSRV and beyond.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
Labor Market Statistics	Job vacancies, required job skills to obtain the local jobs listed, local in-demand jobs and earnings, skill requirements and opportunities for advancement.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6 ) Contracted Service through AFP - may be contracted if VR is unable to complete on their own.	Affiliate- LMI newsletter (Economic Indicators)		
Program Performance and Cost Information (ETPL)	Information regarding program performance and cost information on eligible providers of training services by program and type of provider.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
Support Service Information	Information related to the availability of supportive services, including child care, medical assistance (Medicaid and CHIP), HUD, SNAP, Earned Income Tax Credit, TANF, etc.	2) Co-location & referral / 3) Direct Technological linkage / 4) Referral to partner facility			
Unemployment Insurance Claim Filing and Information	Meaningful assistance in filing an unemployment insurance claim.	Not a function of OR VR and would be served through the Support Information Service Above.			
Financial Aid Availability	Assistance in establishing eligibility for programs of financial aid not provided under WIOA.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
INDIVIDUALIZED CAREER SERVICES					
Comprehensive Assessment	May include diagnostic testing, and use of other assessment tools, and in depth interviewing to identify employment barriers and appropriate employment goals.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) contracted service through AFP - may be contracted by VR if unable to complete with current information			
Individual Employment Plan	To identify employment goals, achievement objectives, combination of services.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
Career Planning	Customer centered approach that includes the development of appropriate service strategies, support services and other workforce activities necessary to obtain and retain employment.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
Pre-Vocational Services	Short term, includes learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) Contracted service through AFP -			
Internships/Work Experiences	Linked to careers	6) Contracted service through AFP -			
Financial Literacy Services	Youth - to help achieve long term financial stability.	4) VR refers to IL organizations for service as part of a cooperative agreement. 5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) Contracted service through AFP -			
Relocation Support	Out-of-area job search assistance and relocation assistance.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) Contracted service through AFP -			
ESL	English language acquisition and integrated education and training programs.	4) Referral to Partner Facility - 6) Contracted service through AFP			
Skill Validation		4) Referral to Partner Facility - 5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) Contracted service through AFP			
Follow-Up Services	Must be provided as appropriate, including counseling for up to 12 months after first day of employment.	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility 6) Contracted service through AFP -			
TRAINING SERVICES					
Adult Education and Literacy	Instruction to to address deficiencies in basic academic skills, including reading, writing, mathematics. Also includes English language acquisition.	4) Referral to Partner Facility - 6) Contracted service through AFP			
On-the-Job Training	A hire first program that reimburses employers for the extraordinary cost of training employees.	6) Contracted service through AFP -			
ITAs/Scholarships	An account linked to in-demand employment opportunities to support individuals to obtain occupational training.	6) Contracted service through AFP -			
Current Worker Training	Training provided to currently employed workers to advance or retain employment.				
Work-based Training	Including registered apprenticeship, and joint apprenticeship training programs.				
Customized Training	Conducted with a commitment of an employer to employ an individual upon successful completion of the training.				

SERVICE	DESCRIPTION (Refer to WIOA and WSO Standards for more details)	DELIVERY METHOD - CURRENT SERVICES	DELIVERY METHOD* - FUTURE SERVICES	VISION - END STATE	FUND SOURCE(s)**
BUSINESS SERVICES					
Sector Partnerships	Develop, convene and implement sector partnerships.	???????			
Customized Screening and Referrals	Referrals of qualified participants in training services to employers.	6) Contracted service through AFP -			
Customized Recruitments	Customized recruitment events including targeted job fairs.	???????			
Customized LMI	For specific employers, sectors, industries or clusters.	???????			
Rapid Response	Assistance in managing reduction in workforce, including responding to the announcement of a a closure or layoff or natural or other disaster which results in mass job loss.	???????			
Tax Credits	Assistance in accessing tax credits	5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility			
Outreach Services	To promote the benefits of working with the WSRV system.	???????			
OTHER SERVICES (Describe)					
*Delivery Method:					
1) Co-location & Integrated Service Delivery - Your program staff are physically present at WSRV & provide these services as a fully integrated team with other partner(s). Please indicate number of staff.					
2) Co-location & Referral - Your program staff are physically present at WSRV & customers are referred to your staff to receive services from your programs. Please indicate number of staff.					
3) Direct Technological Linkage: Making available a direct linkage through technology to your program staff that can provide meaningful information or services. A "direct linkage" means providing direct connections at the one-stop, within a reasonable time by phone or a real-time Web-based communication to a program staff					
4) Referral to Partner Facility - WSRV staff refer customers to your facility for services. Describe the process for referring shared and co-enrolled customers to program/service.					
5) Conducted at partner facility - Services are coordinated/provided for at partner agency facility					
6) Contracted Service - WSRV_VR contracts for these services through vendor agreements; are pre-authorized and based on the client individual plan of employment (IPE).					
**Fund Source:					
Identify the resources used to support the indicated service; list by funding stream.					





This **Cost Sharing/Infrastructure Funding Agreement** is part of the **Memorandum of Understanding** relating to the operation of the WorkSource Rogue Valley (WSRV) one-stop service delivery centers and system. This document ensures compliance with WIOA and its implementing regulations, and articulates the cost-sharing allocation methodology that WIOA required partners have agreed upon to achieve our shared goal of providing a comprehensive, demand-driven, seamless customer-facing service delivery system. Per federal requirements, the overarching guiding principle is to allocate costs based on each partner program's proportional use and benefits received.

In accordance with WIOA sec. 121 and implementing regulations, each required partner must use a portion of its funds to support infrastructure, career services and other shared costs of the WSRV One-Stop delivery system. RWP has convened and facilitated required partners to come to an agreement on a methodology for cost sharing and infrastructure funding.

This Cost Sharing / IFA identifies the specific infrastructure, career services and other shared costs and the method by which those costs will be supported in accordance with WIOA and Federal cost principles, which require that all costs must be allowable, reasonable, necessary, and allocable to the program and all other applicable legal requirements.

Per [WIOA TEGL No. 17-16](#)<sup>1</sup> "Funding provided by the one-stop partners to cover operating costs, including infrastructure costs, of the one-stop delivery system must be based on the partner program's proportionate use of the system and relative benefit received." As the local Workforce Development Board, RWP is responsible for managing the Infrastructure Funding Agreement, as well as collecting and disbursing the shared resources outlined within the Agreement.

### **Overview of Cost Allocation Methodology**

Rogue Valley partners will use the cost allocation and spreadsheet tool developed by the State of Oregon's workforce agency partners. Local partners agree to the following allocation methodology:

- Square footage allocation for infrastructure and related costs for staff physically located in the comprehensive and affiliate WorkSource Rogue Valley One-Stop Centers.
- Participant service counts of customers from each required WIOA program partner who access services at WorkSource Rogue Valley centers. Percentage share allocations will be applied to the WSRV One-Stop Center cost ascribed to career services, allocated related infrastructure and other identified shared costs as part of the calculation of each partners cost contribution.
- Contribution costs may be paid in cash or in-kind contributions to WSRV Center operations by partners. Specific arrangements will be negotiated and agreed upon individually between the RWP with each partner.

---

<sup>1</sup> See Training & Employment Guidance Letter WIOA No. 17-16 [https://wdr.doleta.gov/directives/corr\\_doc.cfm?DOCN=4968](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4968)



### **WorkSource Rogue Valley Centers Cost-Sharing Budget**

The following pages provide a budget for the July 2017-June 2018 program/fiscal year using the above methodology. Projected costs and staffing levels of onsite staff have been identified by WSRV Center partners, and the agreed upon methodology has been applied using customer service levels from PY/FY 2015-2016 (the most recently available). We hope to be using the PY/FY 2016-2017 customer service numbers for the first reconciliation in October 2017. Customer service counts in this budget are currently only available for some partners as follows:

<b>Data Currently Available / Allocation Listed</b>	<b>Data Currently Unavailable / No Allocation Listed</b>
<ul style="list-style-type: none"> <li>▪ Title I – <i>Rogue Workforce Partnership (Service Provider: ResCare)</i></li> <li>▪ Title II – <i>Higher Education Coordinating Commission (Service Provider: Rogue Community College)</i></li> <li>▪ Title III – <i>Oregon Employment Department</i></li> <li>▪ Title IV – <i>Oregon Vocational Rehabilitation</i></li> <li>▪ TANF/SNAP – <i>Oregon Department of Human Services</i></li> </ul>	<ul style="list-style-type: none"> <li>▪ Title IV – <i>Oregon Commission for the Blind</i></li> <li>▪ Title V – <i>Easter Seals</i></li> <li>▪ Post-Secondary Perkins CTE – <i>Rogue Community College</i></li> <li>▪ HUD – <i>Housing Authority of Jackson County</i></li> <li>▪ Job Corp</li> </ul>

### **Data Sharing**

The Oregon Employment Department (OED) provides support to regional WIOA partners by serving statewide as the data warehouse manager for cost-sharing purposes. Data sharing agreements and arrangements are in place with those agencies currently sharing their customer data. Those partner organizations not currently sharing data agree to enter into similar data sharing arrangements with the OED and/or the RWP, as needed, to ensure that their customer data can be added to the data warehouse in order to generate the allocation percentages needed. Alternatively and/or in the interim until such data sharing arrangements can be made, partner organizations may negotiate with the RWP as to an agreed upon set percentage amount based on their maximum estimated usage of the WSRV centers. Such arrangements will be at the discretion of the RWP.

### **Maximizing Customer Use of WorkSource Rogue Valley Centers**

All partners also agree to regularly review their total program population data relative to the actual number and percentage of use by their program customers. Partners all agree that they wish to maximize their customer's use of the WSRV Center services, and work against the natural disincentive that this particular methodology creates of not referring their customers to WSRV Centers in order to minimize cost incurred by the partner. The common goal is to use these available WSRV resources, and thus leverage all available resources to maximize benefits and successful outcomes for all customers of the workforce system.

### **Managing Fluctuations & Using Rolling 4-Quarter Average**

Using customer service numbers as a basis for cost allocation imbeds higher quarterly variability and the likelihood of fluctuation in each partner's percentage allocation, thus making it inherently more difficult for partners to budget and plan for actual costs incurred. In addition, the U.S. Department and Labor and Office of Management and Budget guidelines are explicitly clear that using just budgeted numbers is an unacceptable methodology for calculating cost allocation. To help mitigate this potential impact of variability between our projected budget and actually incurred costs, we will use a rolling 4-quarter average of the customer/participant service levels as the basis for this portion of the cost allocation



methodology. Partners will also monitor the impact of quarterly variations and adjust this methodology as needed to manage against undue variations in the allocation percentages.

#### Action Learning

Partners also acknowledge that the methodologies and data sharing tools being employed are all a “work in progress,” and that imperfections in these data sets, tools, etc. will need to be identified and corrected as we live and learn our way forward in WIOA implementation.

The Cost Sharing / IFA methodology and spreadsheet will be used, tested and refined over time. Any future changes will be agreed upon by all participating required partners. Updates and amendments to this methodology and this Appendix B will be made by required partners as necessary, and through a process of thoughtful deliberation, negotiation and mutual agreement that will be convened and facilitated by the RWP as needed.

Amendments to this Appendix B will not require modification or new signatures to the MOU. Required partners will be able to signify their affirmation to any agreed upon cost allocation methodology changes via the following methods:

- Signature on a signatory page of an updated Appendix B Cost Sharing / IFA document
- An Email affirmation as to their agreement
- Any other method agreed to by the RWP and partners

#### Quarterly Reconciliations

As of each calendar quarter, a reconciliation will be made using actual costs for that quarter, and using the most recent four quarters participant services data that the Oregon Employment Department has available. It is our goal, in this “work in progress”, to provide these reconciliations within 45 days of the end of each calendar quarter. If the partner is due a credit, a check will be included with the reconciliation. For those partners who have amounts due, a check must be received within 30 days of the receipt of the reconciliation. Any amounts received under a separate sublease will be credited against any amounts due.

#### Budget Pages

The budget documents on the following pages consist of:

- a) Consolidated Cost Summary** - *showing the total projected annualized contribution or credit each partner incurs*
- b) Medford Bartlett WSRV Center** - *costs, allocations, contributions or credits*
- c) Medford Oakdale WSRV Center** - *costs, allocations, contributions or credits*
- d) Grants Pass WSRV Center** - *costs, allocations, contributions or credits*
- e) Methodology Narrative**

Please note that these budget pages do not yet have placeholder columns for those partners that we don’t yet have data sharing arrangements with. These columns will be added in the updated first quarter “actual” spreadsheets, once data sharing arrangements have made and percentage allocations formulas are calculated.

## Cost Sharing Agreement Consolidation

Revised 8/24/17

<b>Total One Stop Costs:</b>	Infrastructure	Career Svcs Personnel	Other Costs	Total Costs	Less Direct Charges	Less OED CSGP Alloc.	Total Shared Costs
Medford-Bartlett	\$229,796	\$758,237	\$43,590	\$1,031,623	-\$56,211	-\$1,179	\$974,233
Medford-Oakdale	\$65,975	\$1,633,055	\$2,645	\$1,701,675	-\$14,497	-\$900,242	\$786,936
Total Medford	\$295,771	\$2,391,292	\$46,235	\$2,733,298	-\$70,708	-\$901,421	\$1,761,169
Grants Pass	\$295,364	\$1,160,382	\$29,310	\$1,485,056	-\$52,249	-\$455,012	\$977,795
TOTALS	\$591,135	\$3,551,674	\$75,545	\$4,218,354	-\$122,957	-\$1,356,433	\$2,738,964

### Net Result:

	Title I	OED	TANF	Voc Rehab	Title II	Title I Youth
Medford-Bartlett	-\$328,721	\$513,975	-\$128,974	\$3,730	\$1,454	-\$61,464
Medford-Oakdale	\$307,473	-\$374,475	\$64,232	\$1,596	\$1,174	
Total Medford	-\$21,248	\$139,500	-\$64,742	\$5,326	\$2,628	-\$61,464
Grants Pass	-\$94,987	\$184,326	-\$99,420	\$7,205	\$496	\$2,380
Amounts payable or (receivable)	-\$116,235	\$323,826	-\$164,162	\$12,531	\$3,124	-\$59,084

**Tab A**

**Infrastructure Worksheet**

**Rogue Workforce Partnership (Bartlett)**

**This worksheet identifies the costs to operate your facility.**

1. Enter the total square feet for your facility
2. Enter the annual cost for each cost item (rent, utilities, etc.)
3. Enter a "0" if no costs are anticipated for a specific item

			W/O IT & Phones	W/O All Operations
<b>Total Sq Ft</b>	12,579			
<b>Facilities</b>				
Rent	\$ 91,200			
Parking	\$ 9,472			
Improvements	\$ -			
Utilities	\$ 25,920			
Janitorial	\$ 17,112			
Maintenance and Repair	\$ 5,252			
Property Insurance	\$ 2,210			
Security	\$ 1,223			
<b>Total</b>	\$ 152,389	\$ 152,389	\$ 152,389	\$ 152,389
Annual Cost Per Sq Ft	\$ 12.115			
<b>Operations</b>				
Furniture	\$ -			
Telephone	\$ 24,000	\$ 24,000		
Internet	\$ 5,316	\$ 5,316	\$ 5,316	
IT Hardware/Software/Maintenance	\$ 26,968			
Copiers	\$ 21,123	\$ 21,123	\$ 21,123	
Equipment Maintenance	\$ -			
Supplies (Office Expenses)	\$ -			
Postage	\$ -			
Other (Subscriptions & Other Services)	\$ -			
<b>Total</b>	\$ 77,407			
Annual Cost Per Sq Ft	\$ 6.15			
<b>Total Infrastructure Costs</b>	\$ 229,796	\$ 202,828	\$ 178,828	\$ 152,389
Annual Cost Per Sq Ft	\$ 18.268	\$ 16.12	\$ 14.22	\$ 12.11

Tab B

Staff Space Worksheet

Rogue Workforce Partnership (Bartlett)

This worksheet identifies who's in your building and how much space they use.

1. Identify the programs in the office (top rows)
2. Enter the number of cubicles each program is using
3. Enter the average cubicle size for each program (use square feet)
4. Enter the size of a program's private office space (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

Career & Shared Services Staff Space		Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
Cubicles		0	0	0	0	0	0	0	0	0
Cubical Size sq ft		0	0	0	0	0	0	0	0	
Total Cubical Space		0	0	0	0	0	0	0	0	0
Office 1 size										0
Office 2 size										0
Office 3 size										0
Office 4 size										0
Office 5 size										0
Office 6 size										0
Dedicated Space		531.30	0.00	140.80	0.00	0.00	2.00	0.00	23.20	697.30
Common Area Space		405.78	0.00	107.54	0.00	0.00	1.53	0.00	17.72	532.56
Total Dedicated Staff Space		937.08	0.00	248.34	0.00	0.00	3.53	0.00	40.92	1229.86
Total Cost		\$ 17,119	\$ -	\$ 4,537	\$ -	\$ -	\$ 64	\$ -	\$ 748	\$ 22,467

Direct Charge Staff Space (Not Shared)		Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
Cubicles		0	0	0	0	0	0	0	0	0
Cubical Size sq ft		0	0	0	0	0	0	0	0	0
Total Cubical Space		0	0	0	0	0	0	0	0	0
Office 7 size										0
Office 8 size										0
Office 9 size										
Office 10 size										
Office11 size										
Office 12 size										0
Dedicated Space		346.70	67.01	397.65	48.86		54.72	693.81	135.83	1744.58
Common Area Space		264.79	51.18	303.70	37.32	0.00	41.79	529.89	103.74	1864.96
Total Dedicated Staff Space		611.49	118.19	701.35	86.18	0.00	96.51	1223.70	239.57	3076.98
Total Cost		\$ 11,171	\$ 2,159	\$ 12,812	\$ 1,574	\$ -	\$ 1,763	\$ 22,355	\$ 4,376	\$ 56,211
Credit to CCRN for all operational costs		\$ 2,485	\$ 480	\$ 2,850	\$ 350	\$ -	\$ 392	\$ (7,530)	\$ 973	\$ (0)
Credit for OED for phones and IT		\$ 99	\$ (479)	\$ 114	\$ 14	\$ -	\$ 16	\$ 198	\$ 39	\$ (0)
Credit for Voc Rehab for IT		\$ 38	\$ 7	\$ 43	\$ (185)	\$ -	\$ 6	\$ 76	\$ 15	\$ -
Adjusted Totals**		\$ 13,792	\$ 2,168	\$ 15,819	\$ 1,754	\$ -	\$ 2,177	\$ 15,098	\$ 5,403	\$ 56,211

\*\*It is important to note that in these adjustments, the other partners are not taking on the credited partners' shares, but that the amounts budgeted represent amounts used by just the uncredited partners.

## Tab C

### Shared Space Worksheet

#### Rogue Workforce Partnership (Bartlett)

This worksheet identifies how your space is being used.

1. Identify your career & shared services work spaces (resource room, training rooms, etc.)
2. Enter the amount of space for each of the career & shared work spaces (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

Staff Space		Annual Cost	
Dedicated Staff Space	1,745 sq ft	\$	31,870
Common Area Space	1,332 sq ft	\$	24,341
Total Dedicated Space	3,077 sq ft	\$	56,211
Career & Shared Services Space			
Staff Space	1,230 sq ft	\$	22,467
Room 101 (classroom)	656 sq ft	\$	11,984
Room 102 (computer lab)	615 sq ft	\$	11,235
Room 105 (classroom)	572 sq ft	\$	10,449
Room 201 (classroom)	749 sq ft	\$	13,683
Staff lounge	276 sq ft	\$	5,042
Resource Room	1,822 sq ft	\$	33,285
Allocated Common Space	3,582 sq ft	\$	65,440
		\$	-
Total Shared Space	9,502 sq ft	\$	173,585
Total of All Space	12,579 sq ft	\$	229,796

**Tab D**

**Career Services Worksheet**

**Rogue Workforce Partnership (Bartlett)**

**This worksheet identifies career & shared services FTE and costs.**

1. Identify which partners are providing one-stop management, the FTE provided, and the cost
2. Identify which partners are providing which career & shared service staff, the FTE provided, and the cost
3. Repeat for each career & shared service

Note: Staffing costs are made up of salary and benefits, as well as any associated indirect costs.

	Title 1	OED W-P	TANF JOBS/OFFSET	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Total
<b>One-Stop Management Staff</b>	0.7								0.7
<b>Career &amp; Shared Services Staff</b>									
Reception									0
Exploratory Services									0
Career Services	6.17		3.28			0.05		1.93	11.425
Case Management									0
Business Services	0.015		0.51						0.525
Workshops									0
Staff Training									0
Other									0
<b>Career/Shared Services &amp; Mgmt Staff Totals</b>	6.88	0	3.79	0	0	0.05	0	1.93	12.65
<b>Salaries and Benefits for Program Staff</b>	\$ 463,976	\$ -	\$ 224,313	\$ -	\$ -	\$ 3,080	\$ -	\$ 66,868	<u>\$ 758,237</u>



**Tab E****Other Shared Cost -- Worksheet****Rogue Workforce Partnership (Bartlett)****Other Costs**

iTrac (WorkSystems)	\$	18,950
One Stop Operator / Consultant	\$	24,640

**System Costs Total** \$ 43,590

**Agreement Management**

Development	\$	-
Reconciliation	\$	-

**Agreement Management Total** \$ -

**This worksheet identifies broader system activities and costs.**

1. Enter the annual cost for each cost item
2. Enter a "0" if no costs are anticipated for a specific item

Note: This is a place where partners can "true up" by offering additional services

## Tab F

### Allocation Bases Worksheet

#### Rogue Workforce Partnership (Bartlett)

This worksheet collects the data for use in the allocation bases.

1. Enter the number of allocable shared services provided by each program
2. Direct hours charged by OED are placed in this intermediate cost pool, and then distributed based on service counts
3. OED runs their CSGP allocations monthly and will provide quarterly totals for cost sharing reconciliation

Allocation Bases Input	Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
<b>Services</b>									
Allocable Shared Services	33,513	44,956	7,001	174	128	-	-		85,772
Percent	39.1%	52.4%	8.2%	0.2%	0.1%	0.0%	0.0%		100%

#### Common Services Grants Pool (CSGP)

<b>Services</b>		
OED CSGP	54,073	54.60%
OED W-P	44,956	45.40%
Total OED	<u>99,029</u>	100.00%

Per OED's federally approved cost allocation plan, this worksheet identifies OED's costs allocated to their intermediate cost pool -- the Common Services Grants Pool.

<b>Tab G</b> <b>Cost Sharing Summary</b> <b>Rogue Workforce Partnership (Bartlett)</b>
--

**Program Year 2017                      (July 1, 2017 - June 30, 2018)**

**Step 1 --Verify costs to be shared and cost pools**

This section summarizes the office costs to be shared by the cost pool the expenditure will be included in.

**Estimated Shared Costs**

<b>Cost Pool</b>	<b>Annual Cost</b>
<b>Infrastructure</b>	\$ 229,796
Minus Direct Charge Costs	\$ (56,211)
<b>Total Infrastructure Shared Costs</b>	\$ 173,585
<b>Other Shared Costs</b>	
Career Services	\$ 758,237
Other Shared Costs	\$ 43,590
Minus OED CSGP Allocation	\$ (1,179)
Minus TAA Direct Charge Costs	\$ -
Minus SNAP E&T Direct Charge Costs	\$ -
Minus Other Direct Charge Costs	\$ -
<b>Total Other Shared Costs</b>	\$ 800,648
<b>Total Costs Shared</b>	<u><u>\$ 974,233</u></u>

**Step 2 -- Calculate the allocation of Shared Costs**

This section estimates the financial responsibility of each partner based on the chosen allocation base. Note that final financial responsibility will be based on costs and base actuals for the time period.

**Services (repeated from Tab F)**

Allocable Shared Services (duplicated)	33,513	44,956	7,001	174	128	-	-	-	85,772
Percent	39.1%	52.4%	8.2%	0.2%	0.1%	0.0%	0.0%	0.0%	100%

Cost Pool	Allocation Base		Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
Infrastructure	Services		\$ 67,823	\$ 90,982	\$ 14,169	\$ 352	\$ 259	\$ -	\$ -	\$ -	\$ 173,585
Other Shared Costs	Services		\$ 312,831	\$ 419,647	\$ 65,352	\$ 1,624	\$ 1,195	\$ -	\$ -	\$ -	\$ 800,648
<b>Estimated Financial Responsibility</b>			\$ 380,654	\$ 510,628	\$ 79,520	\$ 1,976	\$ 1,454	\$ -	\$ -	\$ -	\$ 974,233

**Step 3 -- Estimate contributions of cost by each program/partner**

Based on current (status quo) payment patterns, this section makes assumptions about which program would pay the expenditures, prior to cost-sharing reconciliation.

**Amount contributed based on current practice**

Cost Pool			Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
Infrastructure			\$ 229,796	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 229,796
Other Shared Costs			\$ 507,566	\$ -	\$ 224,313	\$ -	\$ -	\$ 3,080	\$ -	\$ 66,868	\$ 801,827
<b>Total Contributed</b>			\$ 737,362	\$ -	\$ 224,313	\$ -	\$ -	\$ 3,080	\$ -	\$ 66,868	\$ 1,031,623

**Step 4 -- Reconciliation - addressing Contribution vs Benefit Received**

Then the section estimates the amount of the reconciliation. This equates to the change in the status quo.

Cost Pool			Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Rethinking Job Search	CCRN	Title 1 Youth	Totals
Shared Services Responsibility			\$ 380,654	\$ 510,628	\$ 79,520	\$ 1,976	\$ 1,454	\$ -	\$ -	\$ -	\$ 974,233
Less Contribution			\$ (737,362)	\$ -	\$ (224,313)	\$ -	\$ -	\$ (3,080)	\$ -	\$ (66,868)	\$ (1,031,623)
Direct Charges			\$ 13,792	\$ 2,168	\$ 15,819	\$ 1,754	\$ -	\$ 2,177	\$ 15,098	\$ 5,403	\$ 56,211
Reallocation to RWP (Title I)			\$ 14,195					\$ 903	\$ (15,098)		\$ -
Due from CSGP				\$ 1,179							\$ 1,179
<b>TOTAL DUE (REFUNDED)</b>			\$ (328,721)	\$ 513,975	\$ (128,974)	\$ 3,730	\$ 1,454	\$ 0	\$ -	\$ (61,464)	\$ (0)

## Tab A

### Infrastructure Worksheet

#### Rogue Workforce Partnership (Oakdale)

This worksheet identifies the costs to operate your facility.

1. Enter the total square feet for your facility
2. Enter the annual cost for each cost item (rent, utilities, etc.)
3. Enter a "0" if no costs are anticipated for a specific item

<b>Total Sq Ft</b>	9,743	
<b>Facilities</b>		
Rent		
Parking		
Improvements		
Utilities	\$ 19,769	
Janitorial		
Maintenance and Repair	\$ 22,196	
Property Insurance		
Security		
<b>Total</b>		\$ 41,965
<b>Annual Cost Per Sq Ft</b>		<b>Total Costs</b>
<b>Operations</b>		
Furniture	\$ -	
Telephone	\$ 23,935	
Internet	\$ -	
IT Hardware/Software/Maintenance	\$ -	
Copiers	\$ -	
Equipment Maintenance	\$ -	
Supplies (Office Expenses)	\$ -	
Postage	\$ -	
Other (State Govt Service Charges)	\$ 75	
<b>Total</b>		\$ 24,010
<b>Annual Cost Per Sq Ft</b>		\$ 2.46
<b>Total Infrastructure Costs</b>		\$ 65,975
<b>Annual Cost Per Sq Ft</b>		\$ 6.772

**Tab B**  
**Staff Space Worksheet**  
**Rogue Workforce Partnership (Oakdale)**

This worksheet identifies who's in your building and how much space they use.

1. Identify the programs in the office (top rows)
2. Enter the number of cubicles each program is using
3. Enter the average cubicle size for each program (use square feet)
4. Enter the size of a program's private office space (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

Career & Shared Services Staff Space

Cubicles

Cubical Size sq ft

Total Cubical Space

Office 1 size

Office 2 size

Office 3 size

Office 4 size

Office 5 size

Office 6 size

Dedicated Space

Common Area Space

Total Dedicated Staff Space

Total Cost

OED W-P	Title I Ad/DLW	TANF JOBS/ OFFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		Totals
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	
0	0	0	0	0	0	0	0	0	0	0	0	0
												0
												0
												0
												0
												0
												0
												0
1129.60										0.00		1129.60
1104.70					0.00	0.00	0.00	0.00	0.00	0.00	0.00	1104.70
2234.30	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	2234.30
\$ 15,130	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	##### ###

Direct Charge Staff Space (Not Shared)

Cubicles

Cubical Size sq ft

Total Cubical Space

Office 7 size

Office 8 size

Office 9 size

Office 10 size

Office11 size

Office 12 size

Dedicated Space

Common Area Space

Total Dedicated Staff Space

Total Cost

OED W-P	Title I Ad/DLW	TANF JOBS/ OFFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0	0	0	0	0	0
												0
												0
38.40					278.40	185.60	116.00	278.40	92.80	185.60		1175.20
37.55					272.26	181.51	113.44	272.26	90.75	181.51	0.00	1149.29
75.95	0.00	0.00	0.00	0.00	550.66	367.11	229.44	550.66	183.55	367.11	0.00	2324.49
\$ 514	\$ -	\$ -	\$ -	\$ -	\$ 3,729	\$ 2,486	\$ 1,554	\$ 3,729	\$ -	\$ 2,486	\$ -	\$ 14,497

**Tab C**

**Shared Space Worksheet**

**Rogue Workforce Partnership (Oakdale)**

**This worksheet identifies how your space is being used.**

1. Identify your career & shared services work spaces (resource room, training rooms, etc.)
2. Enter the amount of space for each of the career & shared work spaces (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

Staff Space		Annual Cost	
Dedicated Staff Space	1,175 sq ft	\$	7,958
Common Area Space	1,149 sq ft	\$	7,782
Total Dedicated Space	2,324 sq ft	\$	15,740
Career & Shared Services Space			
Staff Space	1,130 sq ft	\$	7,649
Breakroom	144 sq ft	\$	975
Classroom #1	667 sq ft	\$	4,515
Classroom #3	323 sq ft	\$	2,187
Classroom #4	187 sq ft	\$	1,266
Resource Room	1,300 sq ft	\$	8,801
Allocated Common Space	3,668 sq ft	\$	24,841
		\$	-
Total Shared Space	7,419 sq ft	\$	50,235
<b>Total of All Space</b>	<b>9,743 sq ft</b>	<b>\$</b>	<b>65,975</b>

**Tab D**  
**Career Services Worksheet**  
**Rogue Workforce Partnership (Oakdale)**

This worksheet identifies career & shared services FTE and costs. Entries are made in the gray boxes.

1. Identify which partners are providing one-stop management, the FTE provided, and the cost
2. Identify which partners are providing which career & shared service staff, the FTE provided, and the cost
3. Repeat for each career & shared service

Note: Staffing costs are made up of salary and benefits, as well as any associated indirect costs.

	OED W-P	Title I Ad/DLW	TANF JOBS/ OFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAII	TAA	UI Tax		Total
<b>One-Stop Management Staff</b>	0.8												0.8
<b>Career &amp; Shared Services Staff</b>													
Reception													0
Exploratory Services													0
Career Services	12.09												12.09
Case Management													0
Business Services	3.76												3.76
Workshops													0
Staff Training													0
Other													0
<b>Career/Shared Services &amp; Mgmt Staff Totals</b>	15.85	0	0	0	0	0	0	0	0	0	0	0	15.85
<b>Salaries and Benefits for Program Staff</b>	\$ 1,633,055	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,633,055
													2645
													\$ 1,635,700



**Tab E****Other Shared Costs -- Worksheet****Rogue Workforce Partnership (Oakdale)****Other Costs**

iTrac (WorkSystems)	\$	1,284.00	
WOMIS data system	\$	1,361.00	
Internet Service			
IT Hardware/Software/Maintenance			
Copiers			
<b>System Costs Total</b>			\$ 2,645

**Agreement Management**

Development	\$	-	
Reconciliation	\$	-	
<b>Agreement Management Total</b>			\$ -

**This worksheet identifies broader system activities and costs.**

1. Enter the annual cost for each cost item
2. Enter a "0" if no costs are anticipated for a specific item

Note: This is a place where partners can "true up" by offering additional services

Tab F

Allocation Bases & CSGP Worksheet

Rogue Workforce Partnership (Oakdale)

This worksheet collects the data for use in the allocation bases.

1. Enter the number of allocable shared services provided by each program
2. Direct hours charged by OED are placed in this intermediate cost pool, and then distributed based on service counts
3. OED runs their CSGP allocations monthly and will provide quarterly totals for cost sharing reconciliation

Allocation Bases Input	OED W-P	Title I Ad/DLW	TANF JOBS/ OFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		Totals
Services													
Allocable Shared Services	44,956	33,513	7,001	174	128								85,772
Percent	52.4%	39.1%	8.2%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%

Common Services Grants Pool (CSGP)

Services

OED CSGP	54,073	54.60%
OED W-P	44,956	45.40%
Total OED	99,029	100.00%

Per OED's federally approved cost allocation plan, this worksheet identifies OED's costs allocated to their intermediate cost pool -- the Common Services Grants Pool.

<b>Tab G</b> <b>Cost Sharing Summary</b> <b>Rogue Workforce Partnership (Oakdale)</b>
---

**Program Year 2017**                      **(July 1, 2017 - June 30, 2018)**

**Step 1 --Verify costs to be shared and cost pools**

This section summarizes the office costs to be shared by the cost pool the expenditure will be included in.

**Estimated Shared Costs**

<b>Cost Pool</b>	<b>Annual Cost</b>	
<b>Infrastructure</b>	\$ 65,975	
Minus Direct Charge Costs	\$ (14,497)	
<b>Total Infrastructure Shared Costs</b>	\$ 51,478	
		<b>Total Costs</b>
		\$ 1,699,030
<b>Other Shared Costs</b>		
Career Services	\$ 1,633,055	
Other Shared Costs	\$ 2,645	
Minus OED CSGP Allocation	\$ (900,242)	
Minus TAA Direct Charge Costs	\$ -	
Minus SNAP E&T Direct Charge Costs	\$ -	
Minus Other Direct Charge Costs	\$ -	
<b>Total Other Shared Costs</b>	\$ 735,458	
<b>Total Costs Shared</b>	<b>\$ 786,935</b>	

**Step 2 -- Calculate the allocation of Shared Costs**

This section estimates the financial responsibility of each partner based on the chosen allocation base. Note that final financial responsibility will be based on costs and base actuals for the time period.

**Services (repeated from Tab F)**

Allocable Shared Services (duplicated)	44,956	33,513	7,001	174	128	-	-	-	-	-	-	-	85,772
Percent	52.4%	39.1%	8.2%	0.2%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100%

Cost Pool	Allocation Base	OED W-P	Title I Ad/DLW	TANF JOBS/ OFFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		Totals
Infrastructure	Services	\$ 26,981	\$ 20,113	\$ 4,202	\$ 104	\$ 77	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 51,478
Other Shared Costs	Services	\$ 385,478	\$ 287,359	\$ 60,031	\$ 1,492	\$ 1,098	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 735,458
<b>Estimated Financial Responsibility</b>		\$ 412,459	\$ 307,473	\$ 64,232	\$ 1,596	\$ 1,174	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 786,935

**Step 3 -- Estimate contributions of cost by each program/partner**

Based on current (status quo) payment patterns, this section makes assumptions about which program would pay the expenditures, prior to cost-sharing reconciliation.

**Amount contributed based on current practice**

Cost Pool		OED W-P	Title I Ad/DLW	TANF JOBS/ OFFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		Totals
Infrastructure		\$ 65,975	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 65,975
Other Shared Costs		\$ 1,635,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,635,700
<b>Total Contributed</b>		\$ 1,701,675	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,701,675

**Step 4 -- Reconciliation - addressing Contribution vs Benefit Received**

Then the section estimates the amount of the reconciliation. This equates to the change in the status quo.

Cost Pool		OED W-P	Title I Ad/DLW	TANF JOBS/ OFFSET/REACH	VOC REHAB	Title II	Easter Seals	Experience Works	BOLI	OAH	TAA	UI Tax		Totals
Shared Services Responsibility		\$ 412,459	\$ 307,473	\$ 64,232	\$ 1,596	\$ 1,174	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 786,935
Less Contribution		\$ (1,701,675)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (1,701,675)
Direct Charges		\$ 514					\$ 3,729	\$ 2,486	\$ 1,554	\$ 3,729	\$ -	\$ 2,486	\$ -	\$ 14,497
Reallocation to OED		\$ 13,983					\$ (3,729)	\$ (2,486)	\$ (1,554)	\$ (3,729)		\$ (2,486)		\$ -
Due from CSGP		\$ 900,242												\$ 900,242
<b>TOTAL DUE (REFUNDED)</b>		\$ (374,476)	\$ 307,473	\$ 64,232	\$ 1,596	\$ 1,174	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ (0)

**Tab A**

**Infrastructure Worksheet**

**Rogue Workforce Partnership (Grants Pass)**

**This worksheet identifies the costs to operate your facility.**

1. Enter the total square feet for your facility
2. Enter the annual cost for each cost item (rent, utilities, etc.)
3. Enter a "0" if no costs are anticipated for a specific item

<b>Total Sq Ft</b>	14,810		<u>W/O IT</u>
<b>Facilities</b>			
Rent	\$ 168,012		
Common Area Maintenance (CAM)	\$ 21,336		
Improvements	\$ 10,778		
Utilities	\$ 21,306		
Janitorial	\$ 19,980		
Maintenance and Repair	\$ 7,700		
Property Insurance	\$ 1,820		
Security	\$ 1,784		
<b>Total</b>		\$ 252,716	\$ 252,716
<b>Annual Cost Per Sq Ft</b>		\$ 17.064	
<b>Operations</b>			
Furniture	\$ -		
Telephone	\$ 15,600	\$ 15,600	
Internet	\$ 3,984	\$ 3,984	
IT Hardware/Software/Maintenance	\$ 21,564		
Copiers	\$ 1,500	\$ 1,500	
Equipment Maintenance	\$ -		
Supplies (Office Expenses)	\$ -		
Postage	\$ -		
Other (Subscriptions & Other Services)	\$ -		
<b>Total</b>		\$ 42,648	
<b>Annual Cost Per Sq Ft</b>		\$ 2.88	
<b>Total Infrastructure Costs</b>		\$ 295,364	\$ 273,800
<b>Annual Cost Per Sq Ft</b>		\$ 19.944	\$ 18.49

## Tab B

### Staff Space Worksheet

#### Rogue Workforce Partnership (Grants Pass)

This worksheet identifies who's in your building and how much space they use.

1. Identify the programs in the office (top rows)
2. Enter the number of cubicles each program is using
3. Enter the average cubicle size for each program (use square feet)
4. Enter the size of a program's private office space (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

#### Career & Shared Services Staff Space

Cubicles  
Cubical Size sq ft  
Total Cubical Space  
Office 1 size  
Office 2 size  
Office 3 size  
Office 4 size  
Office 5 size  
Office 6 size  
Dedicated Space  
Common Area Space

Total Dedicated Staff Space

Total Cost

Title I Ad/DLW	OED W-P	TANF JOBS/ OFSET/REACH	Voc Rehab	Title II	Title I Youth		Totals
0	0	0	0	0	0	0	0
0	0	0	0	0	0	0	0
							0
							0
							0
							0
							0
249.36	560.4	169.36	0	0	0	0	979.12
198.06	445.12	134.52	0	0	0	0	778
447.42	1005.52	303.88	0	0	0	0	1757
\$ 8,923	\$ 20,054	\$ 6,060	\$ -	\$ -	\$ -	\$ -	\$ 35,037

#### Direct Charge Staff Space (Not Shared)

Cubicles  
Cubical Size sq ft  
Total Cubical Space  
Office 7 size  
Office 8 size  
Office 9 size  
Office 10 size  
Office11 size  
Office 12 size  
Dedicated Space  
Common Area Space

Total Dedicated Staff Space

Total Cost

Title 1 Ad/DLW	OED W-P	TANF JOBS/ OFSET/REACH	Voc Rehab	Title II	Title I Youth		Totals	
0	0	0	0	0	0	0	0	
0	0	0	0	0	0	0	0	
0	0	0	0	0	0	0	0	
								0
								0
								0
								0
517.80	282.84	480.03	113.32		66.11		1460.10	2439.22
411.28	224.65	381.28	90.01	0.00	52.51	0.00	1159.73	1937.4
929.08	507.49	861.31	203.33	0.00	118.62	0.00	2619.83	4376.65
\$ 18,529	\$ 10,121	\$ 17,178	\$ 4,055	\$ -	\$ 2,366	\$ -	\$ 52,249	
\$ 114	\$ 62	\$ 106	\$ (296)	\$ -	\$ 15	\$ -	\$ (0)	
\$ 18,643	\$ 10,183	\$ 17,283	\$ 3,759	\$ -	\$ 2,380	\$ -	\$ 52,249	

Credit for Voc Rehab for IT  
Adjusted Totals\*\*

\*\*It is important to note that in these adjustments, the other partners are not taking on the credited partners' shares, but that the amounts budgeted represent amounts used by just the uncredited partners.

## Tab C

### Shared Space Worksheet

#### Rogue Workforce Partnership (Grants Pass)

This worksheet identifies how your space is being used.

1. Identify your career & shared services work spaces (resource room, training rooms, etc.)
2. Enter the amount of space for each of the career & shared work spaces (use square feet)

Note: Common Area Space is made up of walkways, bathroom, breakroom, etc. and is automatically calculated.

Staff Space		Annual Cost	
Dedicated Staff Space	1,460 sq ft	\$	29,120
Common Area Space	1,160 sq ft	\$	23,129
Total Dedicated Space	2,620 sq ft	\$	52,249
Career & Shared Services Space			
Staff space	1,757 sq ft	\$	35,037
Resource Room	1,094 sq ft	\$	21,818
Rogue River Room (computer lab)	647 sq ft	\$	12,903
Josephine Room (classroom)	647 sq ft	\$	12,903
Siskiyou Room (classroom)	647 sq ft	\$	12,903
Annex (classrooms)	3,117 sq ft	\$	62,164
Staff lounge	187 sq ft	\$	3,729
Information Desk	56 sq ft	\$	1,117
Allocated Common Space	4,038 sq ft	\$	80,539
Total Shared Space	12,190 sq ft	\$	243,115
Total of All Space	14,810 sq ft	\$	295,364

## Tab D

### Career Services Worksheet

### Rogue Workforce Partnership (Grants Pass)

This worksheet identifies career & shared services FTE and costs.

1. Identify which partners are providing one-stop management, the FTE provided, and the cost
2. Identify which partners are providing which career & shared service staff, the FTE provided, and the cost
3. Repeat for each career & shared service

Note: Staffing costs are made up of salary and benefits, as well as any associated indirect costs.

	Title I Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Title I Youth		Total
<b>One-Stop Management Staff</b>	0.5							0.5
<b>Career &amp; Shared Services Staff</b>								
Reception								0
Exploratory Services								0
Career Services	3.117	6.40	3.340					12.857
Case Management								0
Business Services	0.165	1.55	0.575					2.29
Workshops								0
Staff Training								0
Other								0
<b>CareerShared Services &amp; Mgmt Staff Totals</b>	3.282	7.95	3.915	0	0	0	0	15.147
<b>Salaries and Benefits for Program Staff</b>	\$ 171,942	\$ 776,714	\$ 211,726	\$ -	\$ -	\$ -	\$ -	\$ 1,160,382
	\$ 383,668							



## Tab E

### Other Shared Costs -- Worksheet

#### Rogue Workforce Partnership (Grants Pass)

This worksheet identifies broader system activities and costs.

1. Enter the annual cost for each cost item
2. Enter a "0" if no costs are anticipated for a specific item

Note: This is a place where partners can "true up" by offering additional services

#### Other Costs

iTrac (WorkSystems)	\$ 18,950
One Stop Operator	\$ 10,360

<b>System Costs Total</b>	\$ 29,310
---------------------------	-----------

#### Agreement Management

Development	\$ -
Reconciliation	\$ -

<b>Agreement Management Total</b>	\$ -
-----------------------------------	------

## Tab F

### Allocation Bases & CSGP Worksheet

#### Rogue Workforce Partnership (Grants Pass)

This worksheet collects the data for use in the allocation bases.

1. Enter the number of allocable shared services provided by each program
2. Direct hours charged by OED are placed in this intermediate cost pool, and then distributed based on service counts
3. OED runs their CSGP allocations monthly and will provide quarterly totals for cost sharing reconciliation

Allocation Bases Input	Title I Ad/DLW	OED W-P	TANF	Voc Rehab	Title II	Title I Youth	Totals
<b>Services</b>							
Allocable Shared Services	13,893	17,987	3,447	125	18		35,470
Percent	39.2%	50.7%	9.7%	0.4%	0.1%	0.0%	100%

#### Common Services Grants Pool (CSGP)

<b>Services</b>		
OED CSGP	23,259	56.39%
OED W-P	17,987	43.61%
Total OED	<u>41,246</u>	100.00%

Per OED's federally approved cost allocation plan, this worksheet identifies OED's costs allocated to their intermediate cost pool -- the Common Services Grants Pool.

# **Tab G** **Cost Sharing Summary** **Rogue Workforce Partnership (Grants Pass)**

**Program Year 2017 (July 1, 2017 - June 30, 2018)**

## **Step 1 --Verify costs to be shared and cost pools**

This section summarizes the office costs to be shared by the cost pool the expenditure will be included in.

### **Estimated Shared Costs**

<b>Cost Pool</b>	<b>Annual Cost</b>
<b>Infrastructure</b>	\$ 295,364
Minus Direct Charge Costs	\$ (52,249)
<b>Total Infrastructure Shared Costs</b>	\$ 243,115
<b>Other Shared Costs</b>	
Career Services	\$ 1,160,382
Other Shared Costs	\$ 29,310
Minus OED CSGP Allocation	\$ (455,012)
Minus TAA Direct Charge Costs	\$ -
Minus SNAP E&T Direct Charge Costs	\$ -
Minus Other Direct Charge Costs	\$ -
<b>Total Other Shared Costs</b>	\$ 734,680
<b>Total Costs Shared</b>	<b>\$ 977,796</b>

Total  
\$ 1,432,808

## Step 2 -- Calculate the allocation of Shared Costs

This section estimates the financial responsibility of each partner based on the chosen allocation base. Note that final financial responsibility will be based on costs and base actuals for the time period.

### Services (repeated from Tab F)

Allocable Shared Services (duplicated)	13,893	17,987	3,447	125	18	-	35,470
Percent	39.2%	50.7%	9.7%	0.4%	0.1%	0.0%	100%

Cost Pool	Allocation Base	Title I Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Title I Youth	Totals
Infrastructure	Services	\$ 95,224	\$ 123,285	\$ 23,626	\$ 857	\$ 123		\$ 243,115
Other Shared Costs	Services	\$ 287,762	\$ 372,560	\$ 71,397	\$ 2,589	\$ 373		\$ 734,680
Estimated Financial Responsibility		\$ 382,986	\$ 495,845	\$ 95,023	\$ 3,446	\$ 496		\$ 977,796

## Step 3 -- Estimate contributions of cost by each program/partner

Based on current (status quo) payment patterns, this section makes assumptions about which program would pay the expenditures, prior to cost-sharing reconciliation.

### Amount contributed based on current practice

Cost Pool		Title I Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Title I Youth	Totals
Infrastructure		\$ 295,364	\$ -	\$ -	\$ -	\$ -		\$ 295,364
Other Shared Costs		\$ 201,252	\$ 776,714	\$ 211,726	\$ -	\$ -		\$ 1,189,692
Total Contributed		\$ 496,616	\$ 776,714	\$ 211,726	\$ -	\$ -		\$ 1,485,056

## Step 4 -- Reconciliation - addressing Contribution vs Benefit Received

This is the summary of all shared costs, direct costs, contributions, and CSGP share.

Reconciliation		Title I Ad/DLW	OED W-P	TANF JOBS/ OFFSET/REACH	Voc Rehab	Title II	Title I Youth	Totals
Shared Services Responsibility		\$ 382,986	\$ 495,845	\$ 95,023	\$ 3,446	\$ 496	\$ -	\$ 977,796
Less Contribution		\$ (496,616)	\$ (776,714)	\$ (211,726)	\$ -	\$ -	\$ -	\$ (1,485,056)
Direct Charges		\$ 18,643	\$ 10,183	\$ 17,283	\$ 3,759	\$ -	\$ 2,380	\$ 52,249
Due from CSGP			\$ 455,012					\$ 455,012
TOTAL DUE (REFUNDED)		\$ (94,987)	\$ 184,326	\$ (99,420)	\$ 7,205	\$ 496	\$ 2,380	\$ -

## ROGUE WORKFORCE PARTNERSHIP

### ONE-STOP COST SHARING METHODOLOGY NARRATIVE

The following narrative describes the data needed and steps taken in order to calculate the various partners' responsibilities to fund the One-Stop shared costs.

#### PREPARATORY WORK:

1. Outside of this spreadsheet, construct a list of all personnel within a particular location, and include the following:
  - a. Square footage of the person's designated area
  - b. FTE of the person (usually 1.0, but could be something less)
  - c. Individual funding source(s) the person is regularly assigned to
  - d. Percentage of time devoted to Shared One-Stop Services (i.e., Career Services, Business Services, Workshops, etc.)
  - e. Fully loaded salary of each person (this would include not only salary, payroll taxes and fringe, but also any indirect or other charge attributable to that salary)
2. Outside of this spreadsheet, construct a list of all Resource Room, classroom, and other designated spaces, and include the following:
  - a. Square footage of each designated area
  - b. Percentage of square feet devoted to Shared One-Stop Services
3. Subtract total designated staff (#1 above) and other designated spaces (#2 above) from the total square footage of the building to arrive at the total of common.
4. Capture other Shared Costs that have not been accounted for above (e.g., cost of data systems, One Stop Operator, etc.). Record this on Tab E.
5. Using the SERVICES count from the State, which contains the most recently available quarters' counts of services provided by funding source, record the counts and percentages of the non-CSGP funding sources and record on Tab F. Also, add together the CSGP totals and the W-P (OED's Wagner-Peyser) count, and calculate what percentage the CSGP amount is to the total OED amount. Also record this on Tab F.

#### SHARED INFRASTRUCTURE:

6. Tab A – Record all facilities and operations costs. All infrastructure costs for the appropriate building will be captured from the current year budget. This will include such things as rent, parking, utilities, janitorial, maintenance and repairs, property insurance, security, etc. In addition, all operational costs will be entered, such as telephone, internet, IT costs, copiers, etc. The total of these costs will be divided by the number of square feet in the building for a cost per square foot.
7. Tab B – Determine space used by shared services and direct charge staff. Using the personnel listing in #1 above, calculate the total square footage for Shared Services staff and total for staff NOT providing Shared Services (Direct Charge). Information for the same person may be seen in both calculations (e.g., if one person occupies 100 square feet, and works 30% of their time in Shared Services, 30 sq ft would be seen in the Shared Services calculation, and the remaining 70 sq ft would be seen in Direct Charge).

8. Tab B (continued). To the above two sections, allocate the square footage to the appropriate funding source, and total the funding source columns in both the Shared Services and Direct Charge sections.
9. Tab B (continued). Multiply the per-square-foot charge to each funding source in each of the two sections to come up with total dollar amount per section per funding source.
10. Tab C – Account for all facilities square footage and dollars. Also multiply the per-square-foot charge to each of the Shared Services spaces (from the list in item #2 above), in order to add them to the two sections above in #7 to account for total square footage and facilities dollars.

#### **SHARED SERVICES STAFF**

11. Tab D – Determine shared services staff and associated funding source providing the staff. Using information gathered in item #1 above, record the total FTE in One Stop management staff and Career and Shared Services staff by funding source. In addition, record the total LOADED salary, benefits and other associated costs by funding source.
12. Tab E – Determine other shared costs. If there are any other costs to be shared by all funding sources, record them here (see #4 above).

#### **SUMMARY**

13. Tab G Step 1 – Verify all infrastructure costs to be shared. From the total Infrastructure costs calculated in #6 above, subtract the Direct Charge costs calculated in #7-9 above to arrive at the total Infrastructure costs to be shared by all partners.
14. Tab G Step 1 (continued) – Calculate CSGP portion of OED costs. Add together the total OED W-P Shared Services staff space and Direct Charge staff space (from #9 and 10 above) AND the total OED W-P Shared Services Staff (from #11 above), and multiply it by the CSGP percentage calculated in #5 above).
15. Tab G Step 1 (continued) – Calculate other shared costs. Add together the total staff costs (from #11 above) and any other costs (from #4 above), then SUBTRACT the result of the calculations from #14 above. This will result in Other Costs that will be shared by all partners.
16. Tab G Step 2 – Allocate all of the shared costs among funding sources. Multiply all Infrastructure costs by the percentages by funding source as determined in the first part of #5 above. Then also multiply all Other Shared Costs by the same percentages. Add those two totals together for the total cost by funding source (be sure that the grand total equals the total of all shared costs as determined by #15 above).
17. Tab G Step 3 – Determine all partner contributions. Determine the amounts contributed by each funding source by adding together any Infrastructure Costs, Staff Costs or Other Costs already paid by each funding source. These resulting amounts will be credited against amounts due by funding source.
18. Tab G Step 4 – Determine final amounts due from or to each funding source. To the amounts calculated in #16 and #17 above, add the Other Charges by funding source (as determined in #8-10 above). In addition, add the CSGP charge (as determined in #14 above) to the OED W-P total.



**SIGNATURES**

*Rick Dyer*

09/07/17

Rick Dyer Date  
County Commissioner  
Jackson County Board of Commissioners

*Daniel E. DeYoung*

09/07/17

Dan DeYoung Date  
County Commissioner  
Josephine County Board of Commissioners

*Jessica Gomez*

09/01/17

Jessica Gomez Date  
Chair, Rogue Workforce Partnership  
CEO & Founder, Rogue Valley Microdevices

Jim Pfarrer Date  
Division Director Workforce Operations  
Oregon Employment Department

*Rosemary Jernigan*

09/06/17

Rosemary Jernigan Date  
Assistant Self Sufficiency Program Manager  
Oregon Department of Human Services

*Matthew Balkwill*

09/07/17

Matthew R. Balkwill, Branch Manager Date  
Oregon Vocational Rehabilitation

*Curtis Sommerfeld*

09/05/17

Holley Oglesby Date  
Deputy Procurement Officer  
Higher Education Coordinating Commission

Curtis Sommerfeld Date  
Vice President of College Services  
Rogue Community College – Perkins CTE

Catherine Todd Date  
Director of Workforce Solutions  
Easter Seals Oregon

Rich Nannini Date  
Project Director  
DESI/Job Corp

*Jason Elzy*

09/07/17

Jason Elzy Date  
Executive Director  
Housing Authority of Jackson County

*Dacia Johnson*

09/07/17

Dacia Johnson Date  
Executive Director  
Oregon Commission for the Blind



**TITLE: ONE STOP CAREER SERVICES**

**Purpose:**

To communicate the career services required to be provided in a comprehensive one-stop center by required One Stop partners.

**Reference:**

Code of Federal Regulations:

678.425

678.430

678.435

679.560

680.170

Section 134 (C)(2) of the Workforce Innovation and Opportunity Act (WIOA)

**Requirements:**

- (1) The applicable career services to be delivered by required one-stop partners are:
  - (a) **Basic career services** that must be made available, and at a minimum, must include the following services, as consistent with allowable program activities and Federal cost principles:
    1. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
    2. Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system. For the TANF program, States must provide individuals with the opportunity to initiate an application for TANF assistance and non-assistance benefits and services, which could be implemented through the provision of paper application forms or links to the application website.
    3. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and support service needs;
    4. Labor exchange services, including
      - i. Job search and placement assistance, and when needed by an individual, career counseling, including
        - A. Provision of information on in-demand industry sectors and occupations (as defined in Sec. 3(23) of WIOA); and
        - B. Provision of information on nontraditional employment; and provision of information on nontraditional employment
      - ii. Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system;
    5. Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and when appropriate, other workforce development programs;



6. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including—
  - i. Job vacancy listings in labor market areas;
  - ii. Information on job skills necessary to obtain the vacant jobs listed; and
  - iii. Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs;
7. Provision of performance information and program cost information on eligible providers of education, training, and workforce services by program and type of providers;
8. Provision of information, in usable and understandable formats and languages, about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;
9. Provision of information, in usable and understandable formats and languages, relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: Child care; assistance available through the State's Health Insurance program; benefits under SNAP; assistance through the earned income tax credit; and assistance under a State program for TANF, and other supportive services and transportation provided through that program;
10. Provision of information and meaningful assistance to individuals seeking assistance in filing a claim for unemployment compensation,
  - i. "Meaningful assistance" means:
    - A. Providing assistance on-site using unemployment compensation claims filing and the rights and responsibilities of claimants; or
    - B. Providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
  - ii. The costs associated in providing this assistance may be paid for by the program, or the WIOA adult or dislocated worker programs, or some combination thereof.
11. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.

(b) **Individualized career services** must be made available if determined to be appropriate in order for an individual to obtain or retain employment. These services include the following services, as consistent with Federal cost principles:

1. Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include
  - i. Diagnostic testing and use of other assessment tools; and
  - ii. In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals;
2. Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of and information about the eligible training providers
3. Group counseling;
4. Individual counseling;
5. Career planning
6. Short-term pre-vocational services including development of learning skills, communication skills, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training;

7. Internships and work experiences that are linked to careers (as described in CFR 680.170);
8. Workforce preparation activities;
9. Financial literacy services as described in Sec. 129(b)(2)(D) of WIOA
10. Out-of-area job service assistance and relocation assistance; and
11. English language acquisition and integrated education and training programs.

(c) **Follow-up services** must be provided as appropriate, including: counseling regarding the workplace, for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment, for up to 12 months after the first day of employment.

(d) In addition to the requirements in paragraph (a)(2) of this section, TANF agencies must identify employment services and related support being provided by the TANF program (within the local area) that qualify as career services and ensure access to them via the local one-stop delivery system.

(2) Business Services Provided Through the One-Stop:

- (a) Certain career services must be made available to local employers, specifically labor exchange activities and labor market information. Local areas must establish and develop relationships and networks with larger and small employers and their intermediaries. Local areas also must develop, convene, or implement sector partnerships.
- (b) Customized business services may be provided to employers, employer associations or other such organizations. These services are tailored for specific employers and may include:
  1. Customized screening and referral of qualified participants in training services to employers;
  2. Customized services to employers, employer associations, or other such organizations, on employment-related issues;
  3. Customized recruitment events and related services for employers including targeted job fairs;
  4. Human resource consultation services, including, but not limited to assistance with:
    - i. Writing/reviewing job descriptions and employee handbooks;
    - ii. Developing performance evaluations and personnel policies;
    - iii. Creating orientation sessions for new workers;
    - iv. Honing job interview techniques for efficiency and compliance;
    - v. Analyzing employee turnover;
    - vi. Creating job accommodations and using assistive technologies; or
    - vii. Explaining labor and employment laws to help employers comply with discrimination, wage/hour, and safety/health regulations;
  5. Customized labor market information for specific employers, sectors, industries or clusters; and
  6. Other similar customized services.
- (c) Local areas may also provide other business services and strategies that meet the workforce investment needs of area employers, in accordance with partner programs' statutory requirements and consistent with Federal cost principles. These business services may be provided through effective business intermediaries working in conjunction with the Local WDB, or through the use of economic development, philanthropic, and other public and private resources in a manner determined appropriate by the Local WDB and in cooperation with the State. Allowable activities, consistent with each partner's authorized activities, include, but are not limited to:

1. Developing and implementing industry sector strategies (including strategies involving industry partnerships, regional skills alliances, industry skill panels, and sectoral skills partnerships);
  2. Customized assistance or referral for assistance in the develop of a registered apprenticeship program;
  3. Developing and delivering innovative workforce investment services and strategies for area employers, which may include career pathways, skills upgrading, skill standard development and certification for recognized postsecondary credential or other employer use, and other effective initiatives for meeting the workforce investment needs of area employers and workers;
  4. Assistance to area employers in managing reductions in force in coordination with rapid response activities and what strategies for the aversion of layoffs, which may include strategies such as early identification of firms at risk of layoffs, use of feasibility studies to assess the needs of and options for at-risk firms, and the delivery of employment and training activities to address risk factors;
  5. The marketing of business services to appropriate area employers, including small and mid-sized employers; and
  6. Assisting employers with accessing local, State, and Federal tax credits.
- (d) All business services and strategies must be reflected in the local plan described in 20 CFR 679.560(b)(3).

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		268		731
Customer Enrollments	2034		2329		2928		1594		8885
Customers Who Got a Job	2,284		1,793		2,368		1,505		6,445
Referral to Hire Ratio	7.23		3.30		3.92		3.49		4.49
Customers Who Accessed Foundational Skills Workshops	579		477		658		377		1714
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: 1,994.18

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

# ROGUE WORKFORCE PARTNERSHIP (RWP) DASHBOARD

High Level

High Level							
Goal 1: Continue building our Sector Strategies partnerships	Business Services	Job listings closed (Basic/Enhanced)	OE 9/30/16	OE 12/31/16	OE 3/31/17	OE 6/30/17	YTD Total
Training Investments (Sector Strategies Industries/In-Demand Sectors)		Percentage of closed listings that result in a hire	112	98	146	229	585
		Percentage of On-the-Job Training Completers	40%	55%	60%	46%	50%
		Percentage of Occupational Skills Training Completers	92%	95%	88%	95%	90
		Percentage of Occupational Skills Training Completers	100%	100%	100%	100%	100%
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	2,368	1,505	6,445
		Percentage of customers who registered within a year	98%	96%	90%	91%	94%
		Percentage of customers who completed Welcome Process within a year	83%	80%	85%	80%	82%
		Number of new business engagements	22	81	360	268	739
	Business Services	Number of job listings entered Self-Referral	2,358	2,277	2,437	2,710	9,814
		Number of job listings entered Basic/Enhanced	113	105	188	187	603
	Training Investments (all)	Percentage of On-the-Job Training Completers	72%	83%	59%	77%	90
		Percentage of Occupational Skills Training Completers	88%	93%	68%	85%	106
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
		Number of staff referrals in response to job listings	376	231	522	356	1485
	Business Services	Referral to hire ratio (Staff Only)	7.23	3.3	3.92	3.49	4.49
		Percentage of closed listings that resulted in a hire (Self)	2.4%	2.2%	0.8%	0.1%	1.4%
		Percentage of closed listings that resulted in a hire (Staff)	40.0%	57.0%	60.0%	46.0%	50.8%
		Business Satisfaction (Overall Quality of Service % Rated Excellent or Good)	77%	78%	84%	79%	80%
		Quality of hire: retention					TBD
		Accelerate Career Momentum: Create opportunity for individuals who are currently underemployed to move up in their career path:					
	Training Investments	Percentage of On-the-Job Training Completers	13%	11%	19%	46%	24
		Percentage of Occupational Skills Training Completers	53%	48%	20%	83%	27
		On-the-Job Training completers employed by placement employer 90 days after training	84%	77%	40%	30%	58%
	Assessments/Certifications	NCRC (unduplicated)	161	175	284	157	777
		Office Proficiency Assessment Certification (unduplicated)	34	18	24	16	92
	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	Skill Building/Career Exploration Activities	Career X (started)	9	4	4	10
Career X (completed)			7	0	1	5	13
Career X (% completed)			78%	0%	25%	50%	48%
Work-Based Learning		Percentage of work experience training completers	68%	100%	50%	83%	70
		Number of WEX (Work Experience) Completers	19	22	13	11	65
		Number of OJT Completers	0	1	3	1	5
		Youth Crew Completers	5	7	1	5	18
College and Careers for all		Industry Tours					
		Internships					
		Career Days (e.g., Careers in Gear, GP Career Fairs, RCC STEM Connections, etc.)	See CC4A Biennial Report				