








Rogue Workforce Partnership - Corporate Directors Meeting

Thursday October 19, 2017 • 3:00-5:00 p.m. | 100 E. Main Street, Suite A - Board Room • Medford

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Agenda


3:00 p.m.	Call to Order (1-2m) <ul style="list-style-type: none">▸ Welcome & Introductions	Jessica Gomez
	Approval of Minutes (1-2m) - Action Item  <ul style="list-style-type: none">▸ July 20, 2017 - RWP Corporate Directors Meeting▸ August 17, 2017 – RWP Corporate Directors Meeting▸ August 30. 2017 – RWP Corporate Directors Special Meeting	Jessica
	Approval of Policies (15-20m) - Action Item  <ul style="list-style-type: none">▸ WIOA Adult/Dislocated Worker Documentation & Eligibility▸ WIOA Youth Eligibility & Enrollment▸ WIOA Sub-Recipient Monitoring▸ Revision to WIOA Adult/Dislocated Worker Incumbent Worker	Aurora King, Sherri Emitte
3:20 p.m.	Funding K-12 Education Coordination Capacity (15m) <ul style="list-style-type: none">▸ Update on SOESD Planning & Direct Outreach to School Districts / Superintendents	Jim Fong
3:35 p.m.	State General Funds & Investment Strategy (20-30m)  <ul style="list-style-type: none">▸ Competitiveness Strategies▸ Industry Engagement▸ Work Experiences	Jim
4:05 p.m.	Agenda Prep January Workforce Development Board Retreat (30m) <ul style="list-style-type: none">▸ Facilitator Options▸ Key Decisions / Feedback needed▸ Preliminary Design & Topics	All
4:35 p.m.	Southern Oregon Success (10)  <ul style="list-style-type: none">▸ Metrics for Community / Economic Well-Being & Vitality – <i>Brainstorming Next Steps</i>	Jim

4:45 p.m. **RWP Membership** (10-15m)  Jim
Labor Representatives - *new nomination & our options on RWP configuration*
 ▸ New Business Representative - *update & next steps*

4:55 p.m.	Conflict of Interest Discussion (5m)	All
	Training Investment Criteria	

Other Items Jessica

5:00 p.m.	Adjourn	Jessica
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 = Documents attached or will be handed out at meeting

Auxiliary aids and services are available upon request to individuals with disabilities.

Please contact Tami Allison at (541) 842-2518

tamia@rogueworkforce.org



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

July 20, 2017 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Commissioner Rick Dyer
Vice-chair, Michael Donnelly
Nikki Jones
Shawn Hogan (via phone)
John Underwood
Paul Macuga

MEMBERS ABSENT

Commissioner Dan DeYoung
Chairperson, Jessica Gomez

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Director of Administration, Rogue Workforce Partnership (via phone)
Aurora King, Chief Operating Officer, Rogue Workforce Partnership
Julie Gillis, Senior Projects Manager, Rogue Workforce Partnership
Tami Allison, Senior Projects Manager, Rogue Workforce Partnership

Quorum Present: Yes

(Note: This meeting was scheduled as a special joint meeting for the RWP Corporate Directors and the Rogue Valley Workforce Consortium. A quorum was not available for the Rogue Valley Workforce Consortium. The actions they would have taken have been deferred and will be taken at a separately scheduled meeting on August 2, 2017.)

1) Call to Order

The meeting was called to order by Vice-Chair, Mike Donnelly at 3:04p.m. Introductions were made.

2) Approval of Minutes

COMMISSIONER DYER MOVED TO APPROVE THE MINUTES OF THE May 18, 2017 RWP CORPORATE DIRECTOR'S MEETING. THE MOTION WAS SECONDED BY PAUL MACUGA AND APPROVED UNANIMOUSLY.

3) FINANCE - RWP BUDGET REVIEW & APPROVAL

Sherri Emitte reviewed the revenue and expenditures with the Corporate Directors reporting that revenues and expenditures are at \$4,347,501, a decrease of \$787,855 from last year. More details were shown in the PY 17 Budget memo presented to the Corporate Directors.

Jim responded to an inquiry from Mike Donnelly requesting a review of the REACH Grant by reporting that the funding for the REACH grant came from funding that was approved to improve the welfare-to-work program. It was an opportunity to try human-centered design serving 165 families in post-secondary education opportunities. The average wage goal of \$12.39 per hour was exceeded ending at an average wage of \$13.94 per hour, with many participants experiencing success and continuing their education beyond REACH. Currently there are 55 graduates with an expectation of another 30 that will continue over the summer and be graduated in September. The goal is to track participants for five years and are in current conversations with OED to be able to track wages over this same period of time.

Because this grant is being absorbed into the direct DHS grant with ResCare, Nikki inquired whether it will continue with the same model or absorbed into regular DHS programs? Aurora indicated that DHS is committed to retaining the program model as intended.

A MOTION WAS MADE BY NIKKI JONES TO APPROVE THE BUDGET AS PRESENTED. THE MOTION WAS SECONDED BY COMMISSIONER DYER AND APPROVED UNANIMOUSLY.

4) RWP Program Policies

The following policies are required for the implementation of the Workforce Investment and Opportunity Act (WIOA) federal legislation.

OJT Policy – This policy is being revised to incorporate requirements under WIOA and the change in the minimum wage, increasing to \$10.25 per hour. Aurora went on to say that we want to create entry level opportunities as well as serving current workers, and we want to look at more creative ways to help workers as well as businesses work together to problem solve growth and development to increase the median wage in our area; as well as looking at how to get more creative and inviting with non-traditional workers who are willing to work hard and stay and grow with the company.

Priority of Service – Aurora noted that there is a much longer list of populations who fall into priority of service. Nikki Jones asked whether there is data regarding success of ex-offenders (who are on this priority of service list). Nikki noted that it remains a struggle working with companies who do not have a policy regarding convictions – companies that are hiring the most and have the best success are the ones who are not requiring background checks.

Aurora reported that she recently met with Jackson County Probation and there has been a Talent Development Specialist assigned to work with this population at WSRV – Bartlett.

One-Stop Center Certification Policy – Jim reported that this policy was generated directly from the state policy with a very large piece of it being the self-evaluation tool.

A MOTION WAS MADE BY JOHN UNDERWOOD TO APPROVE THE POLICIES AS PRESENTED. THE MOTION WAS SECONDED BY COMMISSIONER DYER AND APPROVED UNANIMOUSLY.

5) RWP NEW MEMBER APPOINTMENTS RECRUITMENT

Jim handed out a revised membership and position roster. Commissioner Dyer indicated that he spoke with Colleen Padilla of SOREDI about moving in a different direction for our economic development representative, and that she was amicable to that change. Jim has met with Alex Campbell, Coordinator with the Governor's Regional Solutions Team who has indicated that he is interested in joining the workforce board, has a background in Economic Development, and is a member of the Governor's staff. Jim added that with the expiring terms of Fred Holloway and Scott Koch as of June 30, 2017 we are currently at 25 members with one of those positions being vacant.

A MOTION WAS MADE BY NIKKI JONES TO APPROVE THE RECOMMENDATION OF ALEX CAMPBELL TO THE ROGUE VALLEY WORKFORCE CONSORTIUM FOR APPOINTMENT TO THE WORKFORCE DEVELOPMENT BOARD. THE MOTION WAS SECONDED BY JOHN UNDERWOOD AND APPROVED UNANIMOUSLY.

6) MOU, COST SHARING & ONE-STOP OPERATOR UPDATE

Jim reported that only one proposal was received in response to the One-Stop Operator RFP. Although the RFP was written to allow for cost, no cost, consortium, or single entity proposals, a Consortium could not be reached and ResCare submitted as a single entity. Jim noted that the consensus was that ResCare was not experienced enough, as a single entity, to be the One-Stop Operator; and, in talking with the State, we are required to have the RFP posted for 30 days. The RFP will be revised and it will be posted again for the required 30 days. Jim added that we are required by have a One-Stop Operator in place by September 1, 2017.

7) STRATEGIC PLAN GOALS

The workforce board, at their June meeting, gave direction for metrics and goals. The suggestion from Chair Jessica Gomez is to have a strategic planning session on how to prioritize the work moving forward. The board members agreed that this work needs to be a facilitated process in a dedicated amount of time. The Corporate Directors will continue to work on details for scheduling such an event.

8) EXECUTIVE SESSION

The Corporate Directors entered into Executive Session to consult with counsel concerning legal rights and duties regarding current litigation or litigation likely to be filed. ORS 192.660 (2) (h). Executive Session ended at 4:35 p.m. and the Corporate Directors continued with the regular meeting.

9) OTHER ITEMS

Jim presented a flyer for the National Governor's Association 2017 Summer Conference.

No further items were brought before the RWP Corporate Directors.

10) Adjourn

With no further business, the RWP Corporate Directors meeting was adjourned at 4:45 p.m.

Respectfully Submitted,

Tami Allison
Senior Projects Manager

Approved
Jessica Gomez, RWP Chair

Date



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS ♦ MEETING MINUTES
August 17, 2017 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Commissioner Rick Dyer
Chairperson, Jessica Gomez
Shawn Hogan

MEMBERS ABSENT

Commissioner Dan DeYoung
Vice-Chair, Mike Donnelly
Nikki Jones
John Underwood
Paul Macuga

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Aurora King, Chief Operating Officer, Rogue Workforce Partnership
Julie Gillis, Senior Projects Manager, Rogue Workforce Partnership
Tami Allison, Senior Projects Manager, Rogue Workforce Partnership

Quorum Present: No

1) Call to Order

The meeting was called to order by Director Shawn Hogan at 3:08 p.m. Introductions were made.

2) Approval of Minutes

Due to the lack of a quorum, the minutes of the July 20, 2017 RWP Corporate Director's Meeting will be deferred to the next meeting scheduled for October 19, 2017.

3) Partnership Coordination & Planning Sector Strategies Budget for this Biennium

Scott Beveridge, Superintendent, Southern Oregon Education Service District joined the meeting by phone to add perspective to the game plan for managing steps forward with partners (*K-12 Superintendents, College Presidents, RWP Corporate Directors, Business-Education Partnerships, SOREDI*) to get to resolutions/next steps on:

- CC4A – CRLE staff funding
- Governance alignment / streamlining

Discussion took place on the need to streamline the different structures that are currently meeting as members of various boards / committees overlap, and there seems to be the opportunity to connect the Business Education Partnership to the other structures already in place to synergize, create, and condense into one unified movement.

Further discussion took place around funding for the RWP Business Service Manager dedicated to supporting the College and Career for All work with K-12 school districts, and options for asking school districts to contribute to the funding of this position rather than being faced with the choice point of funding out of already diminishing sector dollars. Jessica stated that we don't want to lose the capacity that this position brings. Jim will keep the Corporate Directors posted on this issue between now and the next meeting.

Jim also reported that we are experiencing some misalignment with SOREDI on an operational level. The biggest concern is the fragmented communication with businesses. He has a meeting scheduled with Executive Director, Colleen Padilla on Monday August 21, 2017, as well as with Commissioner Rick Dyer later that same day to discuss.

4) Details / Scheduling of Retreat

The group discussed options for having a workforce development board retreat. The following decisions were made:

- Cancel the December RWP Workforce Development Board meeting
- Send out a Doodle Poll listing January 12 and January 19, 2018 - 8 am – 1 pm as options for the retreat.

More information and details will be coordinated at a later date.

5) Agenda Prep for September RWP -Workforce Development Board Meeting

The group brainstormed agenda items for the September workforce development board meeting.

- Healthcare Video
- Healthcare Workforce Steering Committee Survey Information
- Policies
- One-Stop Operator Procurement Results
- MOU Update – give a 15 minute history of what's new and how we feel we can deliver better services to our customers.

6) OTHER ITEMS

No further items were brought before the RWP Corporate Directors.

7) Adjourn

With no further business, the RWP Corporate Directors meeting was adjourned at 5:02 p.m.

Respectfully Submitted,

Tami Allison
Senior Projects Manager

Approved	Date
Jessica Gomez, RWP Chair	



MINUTES

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

August 30, 2017 ♦ 100 E. Main St., Suite A - Board Room ♦ Medford, OR

MEMBERS PRESENT

Commissioner Rick Dyer (via videocall)
Michael Donnelly (via videocall)
Nikki Jones (via videocall)
Jessica Gomez (via videocall)
Shawn Hogan (via videocall)
Paul Macuga (via videocall)

MEMBERS ABSENT

Commissioner Dan DeYoung
John Underwood

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Director of Administration & Finance, Rogue Workforce Partnership (via videocall)
Aurora King, Chief Operating Officer, Rogue Workforce Partnership
Tami Allison, Senior Project Manager, Rogue Workforce Partnership

Quorum Present: Yes

1) Call to Order

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

2) One-Stop Operator Selection – Action Item

Jim Fong informed the Corporate Directors that one proposal was submitted in response to the RWP's Request for Proposal to serve as the One-Stop Operator for the Rogue Valley region. This proposal was submitted by the Oregon Manufacturing Extension Partnership.

A consortium of local partners were not able to reach the required 3-member minimum, so we did not receive a proposal from either a consortium or any of the other local workforce partners.

OMEP's particular expertise is in helping organizations apply "Lean enterprise thinking and tools, particularly Value Stream Mapping 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."

OMEP has had a long-standing series of partnerships with Local Workforce Boards throughout the State of Oregon. They have previously applied Value Stream Mapping in the WorkSource Portland Metro One-Stop Centers, and have also just recently been selected as the One-Stop Operator for five other Workforce Regions in Oregon – Clackamas, Mid-Willamette (Salem), Northwest Coastal, Lane, and East Cascades.

Because of our strong Local Leadership Team of service partners, staff feel that contracting with OMEP to serve as the One-Stop Operator will add value and benefit to improving the service delivery in our workforce centers and system.

Based on the expertise and experience of OMEP, and the value they can bring in serving in the role of One-Stop Operator, staff recommended that the RWP-Corporate Directors approve the selection of OMEP as the One-Stop Operator, and authorize staff to negotiate and enter into a contract with them. This decision will require an affirming ratification vote from the full RWP – Workforce Board at the September 14th meeting.

COMMISSIONER DYER MOVED TO APPROVE THE SELECTION OF THE OREGON MANUFACTURING EXTENSION PARTNERSHIP AS THE ROGUE VALLEY REGION’S ONE-STOP OPERATOR, AND TO AUTHORIZE STAFF TO NEGOTIATE AND ENTER INTO A CONTRACT WITH OMEP FOR UP TO A MAXIMUM OF \$35,000. THE MOTION WAS SECONDED BY PAUL MACUGA AND APPROVED UNANIMOUSLY.

3) RWP Meeting & College & Career for All

The CRLE Pyramid (*see attached diagram*) is a model for creating a regional business-education partnership framework for Career Related Learning Experiences for high school students. After doing much leg/prep work over the past many months, staff and key regional education partners think it’s now timely to propose that cross-sector partners adopt this as a regional model. The proposal is to add this as an agenda item to the September 14th RWP – Workforce Board meeting, and invite more K-12 Superintendents, and informal education and other industry sector partners to participate in order to build a broad-based regional consensus.

We also want to cross-walk this discussion and decision-making process with all the K-12 Superintendents at their regular SOESD Superintendents meeting on September 18th. RWP Corporate Directors expressed strong support for moving in this direction. Suggestions were made to add to the CRLE Pyramid slide, including:

- Mike suggested adding a slide on the CRLE activities currently occurring and also those that could be outside the model

- Shawn suggested adding a slide listing what the issues are such as different districts approaching the work with students differently, and why this would be a better approach
- Jessica suggested that it would be beneficial to have industry leaders such as Mike, Shawn and herself speak to why this would be important to them as business leaders to have a coordinated structure and have industry help train the next generation of the workforce.

There was consensus to move forward in this direction.

4) Executive Session

- Entered in to Executive Session at 3:47 p.m.
- Exited Executive Session at 3:52 p.m.

5) Other Items

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

6) Adjourn

With no further business, the RWP Corporate Directors meeting was informally adjourned at 3:52 pm.

Respectfully Submitted,

Tami Allison
Executive Projects Manager

Approved	Date
Jessica Gomez, RWP Chair	



DATE: October 12, 2017

TO: Rogue Workforce Partnership – Corporate Directors

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
Wagner-Peyser	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
Adult	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 ¹ Training Services ²	I-Trac
Dislocated Worker (DW)³	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.		

¹ 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.

² 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.

³ 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: October 12, 2017

TO: Rogue Workforce Partnership – Corporate Directors

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.

Approved: _____
Jessica Gomez, RWP Chair

Date: _____



ACTION BRIEF

DATE: October 12, 2017

TO: Rogue Workforce Partnership – Corporate Directors

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: October 12, 2017

TO: Rogue Workforce Partnership – Corporate Directors

FROM: Aurora King, Chief Operating Officer

SUBJECT: Revision to WIOA Adult/Dislocated Worker Incumbent Worker Training Policy

BACKGROUND

Rogue Workforce Partnership (RWP) expects sub-recipients funded with Adult and Dislocated Worker Workforce Innovation and Opportunity Act (WIOA) funds to provide Incumbent Worker Training (IWT) service activities for incumbent workers in Jackson and Josephine Counties.

Per WIOA Section 134(d) (4) of the WIOA and 20 CFR 680.800, Local Workforce Development Boards may reserve and use up to 20 percent of the funds allocated to the local area for incumbent worker training programs. Governing guidelines also include federal statutes, as well as applicable state and local funding stream requirements for Incumbent Worker Training.

RWP sub-recipients may use funds for training designed to meet the special requirements of an employer (or group of employers) to retain a skilled workforce or avert the need to lay off employees. This will be accomplished by assisting workers in obtaining the skills necessary to retain employment, and conducted with a commitment by the employer to retain or avert laying off incumbent workers that are trained in order to increase the competitiveness of the employee or/or employer.

SUMMARY

RWP Staff would request that the Workforce Development Board approve the attached Incumbent Worker Training Policy.



TITLE: INCUMBENT WORKER TRAINING

Purpose

To provide guidance for sub-recipients of Adult and Dislocated Worker Workforce Innovation and Opportunity Act (WIOA) funds to provide Incumbent Worker Training (IWT) service activities for incumbent workers in Jackson and Josephine Counties.

Requirements

Per Section 134(d) (4) of the WIOA and 20 CFR 680.800, Local Workforce Development Boards may reserve and use up to 20 percent of the funds allocated to the local area for incumbent worker training programs. Governing guidelines also include federal statutes, as well as applicable state and local funding stream requirements for Incumbent Worker Training.

References

Workforce Innovation and Opportunity Act Section 134 (d) (4)
20 CFR 680.800
TEGL 19-16

Policy

Rogue Workforce Partnership sub-recipients may use funds for training designed to meet the special requirements of an employer (or group of employers) to retain a skilled workforce or avert the need to lay off employees. This will be accomplished by assisting workers in obtaining the skills necessary to retain employment, and conducted with a commitment by the employer to retain or avert laying off incumbent workers that are trained in order to increase the competitiveness of the employee and/or employer.

When determining eligibility, sub-recipients shall take into account:

- The characteristics of the potential participants in the program (e.g., individuals with barriers to employment);
- Whether the training improves the labor market competitiveness of the employees or both the employees and the employer; and

Other factors the Rogue Workforce Partnership Local Workforce Development Board may consider appropriate, such as:

- The number of employees participating in the training;
- The wage and benefit levels of those employees at present and anticipated upon completion of the training (both pre- and post-training);
- The existence of other training resources and advancement opportunities provided by the employer;
- Credentials and skills gained as a result of the training;
- Layoffs averted as a result of the training;
- Utilization as part of a larger strategy and/or career pathway strategy; or
- Employer size

For an employer to receive IWT funds, the individual(s) receiving training must:

- Be employed;
- Meet the Fair Labor Standards Act requirements for an employer-employee relationship; and
- Meet the employment history requirement, which includes an established employment history with the employer for 6 months or more (which may include time spent as a temporary or contract worker performing work for the employer receiving IWT funds).

There is one exception to the six month requirement: In the event that incumbent worker training is being provided to a cohort of employees, not every employee in the cohort must have an established employment history with the employer for six months or more, as long as the majority of those employees being trained meet the employment history requirement.

Whenever possible, the Rogue Workforce Partnership will work to cultivate opportunities to support employers in their efforts to develop a more competitive workforce or avert potential layoffs as part of a broader layoff aversion strategy.

Employers participating in the program carried out under this policy shall be required to pay for the non-Federal share of the cost of providing the training to incumbent workers of the employers. The Rogue Workforce Partnership shall establish the non-Federal share of such cost (taking into consideration the factors listed in the previous paragraph). The non-Federal share shall not be less than:

- 10 percent of the cost, for employers with not more than 50 employees;
- 25 percent of the cost, for employers with more than 50 employees, but not more than 100 employees; or
- 50 percent of the cost, for employers with more than 100 employees.

The calculation of the non-Federal share provided by an employer participating in the program may include the amount of the wages paid by the employer to a worker while the worker is attending a training program funded through WIOA. The employer may provide the share in cash or in-kind, and is to be fairly evaluated by Rogue Workforce Partnership. The employer's share must be reported on the quarterly ETA-9130 financial report.

Preference will be given to incumbent worker trainings that fall within these categories:

- Companies who utilize the "upskill/backfill strategy," which means filling jobs vacated by workers who are moving into more advanced positions in the company with other WIOA participants;
- A training that is in an in-demand industry sector or occupation (demonstrated by labor market information) that has a substantial current or potential impact through jobs that lead to economic self-sufficiency and opportunities for advancement;
- A training that skills up individuals who work within the local region's sector strategy industries, which include Advanced Manufacturing, Information Technology, Electronic Commerce, Healthcare.

Approved: _____

Jessica Gomez, RWP Chair

Date: _____

Tami Allison

From: HUMELBAUGH Karen M * CCWD <Karen.M.HUMELBAUGH@oregon.gov>
Sent: Friday, September 01, 2017 7:26 PM
To: Andrew McGough; Bridget Dazey; Heather DeSart; Heather Ficht; Bill Rosholt; Jim Fong; Jake McClelland; PAYNE Kristina; Kim Parker-Llerenas
Cc: K Litvin; HODGSON Shalee * OED; TACKMAN Kurt R * CCWD; WELTER Debra A * CCWD; BARCLAY Jordana * OED; SOTO Rachel * CCWD; WILCOX Kathy * CCWD; DENNING Jennifer L * CCWD; ASHER John E * CCWD; NELL Todd A * CCWD; PIRTLE-GUINEY Elana * GOV; FITZGERALD Theresa * CCWD; FANNO Wayne L * CCWD; DICKINSON Kelly D * CCWD; MARTIN Clay * CCWD; MCCOY Michael D * CCWD
Subject: 2017-19 General Fund Allocations
Attachments: 2017-19 General Fund Narrative.docx; 2017-2019 General Fund Allocations.xlsx

All-

As you know, not only was the 2017 WIOA funding reduced, but the 2017-19 Workforce General Fund received by the Higher Education Coordinating Commission was cut by the legislature. These combined cuts have resulted in a much needed analysis of how we allocate and distribute all funds. Historically, Workforce General Funds were divided based on decisions made during times of economic downturn, prior to the implementation of WIOA and when Oregon only had seven local boards. Analysis was provided by HECC and OED staff, feedback from OWIB business members and Governor's Office input. We all understand that this is just a first step in assuring that these General Funds are appropriated equitably and for the continued purposes the legislature designates.

Both the WIOA Formula and the General Fund allocation methodology will be reviewed by the OWIB Continuous Improvement Committee over the next 9 months. OWP has membership on that Committee (Heather D., Heather F.), but conversations will also be brought to the full OWP table as the dialogue continues.

As I reviewed the combined analysis and recommendations there were variances in 2015-17 to 2017-19 allocations that were as much as 60% reductions and 700% increases. With an overall cut in the General Fund of 16%, no matter how we looked at factors, there were losses. The biggest 'correction' made was to the Work Experiences portion of the funds. In the past, the number of OJTs was completely arbitrary and determined based on decisions made by a group of individuals who volunteered for a random number of OJTs three biennia ago. We needed to apply some consistent formula, but all of the options resulted in 70% cuts for some boards. For this interim biennium we chose an average of the past allocation with a formula based on the WIOA percentages that are commonly the base for any additional funds distributed.

In addition to adjusting the formulas, we looked at how to best support our current economy, OWIB Strategic Plan and governor's priorities. The names and requirements for each of the pots has become more flexible in definition, but also will contain specific benchmarks and pay points. In order to reduce your administrative burden for these funds, they will now all be part of one contract with three subsections with deliverables. This should make modifications, redistribution of funds and other adjustments simpler and quicker.

The new General Fund contracts will have three components: Local Competitiveness Strategies (formerly Board Support), Work Experience (formerly Back to Work Oregon) and Industry Engagement (formerly Sector Partnerships). A brief description of each of these funds is in the attached Word document. The methodology and formulas for each of the funds along with the totals can be found in the Excel spreadsheet. There are five tabs in the Spreadsheet- one for each of the three components, one with the total state and board impacts and a final tab with factors used for geography and poverty. You may notice that the totals exceed the \$7.6 million of General Fund by \$129,324. This additional amount will be provided via appropriate federal WIOA Reserve funds.

The HECC Procurement Office has this information and will begin the contracting process. Hopefully, this email and attachments will assist with your overall biennial planning as we work through the contracting process.

If folks are interested, I am happy to have a 30 minute call early next week to walk you through the methodologies and logic. If this type of group activity isn't needed or won't work, I am sure many of you will have individual comments, concerns, complaints etc.. Please direct those my way and I will make them my top priority this week.

I appreciate your patience in this process and look forward to the continued dialogue about system sustainability despite our continued reductions in funding.

Thanks, k

KAREN M. HUMELBAUGH
Director, Office of Workforce Investments
503.551.9322

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

Messages to and from this e-mail address may be available to the public under Oregon law

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2017-2019 General Fund Breakdown and Descriptions

Local Competitiveness Strategies \$2.12 million

These funds are intended to assist in supporting boards as they effectively manage programs and business engagement. Local boards generally reserve the full 10% of Administrative funds allowable and 10% of their combined Program dollars for the purposes of supporting the board and its strategic plan and strategies and this is once again considered in the formula.

General Funds in the form of Local Competitiveness Strategies are a mechanism available to help with financial stability and operations to maintain board sustainability. Local Boards whose total 20% Reserve is less than \$500,000 receive a differential to bring them to that minimal level. In addition to this factor, square mileage of the local area and poverty rate add in small increases.

It is important to note that these funds are less than a board needs to cover both years of the biennium so boards need to look strategically at their overall funding in order to remain sustainable.

Reporting requirements for Board Support will include:

- Implementation of the Work Source Operational standards
- Local Board Assessments with clear deliverables towards progress on areas for improvement
- Clear business engagement.

Work Experience - \$4 million

Work Experience funding is an average of the 2015-17 Back to Work Oregon allocation amounts and the 2017 WIOA formula. All Work Experiences are averaged at \$4,500, creating the total numbers.

Of total Work Experience funds 50% must be used for On-the-Job Training (formerly Back to Work Oregon) and 50% can be used for other work experience or training programs including customized training, incumbent worker training, apprenticeship related training and work experience or internship programs. The utilization of these funds will be analyzed mid-biennium and funds may be redistributed based on performance.

Program requirements for On-the-Job Training will include:

- 50% of enrolled participants will be placed in a targeted sector as identified by the board
- 50% of enrolled participants will be made up of SNAP/TANF participants
- 50% of enrolled participants will earn an NCRC
- Participants must be at least 18 years old
- Participants must be unemployed
- Requires 1:1 service match (Federal, State, or Local funds)
- Success stories will be required

The remaining 50% of the Work Experience funds can be used for any mix of the following activities:

- Customized Training
- Incumbent Worker Training
- Apprenticeship Related Training
- work experience
- youth's first job
- Internships
- On-the-Job Training

Of these participants:

- 50% must be placed in a priority sector, identified by the board.
- 50% of participants must be TANF/SNAP recipients

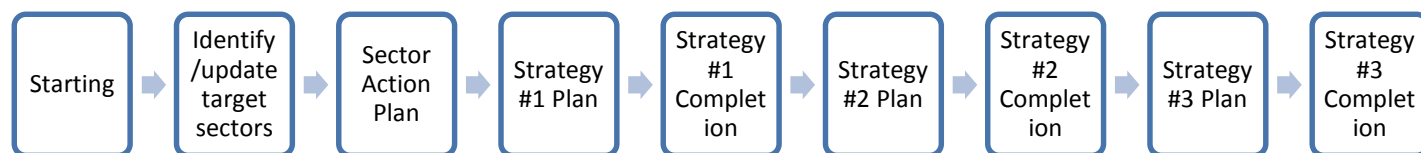
Industry Engagement - \$1.6 million

Successful industry engagement strategies must be employer-driven and community supported. A basic level of these strategies is the same no matter how small or large a board is, so half of this funding is divided by nine (equal amounts for each board). The other half of the funds utilize the WIOA formula percentages giving each board their 'share'. An additional factor assists in the challenges that larger geographic areas face in engaging with their industries.

Deliverables and pay points for Industry Engagement will include:

- Identify or update target industry sectors, by name and NAICS code(s), for 2017-2019 and clearly outline how this selection process occurred. (Pay point #1)
- Submit a target industry sector partnership action plan, developed by an industry-led partnership. (Pay point #2)
- Identify a minimum of three strategies, as identified by the industry-led partnership, that support the overall economic health of the target industry sector and region that can be implemented by June 30, 2019 with support from these funds. Each strategy must clearly define how it was identified, how the strategy will be executed, and which local partners and employers will be engaged. Each strategy will have two pay points-one at strategy submission, and one at successful strategy completion.

Pay points:



Local Competitiveness Strategies (Board Support) 2017-19	
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[illegible]

Industry Engagement 2017-19

Local Workforce Development Boards	2015-17 Total	2017-19 Base (divide by 9 boards)	% of Total WIOA Funds	2017-19 WIOA Formula	Mileage Differential (see Factors tab)	Totals	Biennial Change	% Change
Clackamas Workforce Partnership	\$144,608	\$83,333	7.33%	\$54,975	\$ -	\$138,308	(\$6,300)	-5%
East Cascades	\$161,783	\$83,333	11.16%	\$83,700	\$ 45,000	\$212,033	\$50,250	24%
Eastern Oregon	\$124,658	\$83,333	6.31%	\$47,325	\$ 45,000	\$175,658	\$51,000	29%
InCite	\$209,708	\$83,333	17.19%	\$128,925	\$ -	\$212,258	\$2,550	1%
Lane Workforce Partnership	\$153,458	\$83,333	9.69%	\$72,675	\$ -	\$156,008	\$2,550	2%
Northwest Oregon Works	\$129,158	\$83,333	5.59%	\$41,925	\$ -	\$125,258	(\$3,900)	-3%
Rogue Workforce Partnership	\$152,708	\$83,333	10.22%	\$76,650	\$ -	\$159,983	\$7,275	5%
Southwestern Oregon	\$128,483	\$83,333	6.90%	\$51,750	\$ 15,000	\$150,083	\$21,600	14%
Worksystems	\$295,433	\$83,333	25.61%	\$192,075	\$ -	\$275,408	(\$20,025)	-7%
Total	\$1,499,997	\$750,000	100%	\$750,000	\$ 105,000	\$1,605,000		

Work Experience

Local Workforce Development Board	2015-17 BTWO Allocation	2015-17 Percent of total BTWO	2015-17 Required Participants	2017 Percent of WIOA Formula	2017-19 Allocation based on WIOA Formula	Formula Based Work Experiences	Average of 15-17 and 17-19	Funding Based on Average %	Biennial Change	% Change	2017-19 Work Experiences
Clackamas Workforce Partnership	\$ 634,200	13%	141	7.33%	\$ 293,200	65	10.01%	\$ 400,382	\$ (233,818)	-37%	89
East Cascades	\$ 138,600	3%	31	11.16%	\$ 446,400	99	6.97%	\$ 278,662	\$ 140,062	101%	62
Eastern Oregon	\$ 29,400	1%	7	6.31%	\$ 252,400	56	3.45%	\$ 137,965	\$ 108,565	369%	31
InCite	\$ 928,200	19%	206	17.19%	\$ 687,600	153	17.88%	\$ 715,229	\$ (212,971)	-23%	159
Lane Workforce Partnership	\$ 382,200	8%	85	9.69%	\$ 387,600	86	8.67%	\$ 346,741	\$ (35,459)	-9%	77
Northwest Oregon Works	\$ 134,400	3%	30	5.59%	\$ 223,600	50	4.14%	\$ 165,582	\$ 31,182	23%	37
Rogue Workforce Partnership	\$ 466,200	9%	104	10.22%	\$ 408,800	91	9.77%	\$ 390,955	\$ (75,245)	-16%	87
Southwestern Oregon	\$ 100,800	2%	22	6.90%	\$ 276,000	61	4.46%	\$ 178,336	\$ 77,536	77%	40
Worksystems	\$ 2,184,000	44%	485	25.61%	\$ 1,024,400	228	34.65%	\$ 1,386,150	\$ (797,850)	-37%	308
Total	\$ 4,998,000	100%	1111	100%	\$ 4,000,000	889	100.00%	\$ 4,000,000			889

Individual Board Impacts

Clackamas Workforce Partnership	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 153,188	\$ 171,574	\$ 18,386	12%
Industry Engagement	\$ 144,608	\$ 138,308	\$ (6,300)	-4%
Work Experiences	\$ 634,200	\$ 400,382	\$ (233,818)	-37%
Total	\$ 931,996	\$ 710,264	\$ (221,732)	-24%

East Cascades	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 196,125	\$ 209,280	\$ 13,155	7%
Industry Engagement	\$ 161,783	\$ 212,033	\$ 50,250	31%
Work Experiences	\$ 138,600	\$ 278,662	\$ 140,062	101%
Total	\$ 496,508	\$ 699,975	\$ 203,467	41%

Eastern Oregon	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 311,646	\$ 336,873	\$ 25,227	8%
Industry Engagement	\$ 124,658	\$ 175,658	\$ 51,000	41%
Work Experiences	\$ 29,400	\$ 137,965	\$ 108,565	369%
Total	\$ 465,704	\$ 650,496	\$ 184,792	40%

InCite	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 315,938	\$ 212,520	\$ (103,418)	-33%
Industry Engagement	\$ 209,708	\$ 212,258	\$ 2,550	1%
Work Experiences	\$ 928,200	\$ 715,229	\$ (212,971)	-23%
Total	\$ 1,453,846	\$ 1,140,007	\$ (313,839)	-22%

Lane Workforce Partnership	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 175,313	\$ 152,520	\$ (22,793)	-13%
Industry Engagement	\$ 153,458	\$ 156,008	\$ 2,550	2%
Work Experiences	\$ 382,200	\$ 346,741	\$ (35,459)	-9%
Total	\$ 710,971	\$ 655,269	\$ (55,702)	-8%

Northwest Oregon Works	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 322,896	\$ 324,194	\$ 1,298	0%
Industry Engagement	\$ 129,158	\$ 125,258	\$ (3,900)	-3%
Work Experiences	\$ 134,400	\$ 165,582	\$ 31,182	23%
Total	\$ 586,454	\$ 615,034	\$ 28,580	5%

Rogue Workforce Partnership	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 173,438	\$ 156,760	\$ (16,678)	-10%
Industry Engagement	\$ 152,708	\$ 159,983	\$ 7,275	5%
Work Experiences	\$ 466,200	\$ 390,955	\$ (75,245)	-16%
Total	\$ 792,346	\$ 707,698	\$ (84,648)	-11%

Southwestern Oregon	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 321,208	\$ 280,722	\$ (40,486)	-13%
Industry Engagement	\$ 128,483	\$ 150,083	\$ 21,600	17%
Work Experiences	\$ 100,800	\$ 178,336	\$ 77,536	77%
Total	\$ 550,491	\$ 609,141	\$ 58,650	11%

Worksystems	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 530,250	\$ 279,880	\$ (250,370)	-47%
Industry Engagement	\$ 295,433	\$ 275,408	\$ (20,025)	-7%
Work Experiences	\$ 2,184,000	\$ 1,386,150	\$ (797,850)	-37%
Total	\$ 3,009,683	\$ 1,941,438	\$ (1,068,245)	-35%

State Totals	2015-17	2017-19	Bienniel Change	% Change
Competitiveness Strategies	\$ 2,500,002	\$ 2,000,000	\$ (500,002)	-20%
Industry Engagement	\$ 1,499,997	\$ 1,600,000	\$ 100,003	7%
Work Experiences	\$ 4,998,000	\$ 4,000,000	\$ (998,000)	-20%
Total	\$ 8,997,999	\$ 7,600,000	\$ (1,397,999)	-16%

Selected Characteristics by Workforce Area in Oregon							
Area		2016 Total	2011-2015 Poverty			2016 Unemployment	
Area	Square Miles	Population	Measured Population	Below Poverty Level	Poverty Rate	Level	Rate
Clackamas Workforce Partnership	1,882	404,980	386,435	36,894	10%	9,461	4.4%
East Cascades	29,028	353,105	332,256	54,593	16%	9,345	5.4%
Eastern Oregon	38,241	188,455	172,052	31,875	19%	4,811	5.8%
InCite	4,960	640,985	603,093	108,194	18%	15,826	5.2%
Lane Workforce Partnership	4,721	365,940	349,874	70,308	20%	9,230	5.1%
Northwest Oregon Works	4,973	253,995	237,521	42,632	18%	5,982	4.9%
Rogue Workforce Partnership	4,444	298,440	288,455	55,749	19%	8,151	6.0%
Southwestern Oregon	8,938	196,185	189,629	35,369	19%	5,275	6.5%
Worksystems	1,192	1,374,265	1,303,441	201,333	15%	32,215	4.2%

Sources: ESRI ArcGIS, Portland State Population Research Center, U.S. Census Bureau American Community Survey, and Oregon Employment Department Local Area Unemployment Statistics

Additional Funding for Geographic Area	
0-8,000 square miles	\$ -
8,001-16,000 square miles	\$ 15,000
16,001-24,000 square miles	\$ 30,000
24,001+ square miles	\$ 45,000

Additional Funding for Poverty Rate 15% or higher	\$ 75,000
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Rogue Workforce Partnership: 2015-2017 Sector Strategies Actual Expenses & 2017-2019 Industry Engagement Draft Budget

v20171012

	SECTOR STRATEGIES 7/1/15 - 6/30/17		INDUSTRY ENGAGEMENT 7/1/17 - 6/30/19		Biennial Difference	% Change
REVENUES:						
Original Grant	152,708		\$ 159,983		7,275	5%
Amendment 12/17/15	50,000	\$50K NCRC transition funds + verbiage to allow for training costs (incumbent, SNAP 50/50, etc.)			(50,000)	-100%
Total received	202,708		\$ 159,983		(42,725)	-21%
EXPENDITURES:						
Convene/Facilitate Industry Partnerships						
Personnel	86,179		33,000	Should we increase this amount?	(53,179)	-62%
College & Career for All	-		17,200	Total annual cost \$68,800. 1st Qtr paid via SOESD grant; RWP will solicit K-12 School Districts for remaining costs. 2nd Qtr backstop allocation of included here as RWP Industry Engagement amount. May need to increase, depending on level of K-12 contribution.	17,200	New
Meeting Refreshments, Travel	3,706	For industry sector meetings, etc.	5,000		1,294	35%
Training						
CNC/Heian Training (2 companies)	9,180		-		(9,180)	
Less contribution (CNC training)	(3,900)		-		3,900	-100%
Training (Incumbent? Start-up MSSC?)						
PLC Training for Electricians			12,000			New
MSSC-CPT Boot Camp			25,000	Placeholder -Cost could increase depending on availability of other funds & capacity we can leverage		New
National Career Readiness Certificate Transition						
College Dreams	39,627	NCRC transition / proctoring & technical assistance (2 years)	5,000	NCRC technical assistance (1 year)	(34,627)	-87%
Sector Strategies Consultation						
Audrey Theis	38,489	RAMP strategies	15,000	RAMP Strategies	(23,489)	-61%
Communications / Outreach / "Marketing"						
Creative Marketing & Design Services			18,000		18,000	New
Materials, Advertisements, etc.			9,835	Could allocate \$15 or \$20K		New
SOCNE advertising	907		950		43	5%
Subtotal	174,188		140,985		(33,203)	-19%
Overhead	8,249	Allocated rent, utilities, phone, IT, etc.	3,000	Allocated rent, utilities, phone, IT, etc.	(5,249)	-64%
Administration	20,271	10%	15,998	10%	(4,273)	-21%
Total expenditures	202,708		159,983		(42,725)	-21%

- remaining

Southern Oregon Success Draft Dashboard Goals & Example Indicators

Capabilities

1. Every baby has an optimal start

Example indicators:

- Prenatal care, first trimester initiation
- No family violence during pregnancy
- Gestational age at birth and/or birth weight
- Rate of drug affected babies

2. People are as healthy as possible

Example indicators:

- Mental health status (Index)
- Physical health status
- # days/month can do usual activities
- Oral health: untreated decay or needing urgent/emergent care

3. People have good self-regulation

Example indicators:

- Kindergarten assessment of self-regulation
- Discipline for behavioral problems at school
- DUI rate (under influence of intoxicants)
- Rate of getting enough sleep

4. People are engaged in learning and skill building

Example indicators:

- K-assessment numbers, operations, letter names & sounds
- Reading @ 3rd grade
- Cohort high school graduation rate
- Percent reporting not able to work

5. People feel safe, and are safe

Example indicators:

- Did not go to school because feeling unsafe
- Accident/injury hospitalizations of women and children
- Court protection actions; protection orders, out of home placements
- Workplace injury or illness

6. People are protected from negative effects of adversity

Example indicators:

- Proxy ACE Score 0-2 years
- Proxy ACE Score adolescents
- Suicide ideation
- Crisis services use among people with ≥ 2 ACE-attributable problems

7. People have a sense of support and belonging

Example indicators:

- Moved ≥ 5 times before kindergarten
- Feel socially/emotionally supported usually or always
- Number of people I can count on for practical help
- Divorce/separation rate

8. People feel welcomed and respected in community

Example indicators:

- Pre-school suspensions and expulsions
- Teachers treat students with respect
- Disproportionate interdiction (e.g.: justice, child welfare) services
- Feel that life has purpose

9. People have equitable, sufficient, & predictable resources

Example indicators:

- Food insecurity
- Childhood poverty
- Underemployment
- ALICE: Asset Limited, Income Constrained, Employed

10. People take care of community & natural resources

Example indicators:

- Participation in faith, arts, clubs, or sports
- Voting rates
- Water quality
- Recycling participation

11. All communities are places of wellbeing & vitality

Example indicators:

- Median home value
- Household income distribution
- Ratio of business start-ups to business closures
- Growth in appraised value of commercial/industrial properties

Attachment/Belonging

Community/Culture/Spirituality

Disparity Reduction Applies to All Goals:

Goal monitoring is intended to include disaggregation of data by race/ethnicity, income level, sexual orientation and gender (when feasible, given available data) in order to monitor and focus efforts on reducing disparities.

Southern Oregon Success Dashboard Development

The Steering Committee asked the Metrics Workgroup to compile key performance indicators that, taken together, will provide a quick glimpse (Dashboard) of how the community is progressing towards its goals.

The Dashboard will build upon, and complement other efforts focused on improving wellbeing and productivity in the Rogue Valley. For example, the Dashboard will align with Self-Healing Communities Initiative education, offered to over 5,000 people to date in our region and which includes a research-based set of core protective systems: capabilities, attachment/belonging, and community/culture/spirituality.

The purpose of the Dashboard is to provide a holistic, objective, real time monitoring system to support dialogue about our progress meeting important community goals. The dashboard provides a high-level framework for continuous improvement of our collective efforts, and supports learning collaboratives and communities of practice to design and work on specific goals.

In preparation for designing the dashboard, the workgroup developed a matrix to categorize the universe of performance indicators currently used in local systems as well as those previously used by Southern Oregon Success. This matrix will organize data in terms of broadly stated community goals that align with the three protective systems mentioned above (capabilities, attachment/belonging, and community/culture/spirituality).

As envisioned, the dashboard should be something that all members of the community can access, understand and use as a part of a narrative about our community. Reading it, we hope to say, "Our community has made progress, we're doing better, and our residents are respected and fulfilled". The goals are broad and conceptualized to stay the same over the years. The specific indicators of progress toward the goals can change over time.

The workgroup developed a list of eleven (11) goals. The goals are organized by three core protective systems. For each goal, we have provided examples of indicators we might use to learn whether we are making progress toward the goal. Once goals are finalized, the workgroup will populate the matrix with indicators that are useful, credible, and available for monitoring community success. The workgroup will then present the final matrix to the Southern Oregon Success Steering Committee for review, vetting and approval.

We are asking key leaders to offer advice and perspective about the list of goals – as a framework for the Southern Oregon Success Dashboard.

Instructions

- Review the list of goals attached to this document
- Each goal is written on a flipchart sheet posted around the room
- There are two colors of post-its at your table. Use a yellow post-its to suggest wording changes on the relevant goal and attach it to that sheet.
- Use the green post-it with or without any comments to indicate agreement with the goal.
- Please remember that we want these goals to be people- and community-centered and to describe a condition that we would like to see in our community. They are broad by design. The specific indicators will identify the details.

If you have any questions or comments, if you have input into the wording of these goals, or would like to participate in the metrics workgroup going forward, please contact Bob Lieberman at rlieberman@kairosnw.org.

RWP Workforce Board ♦ Membership & Positions

v20170815ta

Business Representatives ♦ Mandatory Majority			Labor Representatives &/or Joint Apprenticeship Training Center ♦ Mandatory		
1	Jessica Gomez* ♦ Founder & CEO <i>RWP Chair</i>	Rogue Valley Microdevices	Lance Corley ♦ Apprenticeship Director	Crater Lake Electrical JATC <i>Joint Apprenticeship Training Committee IBEW Local 659 - International Brotherhood of Electrical Workers</i>	1
2	Michael Donnelly* ♦ Materials Manager <i>RWP Vice-Chair</i>	Carestream, Inc.	Drew Waits ♦ Business Agent / Organizer	Southern Oregon/Northern California Plumber & Steamfitters, UA 290	2
			Community-Based Organizations - with demonstrated experience & expertise in addressing the employment needs of individuals with barriers to employment - serve veterans , or individuals with disabilities		
			Organizations - with demonstrated experience & expertise in addressing the employment, training, or education needs of eligible youth , including representatives of organizations that serve out-of-school youth		
3	Nikki Jones* ♦ Owner	Express Employment Professionals	Brian Shumate ♦ Superintendent	Medford School District	3
4	Brent Kell ♦ Executive Director	Valley Immediate Care	Kirk Kolb ♦ Superintendent	Grants Pass School District	4
5	John Underwood* ♦ Human Resources Manager	Timber Products	Scott Beveridge ♦ Superintendent	Southern Oregon Education Service District	5
			Education & Training – Title II & Higher Education ♦ Mandatory		
6	Norm Kester ♦ CEO	Quantum Innovation	Cathy Kemper-Pelle ♦ President	Rogue Community College	6
			Economic / Community Development ♦ Mandatory		
7	Trever Yarrish ♦ Co-Founder & COO	Zeal	Alex Campbell ♦ Regional Coordinator	Regional Solutions Team	7
			OED / Wagner-Peyser ♦ Mandatory		
8	Vacant		Sherri Stratton ♦ Senior Manager	Oregon Employment Department	8
			Vocational Rehabilitation ♦ Mandatory		
9	Shawn Hogan * ♦ VP of Engineering	Linx Technologies, Inc.	Matthew Balkwill ♦ Area Manager	Office of Vocational Rehabilitation Division	9
			Optional Members		
10	Catherine Goslin ♦ Director of Human Resources	Rogue Valley Manor	Jeremy Player ♦ District Manager	Oregon Department of Human Services	10
11	Kim Oveson ♦ Human Resource Officer	LaClinica	Linda Schott ♦ President	Southern Oregon University	11
12	Joe Meyers ♦ Vice President	Pacific Electrical Contractors	Nagi Naganathan President	Oregon Institute of Technology	12
13	Paul Macuga ♦ Chief People Officer	ASANTE Health Systems			
Total RWP Workforce Board Membership = 25 Positions					

Mandatory
Must be
20% of
Workforce
Board

Mandatory = WIOA Workforce Board Membership Requirement | * = Corporate Director

WORKFORCE INNOVATION & OPPORTUNITY ACT

SEC. 3. DEFINITIONS.

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

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

SEC. 107. LOCAL WORKFORCE DEVELOPMENT BOARDS.

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

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

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

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

- (i) **shall** include representatives of **labor organizations** (for a local area in which employees are represented by labor organizations), who have been nominated by local labor federations, or (for a local area in which no employees are represented by such organizations) other representatives of employees;
- (ii) **shall** include a representative, who shall be a member of a labor organization or a training director, from a **joint labor-management apprenticeship program**, or if no such joint program exists in the area, such a representative of an apprenticeship program in the area, if such a program exists;
- (iii) may include representatives of **community based organizations** that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve **veterans** or that provide or support competitive integrated employment for individuals with **disabilities**; and
- (iv) may include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of **eligible youth**, including representatives of organizations that serve **out-of-school youth**;

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

- (i) **shall** include a representative of eligible providers administering **adult education and literacy** activities under title II;
- (ii) **shall** include a representative of institutions of **higher education** providing workforce investment activities (including community colleges);

(iii) may include representatives of **local educational agencies**, and of **community-based organizations** with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment;

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

(i) **shall** include a representative of **economic and community development** entities;

(ii) **shall** include an appropriate representative from the **State employment service** office under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) serving the local area;

(iii) **shall** include an appropriate representative of the programs carried out under title I of the **Rehabilitation** Act of 1973 (29 U.S.C. 720 et seq.), other than section 112 or part C of that title (29 U.S.C. 732, 741), serving the local area;

(iv) may include representatives of agencies or entities administering programs serving the local area relating to **transportation, housing, and public assistance**; and

(v) may include representatives of **philanthropic organizations** serving the local area; and

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