





# Rogue Workforce Partnership ~ Corporate Directors Meeting Agenda




Thursday April 18, 2019 • 3:00 to 5:00 p.m. • Woolworth Building - First Floor • 37 N. Central Ave. • Medford

Video/Phone Conference access available <https://zoom.us/j/363748376>. Select your audio preference: **1) Use telephone + 1 (669) 900-6833; Access Code: 363748376** normal long distance charges will apply); **2) Or, use computer microphone & speakers** (headset is recommended to avoid reverb)

Time	Item	Objective	Facilitator   Presenter
3:00p	<b>Call to Order</b> <ul style="list-style-type: none"> <li>Welcome &amp; Introductions</li> </ul>		Jessica Gomez
3:05p	<b>Consent Agenda</b> <u>Actions</u> <ul style="list-style-type: none"> <li>February 21, 2019 - Corporate Directors Meeting Minutes</li> </ul> <u>Information</u> <ul style="list-style-type: none"> <li>Whistleblower Policy &amp; Employee Handbook <a href="https://drive.google.com/open?id=1kZ3K4mjQlZOIh0djwqcUSLTPFz4IgbpN">https://drive.google.com/open?id=1kZ3K4mjQlZOIh0djwqcUSLTPFz4IgbpN</a></li> <li>Letter to Ways &amp; Means Education Subcommittee on HB 5024</li> <li>Final PY 17 Monitoring Report</li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>Action – approve Consent Agenda</b></li> <li>▸ <b>Info Update</b> - policy was added per last meeting discussion</li> <li>▸ <b>Info Update</b> - letter supporting funding for Workforce Boards</li> <li>▸ <b>Info Update</b> - annual monitoring report of RWP conducted by Higher Education Coordinating Commission, Office of Workforce Investments - results: no findings</li> </ul>	Jessica
3:10p	<b>Endowment Fund</b>		
	<ul style="list-style-type: none"> <li><b>Investment Report</b> </li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>Review</b> - Endowment Fund investments managed by Sky Oak</li> </ul>	Sherri, Jennifer Davis - <i>Sky Oak Wealth</i>
	<ul style="list-style-type: none"> <li><b>Guidance on Endowment Fund Strategic Uses / Intentions</b> </li> <li><b>SORED I Regional Strategy Support Request</b>  <a href="https://drive.google.com/open?id=1RyHMTmFSBivPpqlja000jYTRRMbgXXav">https://drive.google.com/open?id=1RyHMTmFSBivPpqlja000jYTRRMbgXXav</a></li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>Discussion &amp; Guidance</b> - on Endowment Fund strategic intentions, uses, &amp; annual distribution amount</li> <li>▸ <b>Action</b> – on SORED I request for funding support, as amended to a \$2,500 recommended allocation based on RWP/SORED I follow-up confer</li> </ul>	Jim, Sherri  Jessica, Jim
3:40p	<b>Oversight, Compliance &amp; Policies</b>		
	<ul style="list-style-type: none"> <li><b>One-Stop Operator</b> </li> </ul>	<ul style="list-style-type: none"> <li>▸ <b>Review &amp; Action</b> – discussion on current contracted services and proposed next steps to conduct new procurement for One-Stop Operator</li> </ul>	Jim, Ida

	<ul style="list-style-type: none"> <li>• <b>Incumbent Worker Training for Non-WIOA Funds Policy</b> </li> </ul>	<ul style="list-style-type: none"> <li>› <b>Review &amp; Action</b> - on ICW for non-WIOA funds policy, per RWP feedback at March Local Workforce Board meeting</li> </ul>	Jim, Jill
	<ul style="list-style-type: none"> <li>• <b>Maximum Training Benefit Policy</b></li> </ul>	<ul style="list-style-type: none"> <li>› <b>Discussion &amp; Guidance</b> - on drafting a policy delimiting total maximum training subsidy benefit a company can receive</li> </ul>	Jim, Jill
<b>4:10p</b>	<b>RWP Budget, Programs &amp; Strategic Investments</b> 		
	<ul style="list-style-type: none"> <li>• <b>RWP Budget / Actuals as of December 31, 2018</b> </li> <li>• <b>Program Services Investment History &amp; Planning for FY 2019-2020</b> </li> </ul>	<ul style="list-style-type: none"> <li>› <b>Review</b> - of budget &amp; actual expenditures</li> <li>› <b>Info Update &amp; Guidance</b> <ul style="list-style-type: none"> <li>▪ Scaling-up our innovative promising practices &amp; applying lessons learned in the upcoming program/fiscal year</li> <li>▪ Update on predictive analytics/longitudinal data initiative that will ultimately become our best practice tool for guiding short &amp; long-range investment decisions</li> <li>▪ Affirmation of RWP staff's proposed investment strategy/prep work in preparing FY 2019-2020 budget &amp; contracts</li> </ul> </li> </ul>	Sherrri Jim, Jill
<b>4:40p</b>	<b>Strategic Roadmap, Objectives &amp; Key Results</b> <ul style="list-style-type: none"> <li>• <b>John Bowling / Sustainable Leadership Consultation</b></li> </ul>	<ul style="list-style-type: none"> <li>› <b>Info Update</b> – on our next steps to refine this tool &amp; create greater focus, clarity &amp; alignment in our streams of work</li> </ul>	Jim, Jill
<b>4:45p</b>	<b>RWP Membership</b> <ul style="list-style-type: none"> <li>• <b>On Creating an Emeritus Status</b></li> </ul>	<ul style="list-style-type: none"> <li>› <b>Discussion</b> – with emerging retirements, should RWP consider creating an “Emeritus” status of membership, for those leaders interested in staying engaged with our work?</li> </ul>	Jim
<b>4:55p</b>	<b>Business-Education Partnership &amp; Other K-12 Related Updates</b>	<ul style="list-style-type: none"> <li>› <b>Info Update</b> - we may (<i>or may not</i>) have a short update on BEP &amp; other K-12 partnerships to share</li> </ul>	Jim, Dana
<b>5:00p</b>	<b>Adjourn</b>		Jessica

 = Handout attached or will be handed-out at meeting

Auxiliary aids and services are available upon request to individuals with disabilities. Contact Tami Allison at 541-842-2518.



**MINUTES**

ROGUE WORKFORCE PARTNERSHIP • CORPORATE DIRECTORS

February 21, 2019 ♦ 37 N. Central Ave. - Board Room ♦ Medford, OR

**MEMBERS PRESENT**

Chair, Jessica Gomez  
Commissioner Bob Strosser  
Vice-Chair, Michael Donnelly\*  
Nikki Jones  
John Underwood  
Paul Macuga

**MEMBERS ABSENT**

Commissioner Darin Fowler  
Shawn Hogan

**OTHERS PRESENT**

Norm Kester, Quantum Innovations  
Trevor Yarrish, ZEAL  
Mark Damon, KDP Certified Public Accountants  
Ben Cohn, KDP Certified Public Accountants

Jim Fong, Executive Director, Rogue Workforce Partnership  
Sherri Emitte, Chief Finance and Administration Officer, Rogue Workforce Partnership\*  
Jill teVelde, Workforce Development Manager, Rogue Workforce Partnership  
Ida Saito, Partnership Engagement Manager, Rogue Workforce Partnership  
Tami Allison, Senior Project Manager, Rogue Workforce Partnership

*\*indicates that individual joined remotely.*

**Quorum Present:** Yes

**1) Call to Order**

The meeting was called to order by Chair, Jessica Gomez at 3:05 P.M.  
A round of introductions were made.

**2) Consent Agenda**

**John Underwood moved to approve the consent agenda consisting of the December 6, 2018 Rogue Workforce Partnership Corporate Director Meeting minutes, and the Travel Reimbursement Policy Revision. The motion was seconded by Mike Donnelly and approved unanimously.**

John asked to pull the Travel Reimbursement Policy revision out from the consent agenda for discussion. Questions were posed regarding the meals and travel status on page 2. Sherri explained that all RWP staff are salaried (with the exception of the Accounting Specialist) and

are exempt from overtime. Directors suggested to review the CFR and note it in the policy as there have been times when employers have thought that employees are exempt and there were not. Sherri indicated she feels we have minimal risk in the area and is confident the policy, as written, covers us. **It was also suggested that we generate a policy that would include the Accounting Specialist.** The Corporate Directors agreed to uphold the motion and second to approve the policy as written, and if, after Sherri does some review we need to make revisions, staff will bring back a revised document at that time.

### 3) Incumbent Worker Policy

Jim corrected the agenda by indicating that we don't want to take action today on the Incumbent Worker Training Policy; but rather, ask for guidance and then bring to the March workforce board meeting.

### 4) RWP Audit

Mark Damon and Ben Cohn from KDP Certified Public Accountants presented the audited financial statements, IRS form 990, and Department of Justice Form CT-12. Mark and Ben indicated that this was a very smooth and clean audit. The directors were referred to page 19 of the audited financial statements that gives a summary of the audit results noting that the report expressed a clean opinion with no issues noted, no non-compliance noted and no internal controls over compliance weaknesses. There were no exceptions to the audit of federal funds. The auditors also noted that RWP staff are doing a great job in monitoring their sub-recipients. Mark concluded by saying that it was a pleasure working with the group and the team at RWP.

In reviewing the Form 990, John noted that we had a previous conversation about a "Whistle Blower Policy" and would like an update on whether or not the policy is needed. **Jim indicated that RWP staff will flag this and draft a policy for review.** Mark added that although this policy is good to have, the size of the organization and the cost to implement are important to think about.

\_\_\_\_\_ **moved to approve the audit as recorded as well as the Form 990 and CT-12. The motion was seconded by Nikki Jones and approved unanimously.**

### 5) RWP Priorities, Work & Meetings in the Future

Jim reported that he and Norm met to have a more in-depth discussion on the ideas Norm had brought up at the January Workforce Board meeting. This conversation explored ways to streamline and focus the work done at the meeting. The goal would be for the formidable community leaders at the table to do more than just share information and identify opportunities for program and systems alignment.

Norm would like to see the Workforce Board:

- **Work on clarifying our RWP “Big Hairy Audacious Goal”**  
*Per “Good to Great” by author Jim Collins*
- **Pre-load information so that we don’t spend meeting time just sharing information**  
*This could be done through videos, PowerPoints (narrated) or documents that members could access prior to the meeting, so that they can come prepared with questions, feedback, ideas, and capacity to make decisions, bust barriers and solve problems*
- **Make decisions & solve problems**  
*So instead of just sharing information at our meetings, we come together to make decisions and solve problems that we can’t otherwise solve just working within our own organizations; i.e., more effectively use the power of this group of strong community leaders who come to the table.*

Jim shared that the action plans for both the Healthcare Workforce Subcommittee and the Rogue Advanced Manufacturing groups are just being refined to reflect a similar clarity of focus on the big overarching objectives of these industry sector groups. “Building a Demand-Driven Workforce and Education System” is a key big goal. The other big goal that that’s emerging is building “Bridges out of Poverty.” Paul Macuga is spearheading an effort to bring this focus and training (*based on Ruby Payne’s work*) to the region.

Much discussion took place about the metrics) we are moving, what our primary outcomes are, as well as questioning the overarching board itself delivering the value intended. The Corporate Directors must weigh in on what the common thought is.

Paul added that the Corporate Directors is a governance group of an organization and not generally very fulfilling work. The action takes place at the work group level, and as a board, we can ask for accountability from the workgroups on what is taking place.

Trever indicated that in doing the strategic plan one step beyond this is missing and that is using the strategic roadmap to drive the budget and how the budget maps to the strategic drivers. There seems to be a disconnect between the strategic roadmap and the budget and the groups are not incentivized to do this.

Norm indicated that he is advocating for, outside of the actionable items, pre-loading the meeting with the information required to bring the expertise to the table. Have strategic things to talk about during the meeting and only talk about those things that we chose to be intentional about. Align systems to get the output we need, and narrow down the strategic intent as he feels it is too broad.

The conversation moved to the program overview document and considering using this as an annual document. The next document shared is a new iteration of the dashboard that adds the WIOA information as well as the other grants. The directors voiced a disconnect between the strategic roadmap and the dashboard and feels outcomes need to be created through the lenses

of the roadmap. Jim stated that we are required to get numbers from our third party contracts; however, it is a work in progress and “we are always scrambling due to our staffing levels”.

Jessica suggested replicating this conversation at the workforce board and ask if we are in alignment and ask for feedback. “Picking one topic and diving in deep to unpack to see if it aligns to the roadmap would be one way to start”, Jessica stated. Some suggestions for agenda items are:

- Budget Investment and Strategic Alignment
- Modified high school diploma
- Refining the roadmap
- Transportation sector
- Bridges out of Poverty

After much discussion, the directors feel it is worth a try to build some of this into the next agenda with the workforce board.

**6) RWP Budget, Programs & Strategic Investments**

This item was not discussed and will be deferred to a future meeting.

**7) RWP Membership**

This item was not discussed and will be deferred to a future meeting.

**8) Adjourn**

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

Respectfully Submitted,

Tami Allison  
Senior Project Manager

---

Approved

Date

Jessica Gomez, RWP Chair



# ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

---

DATE: April 5, 2019  
TO: RWP Corporate Directors  
FROM: Sherri Emitte, Chief Finance and Administrative Officer  
SUBJECT: Employee Handbook Revision 1

For your information, I have attached a recently revised Employee Handbook. The original handbook was created when RWP became autonomous in July 2015. Most, if not all, of you may not have seen it since then.

At the recommendation of this board, we added Section 2.4 to include a Whistleblower Policy. We also added Section 11.7 to the Employee Benefits section which makes reference to the Travel Reimbursement Policy available outside of the handbook. There were also some other insignificant clean-up revisions (like changing our address).

Please let me know if you have any questions or comments.



# ROGUE WORKFORCE PARTNERSHIP

37 N. Central Ave. ♦ Medford, OR 97501  
541.842.2500 ♦ [rogueworkforce.org](http://rogueworkforce.org)

**Serving Jackson & Josephine Counties**  
**Growing Skills • Building Careers • Boosting the Economy**

March 19, 2018

Honorable Lew Frederick  
Honorable Susan McLain  
Joint Committee on Ways and Means  
Subcommittee on Education  
900 Court St. NE, S-419, H-477  
Salem, OR 97301

Dear Senator Frederick, Representative McLain and Members of the Committee:

On behalf of key Rogue Valley community leaders, I am writing to inform you of the importance of fully funding HB 5024, appropriating moneys from the General Fund to the Higher Education Coordinating Commission.

The Rogue Workforce Partnership is a business-led, public-private partnership that works to strengthen the economy of the Rogue Valley by addressing the region's workforce priorities. We convene and catalyze and dynamic partnerships with key industry leaders, K-20 educators, workforce agencies, organized labor, economic development, and other key community partners. We build innovative solutions to address the workforce priorities and needs of employers, especially those in traded-sector industries that drive our region's economic vitality. Working collaboratively across complex systems and institutional boundaries, we leverage and align resources to build the skills and talents of our region's workforce. With this alignment, local businesses and career-seekers can succeed in the modern global economy.

Funding from HB 5024 is critical to our regional work as Local Workforce Boards, and the multitude of companies, job/career-seekers and education partners we work with on a daily basis. As a result of these investments, we are making bold progress our efforts to create:

- Ever-increasing alignment of education, training, and job placement efforts to meet the unique needs of local businesses and career-seekers.
- A unified workforce and education system that is demand-driven and focused on skills and talent development.
- "Up-Skill and Backfill" opportunities that provide new "earn and learn" stepping stones for career progression and meeting critical industry needs.
- Success for all Southern Oregonians, regardless of the opportunity and systemic gaps that create achievement disparities due to intergenerational and/or acute poverty, race and ethnicity / communities of color, disabilities, adverse childhood experiences or other challenges.

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

**Mike Donnelly** | Materials Manager  
*Carestream, Inc. & - RWP Vice-Chair*

**Scott Beveridge** | Superintendent  
*Southern Oregon Education Service District*

**Alex Campbell** | Coordinator  
*Governor's Regional Solutions Team*

**Lance Corley** | Apprenticeship Director  
*Crater Lake Electrical – JATC & IBEW 659*

**Catherine Goslin** | Director Human Resources  
*Rogue Valley Manor*

**Shawn Hogan** | VP Engineering  
*Linx Technologies*

**Nikki Jones** | Owner  
*Express Employment Professionals*

**Brent Kell** | Executive Director  
*Valley Immediate Care*

**Cathy Kemper-Pelle** | President  
*Rogue Community College*

**Norm Kester** | CEO  
*Quantum Innovations*

**Dr. Tom Keyser** | Dean College of Engineering,  
Technology, and Management  
*Oregon Institute of Technology*

**Kari Kingsolver** | Area Manager  
*Office of Vocational Rehabilitation*

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

**Paul Macuga** | Chief People Officer  
*ASANTE Health Systems*

**Melissa Wolff** | Program Manager  
*Oregon Department of Human Services*

**Joe Myers** | Vice President  
*Pacific Electrical Contractors*

**Alex Poythress** | Managing Partner  
*REVEIL Agency*

**Linda Schott** | President  
*Southern Oregon University*

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

**Sherri Stratton** | Senior Manager  
*Oregon Employment Department*

**John Underwood** | Human Resources Manager  
*Timber Products*

**Drew Waits** | Labor Representative  
*Plumbers & Steamfitters, UA 290*

**Trevar Yarrish** | Co-founder & COO  
*Coding Zeal*

Described below is a specific example of this work in Advanced Manufacturing. We also have works in progress on other multiple sectors, including Healthcare, Information Technology / E-Commerce, Transportation and Logistics, and Construction Trades.

### ***Advanced Manufacturing – Building New Talent Pipeline Capacity***

#### Entry Level

With support from state investments, a core group of our region’s industry leaders in Advanced Manufacturing came together to create new training and “earn and learn” capacities for incumbent, transitioning and emerging workers. Working with a national expert in industry recognized certifications, a core group of Rogue Advanced Manufacturing Partnership (*RAMP*) leaders worked together intensively to identify and aggregate skill needs across all their companies. They surveyed 50 other companies in the region as well to assess broader common needs, and then focused first on addressing the entry-level skills needs for all companies by targeting the use of the [Certified Production Technician](#) (CPT) credentials available through the Manufacturing Skills Standards Council.

After extensive work with the region’s K-12 education partners and Rogue Community College, partners just recently launched new CPT training capacities for high school students, adult workers seeking to transition their careers to better opportunities in Advanced Manufacturing, and incumbent workers needing training and certification in these entry-level skill areas of: Safety; Quality Practices and Measurement; Manufacturing Processes and Production; Maintenance Awareness; and Green Production.

Students and job/career-seekers are beginning to fill these training slots, and our next goal is to expand these opportunities by blending and braiding multiple strands of state, federal and private-sector funds to scale and sustain this new training capacity and trainee throughput. Moreover, these entry-level skills represent the most pressing and highest priority need for our region’s Advanced Manufacturing companies. Survey projections have estimated over 1000 job openings per year across the region, mostly in entry-level production and assembly positions. In addition, our labor market analysis revealed that there are over 430 manufacturers in the Rogue Valley, but that over 66% had 10 employees or less. In partnership with our regional economic development partners, we have identified and connected with only 75 of these companies. So, the work of continuing to outreach and aggregate the workforce needs of all these manufacturing companies is still very much before us.

#### Up-Skilling and Career Paths for Incumbent Workers

RAMP industry leaders have also put into place next tier career pathway training for incumbent workers. Working in close partnership with our Rogue Workforce Partnership staff and Rogue Community College, industry leaders prioritized the need for Mechatronics (*mechanical, electrical, electronics, robotics*) and pre-apprenticeship Millwright and Plant Electrician training for incumbent workers. As with many high-skill occupations, the pace of baby-boomer retirements is severely impacting the availability of these workers. Up-skilling current workers with proven work ethic and skills is seen as a critical piece in assembling the complete workforce skills puzzle. Streamlined non-credit on-boarding entry options and public-private co-investment opportunities have been created to allow for easy access to these Up-Skill training paths to fill this much-needed portion of the talent pipeline.

#### Employer Co-investments and Building the Region’s Manufacturing Talent Pool

RAMP industry leaders have also stepped-up by contributing funds to create a flexible Revolving Tuition, Support and Outreach Fund. By coupling these private-sector investments with public state and federal funds, our common goal is to leverage current training capacities, create new system and training capacity that’s in high-demand, and fill the talent pipeline with satisfied and successful career-seekers for all of the region’s

Advanced Manufacturing companies. This co-investment strategy is specifically intended to “lift all boats.” Our goal is to reach out to all of the region’s 430 Advanced Manufacturers, to keep aggregating and meeting their priority skills training needs, and create the most robust and accessible set of demand-driven career pathway training opportunities for career-seekers to traverse.

The example above is just one of multiple testimonies we can provide as to the impact and benefit that will result with the full funding of HB 5024. We are working with many more key industry partners, K-20 educators, workforce and labor partners to create the systems alignment and opportunities so needed by both private-sector employers and job/career-seekers. We would be happy to provide additional testimony to the Joint Committee on Ways and Means - Subcommittee on Education on other projects and systems innovations we have underway.

Pasted below are also the logos of many (but not all) of our partners. From industry leaders to educators, to organized labor, to workforce agency partners. We wanted to give you a visual sampling of the range of our partners. Also attached are artifacts from our work. These include:

- **Rogue Valley Sector Strategies Diagram** - *depicting the new “Stepping Stones” we’re putting in place to allow more job/careers-seekers to traverse the expanded “earn and learn” career pathways we’re creating.*
- **MSSC – Certified Production Technician** - *certification details*
- **Certified Production Technician Flyer** - *targeted to transitioning workers*
- **Mechatronics / Plant Systems Technician ~ Incumbent Worker Training Flyer** - *targeted to Advanced Manufacturing employers*
- **Link to Video Highlighting the Knowledge and Skills Transfer Program** - *a 2017 pilot program which we based our current Up-Skill and Backfill strategy. Click on <http://www.rogueworkforce.org/> and scroll down to the 1<sup>st</sup> video.*

Funding the work of Local Workforce Boards is critical. We need to continue building these kinds of skill-building capacities and alignments in order to meet the talent development needs of our most critical industries, and continue to fuel our region’s economic vitality. Local Workforce Boards play a unique role in convening, facilitating, aggregating, and aligning the many fragmented system partners from industry, education, organized labor and workforce. Full funding for HB 5024 will continue the long-term visionary investment to build this needed system alignment capacity. And it will also provide short-term returns on this investment in to form of skills being gained, immediate talent needs being met, and career and business success being generated for the benefit of all Oregonians.

If you need additional information, please do not hesitate to contact me at [jgomez@roguevalleymicro.com](mailto:jgomez@roguevalleymicro.com) or 541.774.1900, or contact Jim Fong, Executive Director of the Rogue Workforce Partnership, at [jimf@rogueworkforce.org](mailto:jimf@rogueworkforce.org) or 541-842-2515.

Sincerely,



Jessica Gomez  
Chair, Rogue Workforce Partnership and  
CEO, Rogue Valley Microdevices



# Oregon

Kate Brown, Governor

**Higher Education Coordinating Commission**

Office of Workforce Investments

875 Union Street NE

Salem, OR 97311

[www.oregon.gov/HigherEd](http://www.oregon.gov/HigherEd)

March 18, 2019

MAR 23 2019

Jessica Gomez, Chair  
Rogue Workforce Partnership  
c/o RWP  
100 East Main St. Suite A  
Medford, OR 97540

Dear Ms. Gomez,

The final monitoring report for Program Years 2017 Workforce Innovation and Opportunity Act Title 1 services in the Rogue Valley Workforce area is attached.

Please extend our thanks to staff for their work in preparing materials for our visit, and their assistance during our review.

If you or your staff have any questions, please contact me at 503-947-2404, or Debra Welter at 503-947-3032.

Sincerely,

Karen Humelbaugh

Director of the Office of Workforce Investments

Enclosure

***Final Monitoring Review Report  
Program Year 2017 (July 1, 2017 – June 30, 2018)***

To satisfy requirements for oversight and monitoring of Workforce Innovation and Opportunity Act (WIOA) Title I funds, the State of Oregon's Higher Education Coordinating Commissions-Office of Workforce Investments (HECC-OWI) monitoring plan provides for on-site monitoring reviews of local workforce development boards. The state's monitoring system ensures that program policies and outcomes meet the objectives and regulations of WIOA, and determines if compliance with WIOA requirements has been demonstrated. The on-site monitoring also allows for determination as to whether a local workforce development board is making acceptable progress in addressing any deficiencies, and to ensure compliance with the nondiscrimination and equal opportunity requirements of WIOA. The monitoring review also addresses the local area's compliance with the Department of Labor's (DOL) uniform administrative requirements.

Staff from HECC-OWI conducted its review of Rogue Workforce Partnership (RWP) in Medford, Oregon on October 22-26<sup>th</sup>, 2018. HECC relied on work, responses and other information provided during the Program Year 2017 monitoring conducted by Debra Welter, Duane Ritchie, and John Asher.

This report cites the results of our tests of compliance and review of policies and processes, and includes, defined as:

*· Observations: In the course of the review, the monitoring team discovered areas that raised some measure of concern. Such concerns may be easily alleviated, and the monitoring team made every effort to discuss solutions with the appropriate staff to minimize concern.*

*· Findings: Findings are items or issues that are of significant concern or that indicate the violation of a guiding principle, regulation or rule. The monitoring team requested additional information beyond the initial review questions to determine whether the issue discovered was an abnormality of the review process or a valid violation.*

**This final report cites no observations and no findings.**

During HECC's visit, a total of 26 Administrative and 41 Programmatic elements were reviewed using responses provided in the state's Monitoring Review Guide, WIOA Regulations, state and local policies and in-person interviews. It was determined that all required attachments were submitted. No major policy or procedural deficiencies or omissions were noted.

The fiscal components of the review guide provided information and details, which confirm that the fiscal system of expenditure authorization and record keeping is sufficient to provide reasonable accounting control over assets, liabilities, revenues, and expenditures in connection with those funds. Staff studied samples of payroll and cash disbursements, training, supportive services, WIOA OJT, and work experience, tested cost allocation plans, cash draws, cash

account reconciliations, program income, the 75% level requirement for Out-of-School Youth expenditures, and examined the non-expendable property inventory listing.

All Administrative and Program Policies reviewed were found to be in compliance with federal law although a scheduled time to review and adjust to minor revisions to policies to reflect current guidance letters should be planned. It is also suggested that when revising policies in the future, RWP remove references to CCWD, WID, OWI and use the Higher Education Coordinating Commission (HECC) reference only. This will prevent having to revise in the future solely because of a name change.

**Suggestion:** Revised policies should identify responsibilities by position and include an addendum that list the individuals currently holding the position. This will keep the policies fresh and up to date through staff changes and not require extensive changes.

**Resolution:** RWP indicates that have recently revised several of their policies to reflect the position title of those responsible. We will review them in the PY18 monitoring.

**Suggestion:** The Rapid Response Policy and Protocols are in need of revision as staff and processes have recently changed. HECC/OWI monitoring staff shared some examples of recently revised policies used by other boards. These new policies and protocols serve as a guide to rapid response both as an overall system and as an activity and reflect WIOA guidance in more detail than the initial policies created early in the transition from WIA.

**Resolution:** RWP indicates that they will make changes to their policy once they receive the state Rapid Response policy as an example.

**Suggestion:** RWP should create an organizational chart as one is requested by HECC to document internal controls at the time of review.

**Resolution:** RWP indicates that they have created an organization chart to resolve this suggestion.

**Best Practice:** RWP has done an excellent job of recruiting education sector board members and currently have representation from each of the school districts, education service districts, community college and the university system.

This final report is being provided on March 18, 2019. RWP will have one (1) week from the date of the final report to prepare and submit a formal appeal to any findings. The appeal will be directed to the Director of Office of Workforce Investments, who will make the final decision.

Draft report: February 1, 2019

Response to draft: February 28, 2019

Final report: March 18, 2019

Final appeal:

Director of Office of Workforce Investment's decision:

## Tami Allison

---

**From:** Colleen Padilla <colleen@soredi.org>  
**Sent:** Wednesday, March 27, 2019 4:20 PM  
**To:** Jim Fong; Jessica Gomez (jgomez@roguevalleymicro.com)  
**Subject:** Thanks for meeting to discuss the regional strategy, CEDS document  
**Attachments:** Southern Oregon Resiliency, 2-page.docx; Legislative Ask Support Letter for SOREDI-So. Oregon Resiliency Plan.docx; 2015-2019 SOREDI CEDS.pdf

**Importance:** High

Good afternoon Jim and Jessica,

Thanks for making time to meet with me and discuss the regional strategy project. We appreciate your tentative commitment of support for \$2,500. If I can provide more documentation for that request to your corporate board, please let me know. Attached is an updated 2-page brief showing which partners have already committed. I've also attached a template for a support letter to our legislators assuming you will be approved to support our request. I am not sure yet when I will join the City of Medford in Salem with legislators, but I have been asked to be prepared with support letter from all committed partners.

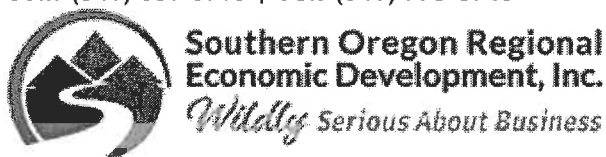
Lastly, Jim and I discussed our "Workforce Observatory" work which is currently outlined in our Comprehensive Economic Development Strategy (CEDS) – the current work plan of sorts that we must report on to the EDA. See page 16 to learn more about that. Having become the executive director in the middle of this particular CEDS, I have some catching up to do on some things. We have time to still implement some great work together in this area, as we discussed. Any updated data from the previous RAMP survey and allied health survey you mentioned would help us appropriately update our next EDA report.

When we complete the regional strategy, it will serve as the next rendition of our CEDS, to cover the 2020-2025 timeframe, and be much more robust with actual tactics, metrics and assigned responsibilities. We truly want a strategic doing documents that is measurable and helps us move the needle for southern Oregon toward our aspirational vision to become the most business-friendly region on the west coast. It will be a heavy lift, no doubt.

Thanks for the hard questions and interest in working on stronger initiatives together. I look forward to hearing back from you soon regarding our support request and additional action items with respect to our collective work with RAMP initiatives, the next manufacturing Summit (September 27 at RCC), and perhaps the resurrection of PowerUp in some refreshed iteration!

Sincerely,

Colleen Padilla  
Executive Director  
1311 East Barnett, Ste. 301 | Medford, OR 97504  
Cell: (541) 601-6918 | Tel: (541) 773-8946



February 22, 2019

Senator Jeff Golden, State Representatives Kim Wallan and Pam Marsh  
Oregon Legislature  
900 Court Street NE  
Salem, Oregon 97528

Dear Senator Golden and Representatives Wallan and Marsh:

(Your Company name here) is pleased to support Southern Oregon Regional Economic Development, Inc. (SORED) and multiple jurisdictions and businesses in our region in a collective funding request of \$300,000 to develop a coordinated regional economic development strategy; one that will identify existing resources while looking at future opportunities to further develop regional strategies that will serve both Jackson and Josephine Counties.

As the EDA appointed Economic Development District, SOREDI is preparing now for its 2020 update of its 5-year Comprehensive Economic Development Strategy (CEDS). The proposed coordinated economic strategy would be completed in conjunction with the CEDS process and link future initiative between both the local needs and federal requirements.

The SOREDI Board of Directors, which includes representation from Jackson County, Josephine County, and the cities of Ashland, Central Point, Eagle Point, Medford, and Talent, has approved moving forward to create a robust and resilient regional strategy that focuses on prioritized needs, strategic-doing tactics, and outcome based metrics.

Southern Oregon lacks a unifying regional approach that celebrates its differences while remaining committed to new business development, tourism promotion, and new investment. The region must be purpose-driven and resilient. No single organization is responsible for economic development and we must position ourselves to collaboratively establish resiliency measures to survive natural disasters such as forest fires and potential earthquakes. In addition, the uncertainty of a rapidly changing world and emerging technologies, demands that we create new strategies to ensure our relevance. To assist in accomplishing this, we are engaging an outside consultancy firm, TIP Strategies, to create a Southern Oregon Resiliency Plan for Long Term Economic Vitality.

The potential and unifying impact of a coordinated strategy between business and government is a huge benefit that affects the entire region comprised of 15 jurisdictions and 300,000 citizens. Further, this coordinated and targeted effort provides the prospect for new companies, investments, and tax revenues that will undoubtedly benefit the entire State of Oregon.

(Your Company name here) is committing \$xxxx for this project to match funds from our other businesses, partners and jurisdictions for a \$450,000 budget for both strategy development and implementation of priorities, once identified. We urge your support and funding. Thank you.

Sincerely,

Your Name, Your Title  
Your Email, Your Phone

## Southern Oregon Resiliency: A Plan for Long Term Economic Vitality

### Southern Oregon Resiliency: A Plan for Long Term Economic Vitality

*Last update: March 26 2019 – \$149,230 in commitments to date.*

**Background:** Southern Oregon is comprised of nearly 300,000 citizens in 15 jurisdictions based in Jackson and Josephine Counties, and **both are distressed counties**. Of the 13 cities, 11 are considered rural.

As the EDA appointed Economic Development District, SOREDI is preparing now for its 2020 update of its 5-year Comprehensive Economic Development Strategy (CEDS).

A recent survey of SOREDI Underwriters in response to “what does business-friendly mean” revealed that 50% of the respondents believe Southern Oregon needs to:

- 1) **Streamline permitting processes** across the region and
- 2) **Attract a younger population** of families and professional workers.

The next four highest priorities identified:  
**Develop a Skilled Workforce (29%); Address Housing Needs (24%); Cultivate Regional Unity (24%); and Provide Incentives for Business Development (21%).**



**The Problem:** Southern Oregon lacks a unifying regional approach that celebrates its differences while also being committed to new business development, tourism promotion, and new investment. The region must be purpose-driven and resilient. No single organization is responsible for economic development and we must position ourselves to collaboratively establish resiliency measures to survive natural disasters such as forest fires and potential earthquakes. We must also take greater strides toward identifying economic threats and creating new strategies to address those threats.

SOREDI recognizes its role to act as the lever that will create large changes through targeted investments and initiatives. The region must be forward-thinking in the development of metrics that go beyond just the scope and functions of SOREDI to include tourism, workforce development, chambers, higher education, every jurisdiction, and the development community. The stakes are high for Southern Oregon as we address how to best position the region for success with a focused approach that is committed to the idea of innovation, upstream technologies, a thriving entrepreneurial culture, talent recruitment, creative housing solutions and workforce development. With an ever-increasing anti-business sentiment and regulation in California, our region is on the cutting edge of attracting new investment to our region and the State of Oregon. It is time to act!

**The Solution:** The SOREDI Board of Directors, which includes representation from Jackson County, Josephine County, and the cities of Ashland, Central Point, Eagle Point, Medford, and Talent, has approved moving forward

**Southern Oregon Regional Economic Development, Inc.**

1311 East Barnett Road, Ste. 301, Medford, OR 97504 | (541) 773-8946 | [www.soredi.org](http://www.soredi.org)

## **Southern Oregon Resiliency: A Plan for Long Term Economic Vitality**

now to **create a robust and resilient regional strategy that focuses on prioritized needs, strategic-doing tactics, and outcome based metrics.** We are engaging the services of an outside consultancy firm, TIP Strategies, to create a Southern Oregon Resiliency Plan for Long Term Economic Vitality.

**Scope of Work:** The expected timeline for this work is 6-8 months, projected to begin as soon as funds are committed for the work. Our intent is not to simply raise funds for the strategy, but raise funds for immediate implementation of key priorities identified. Expected timing is April - November 2019.

The scope of work will include:

- 1) Discovery Phase – document the region’s current position with extensive analytics, 6 – 8 weeks
- 2) Opportunity Phase – stakeholder interviews with all 15 jurisdictions, industries, business groups, and agencies to align community-wide goals and objectives, 6-8 weeks
- 3) Plan Development and Implementation Matrix – identify 2-3 priorities that produce outcomes: robust job growth in existing, new and startup businesses, new capital investment, and reinvigorated communities that celebrate regional successes together, 6-8 weeks

**Project Budget for Strategy and Implementation of Priorities: \$450,000**

**Amount needed (received plus commitments) to proceed with Contract: \$185,000**

**Matching Funds Received: \$122,930** (SORED I - \$25,000, Jackson County - \$36,500; Josephine County - \$25,000, City of Medford \$23,000, City of Ashland \$6,200, City of Eagle Point \$2,600, Town of Butte Falls \$130, Southern Oregon Sanitation \$2,500, Recology \$750, Rogue Disposal \$750)

**Other Committed Funds: \$26,300** (Cities of Central Point, Jacksonville, Rogue River and Talent, Ausland Group, Cow Creek Tribe, Travel Southern Oregon) **Expected Pending Approvals:** (Cities of Cave Junction, Grants Pass, Phoenix, and Shady Cove, Providence Hospital, Rogue Workforce Partnership)

**Expected Partners/Stakeholders:** Jackson County, Josephine County, City of Ashland, City of Cave Junction, City of Central Point, City of Eagle Point, City of Gold Hill, City of Grants Pass, City of Jacksonville, City of Medford, City of Phoenix, City of Rogue River, City of Shady Cove, City of Talent, Town of Butte Falls, Chambers of Commerce, Southern Oregon University, Rogue Community College, Cow Creek Tribe, Coquille Indian Tribe, Travel Southern Oregon, Private Businesses, Rogue Workforce Partnership, Foundations, and Developers

**About TIP Strategies:** The TIP team has crafted innovative strategies for communities and regions across the US and is uniquely qualified to serve as the contractor for this work. TIP has the analytical capacity, experience, and planning expertise to assist SOREDI in strengthening southern Oregon’s position in the global economy. [www.tipstrategies.com](http://www.tipstrategies.com)

**Southern Oregon Regional Economic Development, Inc.**

1311 East Barnett Road, Ste. 301, Medford, OR 97504 | (541) 773-8946 | [www.soredi.org](http://www.soredi.org)



---

DATE: April 10, 2019  
TO: RWP Corporate Directors  
FROM: Ida Saito, Partnership Engagement Manager  
SUBJECT: One Stop Operator

BACKGROUND

The WIOA guidelines require that each local workforce board designate a one-stop operator that coordinates the service delivery of required one-stop partners and service providers. WIOA requires the selection of a one-stop operator through a competitive process, consistent with the Uniform Guidance.

Oregon Manufacturing Extension Partnership (OMEP) currently serves as the One Stop Operator for the Rogue Workforce Partnership. Our contract with OMEP is due to expire on June 30, 2019 and we are currently in the process of evaluating the effectiveness of that contract and looking at other options that might be available.

The Rogue Valley Local Workforce Area MOU defines the duties of the one stop operations as follows:

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.

CRF 361.600 describes those who may operate one stop centers as:

(a) One-stop operators may be a single entity (public, private, or nonprofit) or a consortium of entities. If the consortium of entities is one of one-stop partners, it must include a minimum of three of the one-stop partners described in [§ 361.400](#).



DATE: April 9, 2019  
TO: RWP Corporate Directors  
FROM: Jill teVelde, Workforce Development Manager  
SUBJECT: REVISED - Incumbent Worker Training Policy for Non-WIOA Funds -

**BACKGROUND**

At the request of the Workforce Development Board during the March 13, 2019 meeting, the revised policy removes the following language:

“Not have laid off workers within 120 days, including those relocating to Oregon from another state.”

This new policy closely mirrors the existing WIOA IWT policy and lays the groundwork for establishing a private-public revolving tuition fund.

This policy differs from existing WIOA policy in the following ways:

1. Removes references to WIOA regulations
2. Establishes a 50% employer match requirement
3. Establishes an enhanced training scholarship for growing companies
4. Establishes an application process to access funds
5. Establishes a priority for trainings connected to pre-apprentice and apprenticeship programs
6. Expands industry sectors to include Construction, Transportation and Logistics, and other sectors determined to be in demand by the support of local labor market information.

**SUMMARY**

RWP staff would request that the RWP Corporate Directors approve the attached Revised Incumbent Worker Training policy for non-WIOA Funds.



**TITLE: INCUMBENT WORKER TRAINING FOR NON-WIOA FUNDS**

**Vision and Purpose**

The purpose of this policy is to provide guidance about the use of private-public (non-WIOA) funds available for Incumbent Worker Training (IWT) service activities and other training-related costs for incumbent workers in Jackson and Josephine Counties. The vision of the Rogue Workforce Partnership is to create an even stronger private-public partnership in creating a demand-driven “Up-skill and Backfill” regional workforce system to meet the skills training needs of companies and job/career-seekers. Providing training support for incumbent workers is a critical component in creating such a system. The concept is to meld public-sector workforce funds with private-sector investments in order to fund the requisite training needed to skill-up incumbent workers. We will thus create greater return on these public investments in the form of improved business and economic vitality, skills gains, better career progression and wage growth opportunities for incumbent workers, as well as new employment opportunities for entry-level transitioning and emerging workers.

Part of the intention is to also create a revolving tuition fund with employers to expand the resources for training and other related costs in creating this demand-driven workforce system.

**Policy**

Rogue Workforce Partnership 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.

Governing guidelines will include applicable federal, state and local funding stream IWT requirements.

**Employer Requirements**

Employers must meet the following requirements:

- Apply for funding using the application made available through the Rogue Workforce Partnership.
- Contribute 50% of the training costs as a cash match to RWP. Enhanced training scholarships will also be made available on a case-by-case basis to employers who are not able to meet the 50% match. These limited enhanced scholarships will not exceed the federal incumbent worker training parameters set forth by the United States Department of Labor, under the Workforce Innovation and Opportunity Act.
- Establish a goal, and commit to retain the trained employees for at least 12 months after training, with the exception of unforeseen personnel or other business operational circumstances that would prevent such job retention.
- Is current in unemployment insurance and workers’ compensation taxes, penalties, and/or interest or a related payment plan.
- Provide reports as established by the program guidelines.

### **Employer Eligibility Criteria**

When determining eligibility, RWP 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 sector strategy and/or career pathway strategy;
  - Connection to pre-apprentice and/or ongoing apprenticeship training; 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 six 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.

### **Employer Share of Training Costs**

Employers participating in the program carried out under this policy shall be required to pay a 50% cash match of the cost of providing the training to incumbent workers. An employer may access an additional subsidy by requesting a scholarship on their application. Applications will be reviewed by RWP staff and awarded taking into consideration the factors listed in the previous paragraph, as well as preferences stated below. In the case of a scholarship, the employer's share shall not be less than:

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

Guidelines will be created for the use of these revolving tuition funds by the RWP and/or its Sector Strategies Action Teams / Work Groups.

Preference will be given to IWTs that fall within these categories:

- Companies who utilize WorkSource Rogue Valley to backfill jobs vacated by workers who are moving into more advanced positions in the company;
- 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, Transportation and Logistics, Construction trades, or as determined to be in demand by the support of local labor market information.

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

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

To: Rogue Valley Learning Community  
From: Paul Bellatty  
Subj: Research ideas  
Date: December 31, 2018

Many communities do not have a collaborative group of leaders involved with improving outcomes for children and families; the Rogue Valley group is truly unique and impressive. The Rogue Valley group of social service leaders coupled with data and analytics represents an opportunity to create something special. The following narrative describes ideas and thoughts that can be used to tailor a research agenda that complements the years of foundational work done in Southern Oregon.

**Steps for improving family outcomes:**

1. Identify the outcomes of interest. What are the areas that are most important to your community?
2. Identify milestones that are statistically associated with each outcome (for example, perhaps early self-regulation is a milestone that is statistically associated with later educational achievement).
3. Develop risk/safety algorithms for each milestone.
4. Identify individuals at highest risk of not achieving a positive milestone and collaborate with line-staff to identify opportunities where this information can be used to improve how we serve children and families.
5. Use program/service matching to identify the best treatment options for each family by simulating the effectiveness of numerous available programs for each family.

**These steps would require numerous analytic approaches including:**

1. **Dynamic risk** – Shows how the likelihood of an outcome changes over time for an individual, taking into account events that could increase or decrease the likelihood of that outcome.
2. **Service matching including simulations** – Aligns the most effective service for the most appropriate clients, making sure that we are offering the right service to the appropriate client for the right length of time.
3. **Quantifying program/service effectiveness as though service matching had been used** – By seeing which services would have ideally been offered to past clients and identifying clients for whom none of the available services are effective, DHS can identify service gaps in the system. Informs which services DHS needs to bolster and which clients are not being effectively served.
4. **Incorporating location effects in the models** – Individualizes the results to specific areas and allows communities to see the most intensive locations of need.
5. **Using “fairness” analyses to minimize the effects of bias in the administrative data** – Disproportionate outcomes for different population groups is occurring, introducing a statistical correction to the modeling can help reduce some disproportionate outcomes that are seen in communities.

**Examples of system-level analyses:**

1. Identify when the trajectories toward negative outcomes can be first detected – this may help identify when prevention services are first effective.
2. Use longitudinal database to recognize flow of families through the social service system. Recognize how decisions in one domain influence milestones in other domains.
3. Identify the populations of clients not well served with the existing programs/services.
4. Quantify the effectiveness of particular groups (i.e. schools, providers, etc.).

**Data required for system-level analyses:**

A longitudinal database that includes birth records, child welfare records, TANF/SNAP records, health records, education data, employment data, and corrections data (juvenile and adult), and any additional data needed to track the outcomes identified as most important to the community and services received by individuals in the community. We can start by combining data sources that already exist, and then identify gaps where more data is needed.

**Examples of possible outcomes/milestones:**

- Education – graduation rates, test scores, attendance (absences, suspensions, and expulsions)
- Health – Social and medical complexity associated with ER visits. Size of the groups (healthy, chronic, and acute) by age group
- TANF – number who time out from TANF at 60 months, number earning a living wage after leaving TANF
- Employment – increasing wages between 25-55, number who are earning a living wage
- Number in foster care – per 1000 children
- Corrections – those felony-free per 1000