

Rogue Workforce Partnership ~ Corporate Directors Meeting Agenda



Friday February 14, 2020 • 3:00 to 5:00 p.m. • Woolworth Building - First Floor • 37 N. Central Ave. • Medford

Video/Phone Conference access available at: <https://zoom.us/j/7286917462>. Select your audio preference: **1) Use telephone +1-669-900-6833; Access Code 728 691 7462.**

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	Call to Order (1m) <ul style="list-style-type: none"> Welcome & Introductions 		Jessica Gomez
	Consent Agenda (2-5m) <ul style="list-style-type: none"> Corporate Directors Meeting Minutes December 6, 2019 	▶ Action - Approve Consent Agenda	Jessica
3:05p	Finance & Administration (15m) <ul style="list-style-type: none"> RWP Budget / Actual Reports 6/30/19 & 12/31/19 Annual Audit & State Monitoring Update Endowment Fund Update & Allocation 	▶ Info Update Review, Guidance & Action <ul style="list-style-type: none"> Review Review & Guidance - <i>on process for reviewing</i> Review & Action - <i>approve SORS allocation</i> 	Sherri Emitte Sherri & Jim Fong
3:20p	Title 1B Services - Procurement Prep & Planning (15-20m) <ul style="list-style-type: none"> Adults & Dislocated Workers Youth Procurement 	▶ Update, Discussion, Guidance & Action <ul style="list-style-type: none"> Update - <i>Implementation Status & Next Steps</i> Action - <i>Approve Youth Procurement Process</i> 	Jim & Jill teVelde
3:40p	Strategic Roadmap / Objectives & Key Results (15-20m) <ul style="list-style-type: none"> Local Plan Requirement SOREDI Strategic Plan & RWP Coordination/Alignment 	▶ Info Update, Coordination & Guidance <ul style="list-style-type: none"> Update - <i>Strategic Roadmap Implementation</i> Review Draft SOREDI/RWP Work Plan 	Jim & RWP Team
4:00p	Membership Configuration Changes (20-30m) <ul style="list-style-type: none"> Adding addition Labor & Business representation 	▶ Discussion, Deliberation & Action <ul style="list-style-type: none"> Action - <i>Recommended to Workforce Board</i> 	Jim, Jessica
4:25p	Learning Community / Predictive Analytics (20-25m) <ul style="list-style-type: none"> Rogue Valley Regional Pilot Oregon Business Council & Opportunity Insights 	▶ Info Update, Discussion & Guidance <ul style="list-style-type: none"> Review & Feedback - <i>on Big Data analysis</i> Discuss - <i>OBC/Opportunity Insight partnership</i> 	Jim
4:45p	Sector Strategies - Training Investment Policy (3-5m) 	▶ Update & Guidance - Affirmation on staff's proposed deferral on this work until data is run	Jim, Jessica
4:50p	Legislative Advocacy & Policy Alignment (15-20m) <ul style="list-style-type: none"> State Legislature Advocacy Federal Advocacy 	▶ Update & Discussion <ul style="list-style-type: none"> \$4.1 M request, Southern Oregon Caucus Washington DC November visit & follow-up 	Jim, Jessica
4:55p	Agenda Prep for March RWP - Workforce Board Meeting	▶ Identify - agenda items for March meeting	Jim, Jessica
5:00p	Adjourn		Jessica

= Handout attached or will be handed-out at meeting or displayed on screen

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 & ROGUE VALLEY WORKFORCE CONSORTIUM

December 6, 2019 ♦ 37 N. Central Ave. - Board Room ♦ Medford, OR

MEMBERS PRESENT

Chair Jessica Gomez*
Vice-Chair Mike Donnelly*
Commissioner Bob Strosser
Commissioner Darin Fowler
Nikki Jones
Shawn Hogan*

MEMBERS ABSENT

Robert Begg

OTHERS PRESENT

Jim Fong, Executive Director, Rogue Workforce Partnership
Sherri Emitte, Chief Finance and Administrative Officer, Rogue Workforce Partnership*
Jill teVelde, Workforce Development Manager, Rogue Workforce Partnership
Tami Allison, Senior Project Manager, Rogue Workforce Partnership

**indicates that individual joined remotely.*

Quorum Present: Yes

Before the meeting was called to order, Jim talked about the format of today's meeting and the membership topic that will require actions by both the Corporate Directors as well as the Rogue Valley Workforce Consortium.

1) Call to Order

The RWP Corporate Directors meeting was called to order by Chair, Jessica Gomez and the Rogue Valley Workforce Consortium Meeting was called to order by Chair, Commissioner Darin Fowler at 2:35 P.M. A round of introductions were made.

2) Consent Agenda

Nikki Jones moved to approve the consent agenda consisting of the October 17, 2019 Corporate Director's meeting minutes. The motion was seconded by Commissioner Bob Strosser. The motion passed unanimously.

3) RWP Membership

A request was made by the Department of Human Services (DHS) to replace their current representative on the RWP Workforce Board, Melissa Wolff, with newly-hired Self-Sufficiency Program/Child Welfare District Manager Kim Whitney.

Jim was able to meet with the newly-hired Medford School District Superintendent Bret Champion, who indicated his eagerness to join the workforce Board.

Since Catherine Goslin, Rogue Valley Manor, has tendered her resignation from the Workforce Board, we will build her vacancy into our member replacement strategy.

The request is to approve Kim Whitney and Dr. Bret Champion as RWP Workforce Board Members.

Mike Donnelly moved to recommend to the Rogue Valley Workforce Consortium that Kim Whitney and Dr. Bret Champion be appointed to the RWP Workforce Board, and that a replacement be found for Catherine Goslin. The motion was seconded by Shawn Hogan. There was no discussion and the motion was passed unanimously.

Commissioner Bob Strosser moved to approve the recommendation from the RWP Corporate Directors as stated above. The motion was seconded by Commissioner Darin Fowler. There was no discussion and the motion passed unanimously.

4) Adult & Dislocated Worker Employment & Training Services Procurement Update

This topic was introduced at the last Corporate Directors' meeting. Jim provide a synopsis of this last previous discussion. Every 4 to 6 years, federal regulations require that RWP conduct a process for procuring the training and employment services we directly contract for that are funded the Title IB. This includes services to Adult / Dislocated Workers and at-risk Youth, predominantly out of school youth ages 16 to 24. We are at the stage in our cycle where we need to procure for all of these services that would begin starting July 1st, 2020, so we need to start the procurement process now in order to have service providers in place on time.

Our current service providers are:

- Adult / Dislocated Worker ResCare
- Out of School Youth ResCare
- In School Youth College Dreams

In the majority of circumstances across the state and nation, this would be done via competitive procurement using a Request for Proposal (RFP) process. However, since this is the first time we have gone out for procurement since closing down The Job Council in 2015, RWP staff have been contemplating where we are at in the evolution of the systems transformation efforts related to the totality of the public workforce system, and all of its various partner agencies and organizations.

Jim noted that in many states, OED is the WIOA Title 1B service provider; but it has never been that way in Oregon. Jim went on to explain that OED is unique in that they have a carve-out of UI Trust Fund (SEDAF) money that is used to fund staff in their offices. The goal of this proposal is to leverage as much as we can of those resources in order to free up WIOA 1B dollars for training.

The RWP Corporate Directors', at their October 17, 2019 meeting, authorized staff to continue pursue this concept, conduct a feasibility assessment and cost-benefit analysis and proceed with brining any appropriate recommendation for action by the full Workforce Board at its next quarterly winter meeting, now scheduled for December 13th. In subsequent discussions with the Higher Education Coordinating Commission- Office of Workforce Investment (HECC-OWI), they recommended that make one change to our current procurement policy, which necessitated the need to meet with the Corporate Directors again prior to bringing this action item to the full Workforce Board.

A PowerPoint presentation was given to the Corporate Directors describing the results of the feasibility assessment and cost/benefit analysis, along with the recommended action to procure these services with OED through this non-competitive method. Jim also shared that, that a meeting was being scheduled with ResCare leadership early the next week to update on this upcoming recommendation.

Jessica inquired as to whether we have talked to DHS about their thoughts on continuing their contract with ResCare. Jim indicated that he doesn't feel this would change as they went out for RFP last year and selected ResCare for a two-year (biennium) contract. And that he would be contacting DHS and other partners to alert them to these proposed changes.

Jim went on to explain that there has been a long history of many federally-funded programs starting in 1918 that have created a highly-fragmented set of siloed services, and this is an opportunity for us to streamline and innovate. The state OED leaders in Salem indicated that if they are going to do a pilot, that our region is best positioned for it. HECC-OWI is very supportive of this proposal as well, in that they see that it furthers the integration efforts to create a more streamlined, cost effective and sustainable system. We have also been documenting the process along the way to be able to share it with other regions.

Although the exact numbers on personnel costs are still being crunched, it's have estimated an annual savings in the range of \$50,000 to 150,000 annually. Shawn suggested quantifying the 50% decrease in federal funds, as well as quantifying the improvements we will see (i.e. serving more people, serving people faster, etc.). Jim feels it is possible to quantify more training dollars being spent and more people being trained; however, it would be a little harder to quantify the decrease in federal funds. Jessica asked about the cost savings, as well as having public employees provide the Title 1B services, and how quickly the cost savings could be diminished due to increased staff costs. Jim indicated that his sense was that this is 7-10 years out at worst and we could continue to see savings past this time. Plus if higher OED staff costs become an issue, we can always go back out for procurement and seek another Title 1B service provider. The other ingredient that has not been quantified is the cost of turnover with ResCare; new staff, loss of knowledge, etc. comes with a high price tag in terms of operational function, continuity and quality of service, etc. How much of the increased staff costs will translate to higher quality staff? Nikki stated that she feels that although the cost savings is not significant, the ultimate goal is to provide better, sustainable services.

Sherry indicated that RWP has been processing with OED at the state level the questions around service and staffing levels, and she will have more information available in the near future about the number of staff needed in each office. OED cannot leverage all their staff to replace ResCare's 1B staff, and 4-5 people will need to be hired locally, with the possibility of one additional person at the state office. Sherry also talked about the transition with infrastructure; and even though it is a separate issue, it is in alignment with our goal of saving funds to put toward more training. "We will be paying pennies on the dollar by allowing OED to take over the facility leases", Sherry stated. It was clarified that the infrastructure transition will take place regardless of the outcome of the non-competitive procurement.

The action before the Corporate Directors is to recommend the proposal be taken to the full workforce board. Shawn Hogan moved to recommend taking the proposal for a non-competitive procurement to the full Workforce Board. Mike Donnelly seconded the motion. There was no further discussion. The motion was passed unanimously.

5) Revision to RWP Procurement Policy

Sherry presented a revised procurement policy that includes the following changes:

- It was brought to our attention by HECC/OWI that our policy inadvertently referred to HECC/OWI under its former name of “Department of Community Colleges and Workforce Development”, and strongly suggested that we make the revision. Page 4 of the policy reflects this change.
- On page 3 of the policy we corrected Sherri Emitte’s title.

The action before the Corporate Directors is to approve the revised policy. Mike Donnelly moved to approve the revised policy as stated. The motion was seconded by Nikki Jones. There was no further discussion. The motion was passed unanimously.

6) At-Risk Youth Employment & Training Services Procurement Update

Jim reported that RWP staff are processing and planning with other youth service providers in the community to collaborate around the services that we would like to see provided to at-risk youth. More information will for forthcoming.

7) Adjourn

With no further business, the RWP Corporate Directors and Rogue Valley Workforce Consortium meetings were adjourned at 3:35 p.m.

Respectfully Submitted,

Tami Allison
Senior Project Manager

Approved

Date

Jessica Gomez, RWP Chair

DATE: February 7, 2020

TO: Rogue Workforce Partnership Corporate Directors

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: Budget/Actual Reports for the Year Ending 6/30/19 and Six Months ending 12/31/19

We wanted to share with you our Budget to Actual Income and Expense activity for the 12 months ending 6/30/19, and for the six months ending 12/31/19. The following analyses touch on line items that have the more notable variance.

YEAR ENDING 6/30/19

As a whole, we received and spent about 72.8% of our available funds, including 70.6% of our WIOA funds. This is not unusual since we show the entire amount available within the budget, including the anticipated “Carry Out” into the subsequent year; but the actual expenditures do not include any Carry Out. In addition, since we operate on a reimbursement basis, we would be recognizing income only to the extent of our expenditures.

INCOME

- Within WIOA income, we spent less than the budgeted amount of income within the High Concentration of Eligible Youth fund; but we have plans to spend those additional amounts in the current year.
- The Additional Assistance funds (for Pacific Crest Transformers) was shown in its last six months of existence. We ended up not needing as much as we were allocated, so returned the balance to the State.
- The three grants received from the State’s Workforce Talent Development Board (WTDB) – CPT Training, Mechatronics Training, and Caregiver School of Learning – were originally expected to be entirely spent by 6/30/19. However, the State gave us a spending extension, so we were able to roll the balances into the current year budget.
- In Rethinking Job Search funds, we were able to access some additional funding at the end of the grant.
- In the TANF Summer Jobs Program, once again the poor structure of the State’s grant roll-out resulted in our underspending this grant. This has happened several years now, and we’ve decided not to request these grant funds again until the structure can be improved.
- Rental Income is lower than anticipated since we had the opportunity to close two facilities early (the Grants Pass Annex and the Bartlett Street facility).

EXPENDITURES

- Contracted Services (which does not include Contracted Workforce Services) were higher than expected due to the unbudgeted additions of the Second Chance Tour, the Spring Shindig, the Transportation/Logistics sector, and the services of John Bowling.
- Insurance costs were, for some reason, merely underbudgeted.
- Client Costs, which were made up of expenditures within the three WTDB grants, show as underexpended because of the grant extension opportunity referenced in Income above. We were able to spend the balance of these funds in the current program year.
- The “Other Costs” overexpenditure is made up of several items, the most notable being the nearly \$15,000 in investment loss within the Endowment Fund investment. The good news is that we have been able to make that up within the current year. A larger part of the balance of the excess expenditures were due to flyers and PayPal fees within the WTDB grant activity.

SIX MONTHS ENDING 12/31/19

INCOME

- The overall WIOA income received is at 34.4%, which is reasonable. The percentages between the Adult and Dislocated Worker (DW) funds are skewed, however, because of a change in methodology within the iTrac data system on when a service is considered countable. In previous years, the allocation between Adult and DW expenditures was consistently 28% and 72% respectively. Because of this change in methodology, our allocation is running around 39% and 61% respectively. And if we look at the expenditure rate of Adult and DW together, the rate is about 31%, which again, is reasonable.
- The High Concentration of Eligible Youth funds still have yet to be spent; but we have plans to spend those within the next few months, since the funding expires on 6/30/20.
- For various reasons, we have had a slow start on the Work Experience and US Forest Service grants. We expect activity to pick up as the year progresses.
- Expenditures within the Industry Engagement grant have been overallocated to this fund. We expect to reclassify some of the personnel expenditures into other funding sources.
- We haven't spent the balance of the CPT and Mechatronics grants, but expect to by the expiration date of 6/30/20.
- The Careers in Gear donations are understandably low as of 12/31, since donations normally come in closer to the event date. However, having said that, at this point it looks like we may end up around \$1,500 less than our budgeted amount.
- Miscellaneous Income is over 157% of budget for a good reason. After last year's negative investment performance, I conservatively projected a zero net investment return. However, through December, we've seen a gain of over \$40,000. I'm very happy to be off on my projections in this case!

EXPENDITURES

- The percentage of Contracted Services spent is greater than expected since we have already paid \$30,000 in full for our annual audit.

- The percentage of Insurance costs is greater than expected since most of these payments are made in full at the beginning of the year.
- The One Stop Operator expenses are at only 7.8% because of our getting a slow start in the implementation of our new One Stop Operator Consortium activities.

If you have any questions about either of these Budget/Actual reports, I will be glad to answer your questions at the board meeting.

**ROGUE WORKFORCE PARTNERSHIP
BUDGET/ACTUAL FOR THE YEAR ENDING 6/30/19**

	BUDGET	ACTUAL	PERCENTAGE
REVENUES			
WORKFORCE INNOVATION & OPPORTUNITY ACT			
Title 1B Adult	956,778	609,243	63.7%
Title 1B Dislocated Worker	1,611,408	1,151,089	71.4%
Title 1B Youth	1,306,687	995,174	76.2%
High Concentration of Eligible Youth	72,383	32,441	44.8%
Additional Assistance (Pacific Crest Transformers)	6,587	2,340	35.5%
WIOA SUBTOTAL	3,953,843	2,790,287	70.6%
OTHER INCOME			
Work Experience	277,171	220,823	79.7%
Competitive Strategies	87,200	87,209	100.0%
Industry Engagement	86,021	84,394	98.1%
CPT Training	75,000	56,211	74.9%
Mechatronics Training	50,000	15,106	30.2%
Caregiver School of Learning	72,000	40,614	56.4%
US Forest Service	6,896	3,503	50.8%
Careers in Gear (Donations)	12,500	14,770	118.2%
Careers in Gear (Endowment Fund)	7,506	7,368	98.2%
Rethinking Job Search	17,375	22,091	127.1%
TANF Summer Jobs Program	35,311	29,728	84.2%
Miscellaneous Income	81,080	43,306	53.4%
Rental Income / Cost Reimbursements	373,129	322,440	86.4%
OTHER INCOME SUBTOTAL	1,181,189	947,563	80.2%
TOTAL REVENUES	5,135,032	3,737,850	72.8%
EXPENDITURES			
Operating Expense			
Facilities	509,813	460,309	90.3%
Contracted Services	87,988	104,586	118.9%
Dues	14,332	13,718	95.7%
Training, Travel, Events	35,705	25,997	72.8%
Moving Costs / Furniture	55,000	47,186	85.8%
Insurance	12,035	16,062	133.5%
IT / Telephone / Copiers	131,546	104,228	79.2%
Client Costs	228,793	71,778	31.4%
Data Processing (iTrac)	39,879	30,806	77.2%
One Stop Operator	50,000	50,000	100.0%
Other Costs	9,500	31,098	327.3%
Total Operating Expense	1,174,591	955,768	81.4%
Personnel	733,966	688,164	93.8%
Contracted Workforce Services	2,510,272	2,093,918	83.4%
Holdback / Carry Out into the following year	716,203		
TOTAL EXPENDITURES	5,135,032	3,737,850	72.8%

**ROGUE WORKFORCE PARTNERSHIP
BUDGET/ACTUAL FOR THE 6 MONTHS ENDING 12/31/19**

	BUDGET	ACTUAL	PERCENTAGE
REVENUES			
WORKFORCE INNOVATION & OPPORTUNITY ACT			
Title 1B Adult	783,797	323,908	41.3%
Title 1B Dislocated Worker	1,754,884	459,566	26.2%
Title 1B Youth	1,048,232	463,940	44.3%
High Concentration of Eligible Youth	39,853	0	0.0%
WIOA SUBTOTAL	3,626,766	1,247,414	34.4%
OTHER INCOME			
Work Experience	195,478	4,628	2.4%
Competitive Strategies	78,380	32,742	41.8%
Industry Engagement	79,992	72,028	90.0%
CPT Training	0	18,789	-
Mechatronics Training	0	34,894	-
Caregiver School of Learning	0	274	-
US Forest Service	10,364	0	0.0%
Careers in Gear (Donations)	12,500	2,400	19.2%
Careers in Gear (Endowment Fund)	8,000	0	0.0%
Miscellaneous Income	27,880	43,884	157.4%
Rental Income / Cost Reimbursements	215,476	102,069	47.4%
OTHER INCOME SUBTOTAL	628,069	311,708	49.6%
TOTAL REVENUES	4,254,835	1,559,122	36.6%
EXPENDITURES			
Operating Expense			
Facilities	290,029	156,466	53.9%
Contracted Services	80,647	46,750	58.0%
Dues	14,332	3,990	27.8%
Training, Travel, Events	35,705	22,561	63.2%
Insurance	12,035	8,602	71.5%
IT / Telephone / Copiers	94,756	48,650	51.3%
Client Costs	200,000	64,544	32.3%
Data Processing (iTrac)	40,000	14,196	35.5%
One Stop Operator	30,000	2,342	7.8%
Other Costs	16,700	5,622	33.7%
Total Operating Expense	814,204	373,723	45.9%
Personnel	745,253	321,987	43.2%
Contracted Workforce Services	1,980,500	863,412	43.6%
Holdback / Carry Out into the following year	714,878		0.0%
TOTAL EXPENDITURES	4,254,835	1,559,122	36.6%

DATE: February 7, 2020
TO: Rogue Workforce Partnership Corporate Directors
FROM: Sherri Emitte, Chief Finance and Administrative Officer
SUBJECT: State Monitoring Report and Audited Financial Statements

During this last Fall, we went through our annual State Monitoring (performed by the State's Higher Education and Coordinating Commission – Office of Workforce Investments (HECC-OWI), and our Financial Audit (performed by KDP, LLC), and I wanted to give the Board an update and copies of the reports.

STATE MONITORING

As for the headline, the most important part of this three-page report is located in the middle on the first page – *“This draft report cites no observations and no findings.”* This statement is what we expect every year, but it's always nice to see it in print.

Besides the usual compliance testing on policies, contracts, and financial matters, the HECC-OWI staff spent a good amount of time reviewing the RWP Bylaws, the Rogue Valley Workforce Consortium Intergovernmental Agreement, and the Partnership Agreement between RWP and the Consortium. This was a body of work that the state staff were performing last year all over the state in order to determine whether or not all pertinent documents were properly aligned.

As you will see in the monitoring report, there were several items of misalignment between our various documents. This was anticipated due to the fact that the federal regulations for the Workforce Innovation and Opportunity Act did not get published by the U.S. Department of Labor until well after our new organizational structures, intergovernmental agreements and by-laws were put into place as a first step to be in compliance with new law. All the workforce regions in Oregon have these same realignments to implement, and the monitors told us that that was their focus throughout the state this year.

Tami and I had already identified and were working on these inconsistencies, so they didn't come as a surprise. Even though she and I had planned on working to straighten out all of these issues, we were trying to fit it in “as we had time,” which doesn't happen too often. The fact that these issues are now in the monitoring report elevates the urgency to resolve them all, and get any changes approved by the various boards before the next monitoring. Tami and I plan to schedule time to work on these, and will be submitting them for approval by the boards in coming months.

AUDITED FINANCIAL STATEMENTS

The audit report may be found by clicking [HERE](#). Again, the headline – the auditors’ opinion on the financial statements found at the bottom of page 1 – *“In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Organization as of June 30, 2019 and 2018, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.”*

There is also a separate required opinion at the bottom of page 19 regarding the Schedule of Expenditures of Federal Awards (SEFA) found on page 21 – *“In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on each of its major federal programs for the year ended June 30, 2019.”*

If you were to compare this year’s report with the previous years, you would note a few changes brought about by new auditing standards:

- You’ll see on the Statement of Activities on page 4, the columns are entitled “Without Donor Restriction”, and the note about this under “Basis of Accounting” on page 7. This is not really a concern for us since we have no donor restrictions.
- There is a new required report called “Statements of Functional Expenses” that you’ll see on page 5, as well as the accompanying note on pages 9 and 10. This is a new requirement to enable the reader to see how much a non-profit is spending on program services versus management and general services.
- You’ll also see the addition of an “Investments” paragraph in Note 1 on page 8, and two other new required notes -- Note 3 on page 11 regarding “Availability and Liquidity,” and Note 6 on page 14 regarding “Fair Value of Financial Instruments.” Both of these were added due to our transferring of funds to an investment account.

These are the highlights of the audit report. But if you have any questions about any part of the report, I will be available to answer any questions.

DRAFT Monitoring Report
Program Year 2018 (*July 1, 2018 - June 30, 2019*)

The State of Oregon's Higher Education Coordinating Commission - Office of Workforce Investments (HECC-OWI) conducted its annual on-site monitoring review of Rogue Workforce Partnership (RWP) on October 22, 23, and 24, 2019.

The reviewers conducted tests of compliance for elements included in the Uniform Administrative Requirements, the Workforce Innovation and Opportunity Act (WIOA) and final regulations, RWP policies and standard operating procedures, and the nondiscrimination, disability, and equal opportunity requirements in WIOA.

The entrance conversation took place on October 22, 2019, and attendees included Duane Ritchie, Linda Sozzi, Theresa Fitzgerald, Tami Allison, Sherri Emitte, Jill teVelde, and Jim Fong.

This report cites the results of our tests of compliance and review of policies and processes. The monitoring team relies on the following definitions:

• 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 draft report cites no observations and no findings.

Reviewers relied on documentation and materials provided by RWP catalogued in the monitoring review guide.

RWP provided the Financial Statements and Single Audit Information for the years ended June 30, 2018 and 2017. No internal control deficiencies, questioned costs, or other issues were noted.

Tests of compliance were conducted on policies and procedures, expenditure rates, quarterly financial reporting, travel reimbursements, contracts and procurement, separation of duties, payroll, and subrecipient monitoring. RWP's fiscal system of expenditure authorization and record keeping is sufficient and provides reasonable accounting control over assets, liabilities, revenues, and expenditures in connection with those funds.

Reviewers note that some elements are misaligned or absent from the Bylaws of the Rogue Workforce Partnership (December 15, 2016), the Partnership Agreement Between the Rogue Workforce Partnership and the Rogue Valley Workforce

Consortium (June 11, 2015), and the Intergovernmental Agreement Between Jackson County and Josephine County Establishing the Rogue Valley Workforce Consortium (May 13, 2015).

The bylaws do not contain information on the nomination process used by the chief elected official to select the local board chair as required in Federal Regulations at 679.301(g)(1).

The bylaws define quorum (page 4, item G) as a majority of members. RWP's Board Membership policy (March 19, 2016) defines quorum (page 2) as 51% of the membership and of those members in attendance, "no fewer than 51% are business representatives." State of Oregon Workforce Programs Local Board Membership Criteria policy requires that quorum be defined as a simple majority and of those members in attendance, "no fewer than 25% are business representatives."

State of Oregon Workforce Programs Local Board Membership Criteria policy also requires that the bylaws define specific criteria used to establish just cause for member removal, "and the steps regarding filing an appeal and arbitration." That information is not included in the Bylaws of the Rogue Workforce Partnership (December 15, 2016).

RWP's Board Membership policy (March 19, 2016) prohibits the use of proxies, "except in special circumstances approved by the RWP Corporate Directors." State of Oregon Workforce Programs Local Board Membership Criteria policy requires that in the event proxies are used, the "proxy must be from the same category of representation/membership as the member."

Bylaws of the Rogue Workforce Partnership (December 15, 2016), allow for the Corporate Directors to amend or repeal the bylaws by an affirmative vote of a majority of the Corporate Directors (page 6, Article VII A).

The bylaws indicate that "workforce board officers shall be elected" during the annual meeting (page 3, Article III, item E2). The bylaws also state (page 2, Article III, item A) that "the workforce board chair and vice-chair...and shall serve in the same capacity as the corporation's chair and vice-chair." Rogue Workforce Partnership Workforce Development Board minutes from the January 17, 2019 meeting indicate that "the process has been that whatever meeting is held first, the officers are elected. At the subsequent meeting the officers (same individuals for both bodies) need to be elected by that body."

The Partnership Agreement Between the Rogue Workforce Partnership and the Rogue Valley Workforce Consortium (June 11, 2015) requires that the RWP Directors "appoint RWP Workforce Board business or economic development representatives" to serve as members of RWP Board of Directors (page 2, item 3 P). Bylaws of the Rogue Workforce Partnership (December 15, 2016), provides that "Directors shall be private sector" board members (page 2, Article III A).

RWP Code of Conduct policy (May 18, 2017) includes language which allows an “interested director/officer” to “make a presentation” at the meeting, and leave the meeting during the discussion and vote (Procedures, 3a). Uniform Administrative Requirements at 200.318(c)(1) provides that “no employee, officer, or agent must participate...on any matter” that could financially benefit them or their organizations. Additional language in the Final Rule at 683.200(c)(5)(i) does not allow a board member to “participate” in any decision making capacity on any matter which would provide financial benefit to that member or that member’s immediate family.

The Intergovernmental Agreement Between Jackson County and Josephine County Establishing the Rogue Valley Workforce Consortium (May 13, 2015) indicates on page one, item 5 that the RVWC “shall adopt bylaws covering meetings and procedures.” The Consortium has not adopted bylaws.

The intergovernmental agreement also requires on page 2, item 11B that agreements with between the workforce board and any grant recipient or administrative agency contain a clause which would require that the RVWC be immediately notified of any claims brought against the board or subcontractors. That clause is not included in the contract boilerplate.

RWP’s Priority of Service policy (July 20, 2017) references that prioritization is in place when “funds are limited.” Final Rule 680.600 requires that priority be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. It does not provide for prioritization to be implemented based on funding levels.

This draft report is being provided on October 24, 2019. RWP staff will have 30 days to develop a response to this draft report, and should direct the response to HECC-OWI. Response items will be considered by HECC staff, and may be incorporated into the final report.

Once the final report is issued, RWP will have one (1) week from the date of the final report to prepare and submit a written appeal to any findings. The appeal will be submitted to the Office of Workforce Investments director, who will make the final decision.

Draft report: October 24, 2019

Response to draft due: November 25, 2019

Final report:

Final appeal:

Office of Workforce Investments director decision:

DATE: February 7, 2020

TO: Rogue Workforce Partnership Corporate Directors

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: Endowment Fund Update at 12/31/19

I'm happy to report that the quarter ending 12/31/19 was a very successful one for our Endowment Fund investment with Sky Oak Financial. You'll see on the attached summary that the realized and unrealized gain/loss for that quarter was greater than \$35,000. That was certainly a welcome reversal from the same quarter from the previous year!

You can also see that the Equities¹ portion of our investment has grown by 9.89% (or 7.42% annualized), and the ETF¹ portion has grown by 7.93% (or 5.94% annualized). The Cash portion shows a decrease of 15.4%; however, that is deceptive since we removed \$7,100 from it for cashflow purposes. But over the past 16 months since we invested these funds at Sky Oak, and even after we removed \$7,100, our investment has still increased by 6.26%.

I've also attached a graph reflecting our total balance over time. It's nice to see the right end of the line swooping upward!

The third attachment is a summary of our Endowment Fund activity, which includes a \$5,073 balance remaining in RWP's Money Market fund for cashflow purposes for the current year. The total balance currently in our Endowment Fund is \$483,231.

The Board of Directors also needs to decide what contributions it may want to make from this Endowment Fund in the current program year. We did budget \$8,000 toward this year's Careers in Gear event; but there is currently also a request from Southern Oregon Success for a \$5,000 contribution that needs to be discussed and decided upon.

I will be available at the Board meeting to answer any questions you may have.

¹ *Equities* represent ownership stakes in corporations. Typical equities may include common stock, preferred stock, foreign equities, and closed-end funds. An *ETF*, or Exchange Traded Fund, is a collection of securities such as equities, bonds, and options that is bought and sold like a stock in real time on a stock exchange.

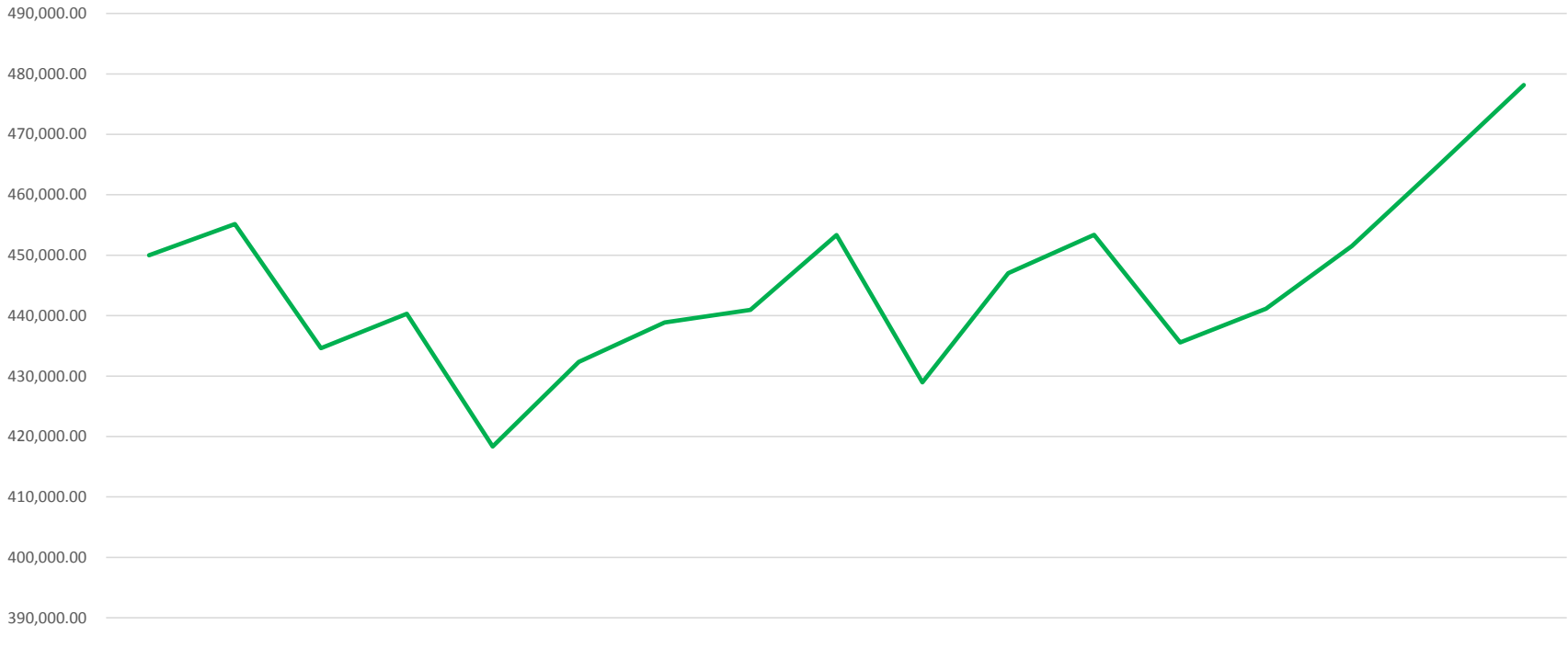
SKY OAK INVESTMENTS**9/7/18 - 12/31/19**

	<u>TOTAL</u>	<u>CASH</u>	<u>EQUITIES</u>	<u>ETF's</u>
Initial Investment 9/7/18	450,000	45,000	202,500	202,500
Inter-Account Transfers	-	10,000	(10,000)	
Transfers for Cashflow Uses	(7,100)	(7,100)		
Interest / Dividends	9,592	168	3,278	6,146
Realized Gain/Loss (Sales)	(6,974)		(3,655)	(3,319)
Unrealized Gain/Loss (Market Value Change)	36,292		21,202	15,090
Management Fees	(3,653)		(1,787)	(1,866)
	-			
Total at 6/30/19	<u>478,157</u>	<u>48,068</u>	<u>211,538</u>	<u>218,551</u>
% Change	6.26%	-15.40%	9.89%	7.93%

Realized and Unrealized Gain/Loss by Quarter:

QE 9/30/18	4,079
QE 12/31/18	(37,462)
QE 3/31/19	21,607
QE 6/30/19	5,195
QE 9/30/19	346
QE 12/31/19	35,553
Total Realized and Unrealized Gain/Loss	<u>29,318</u>

Endowment Fund Balance at Sky Oak Wealth



	9/7/2018	9/2018	10/2018	11/2018	12/2018	1/2019	2/2019	3/2019	4/2019	5/2019	6/2019	7/2019	8/2019	9/2019	10/2019	11/2019	12/2019
Balance	450,000.0	455,166.8	434,601.5	440,299.3	418,347.7	432,354.3	438,859.9	440,937.9	453,333.8	428,944.9	447,017.7	453,385.8	435,583.4	441,127.0	451,493.7	464,744.1	478,157.2

Note: \$7,100 transferred out for cashflow use on 8/29/19

ENDOWMENT FUND BALANCE

		Total	Money Market	Sky Oak
7/1/2018	Beginning Balance	462,819.87	462,819.87	
7/31/2018	Interest	462,851.31	31.44	
8/31/2018	Interest	462,882.75	31.44	
9/7/2018	To Sky Oak	462,882.75	(450,000.00)	450,000.00
9/30/2018	Sky Oak Statement	468,049.59		5,166.84
10/15/2018	Bank Wire Fee	468,008.59	(41.00)	
10/31/2018	Sky Oak Statement	447,443.27		(20,565.32)
11/30/2018	Sky Oak Statement	453,141.08		5,697.81
12/19/2018	Southern Oregon Success	448,141.08	(5,000.00)	
12/31/2018	Sky Oak Statement	426,189.50		(21,951.58)
1/31/2019	Sky Oak Statement	440,196.07		14,006.57
2/28/2019	Sky Oak Statement	446,701.69		6,505.62
3/31/2019	Sky Oak Statement	448,779.65		2,077.96
4/18/2019	SORED I Resiliency Plan	446,279.65	(2,500.00)	
4/30/2019	Sky Oak Statement	458,675.56		12,395.91
5/31/2019	Sky Oak Statement	434,286.73		(24,388.83)
6/30/2019	Sky Oak Statement	452,359.53		18,072.80
6/30/2019	Careers in Gear	444,991.11	(7,368.42)	
7/31/2019	Sky Oak Statement	451,359.15		6,368.04
8/29/2019	To US Bank	451,359.15	7,100.00	(7,100.00)
8/31/2019	Sky Oak Statement	440,656.77		(10,702.38)
9/30/2019	Sky Oak Statement	446,200.37		5,543.60
10/31/2019	Sky Oak Statement	456,567.11		10,366.74
11/30/2019	Sky Oak Statement	469,817.52		13,250.41
12/31/2019	Sky Oak Statement	483,230.53		13,413.01
	Ending Balance	483,230.53	5,073.33	478,157.20

2018-19 CONTRIBUTIONS:

Southern Oregon Success	5,000.00
SORED I Resiliency Plan	2,500.00
Careers in Gear	7,368.42
Total	14,868.42

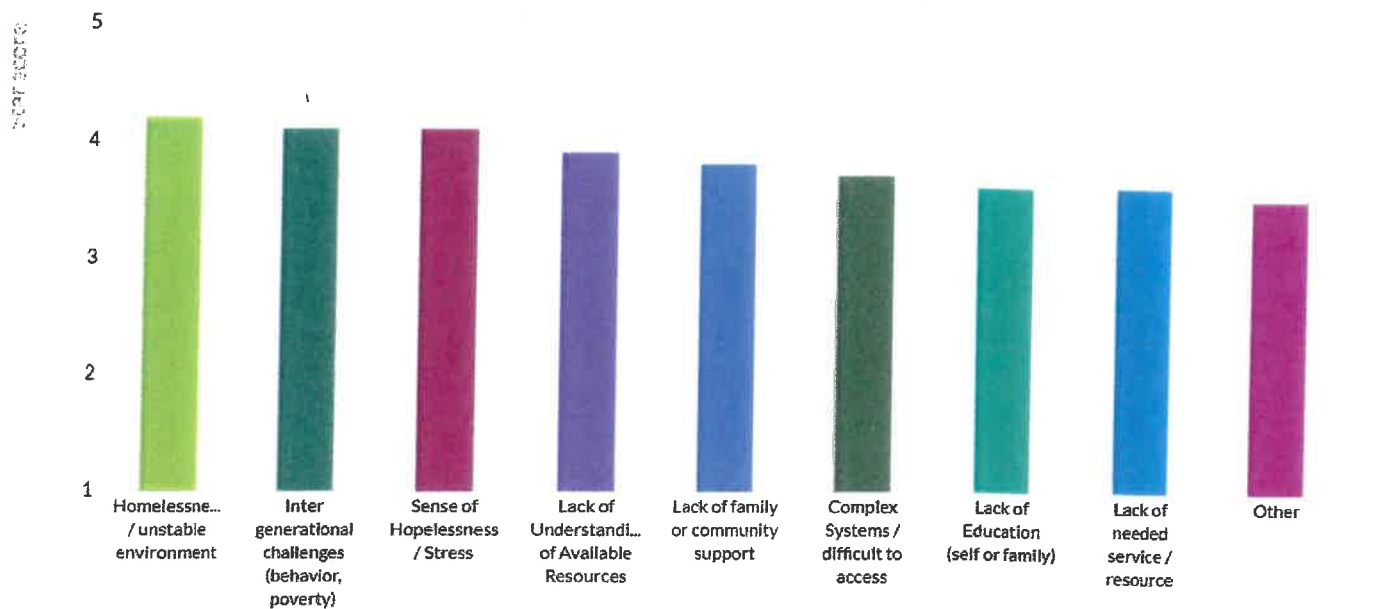
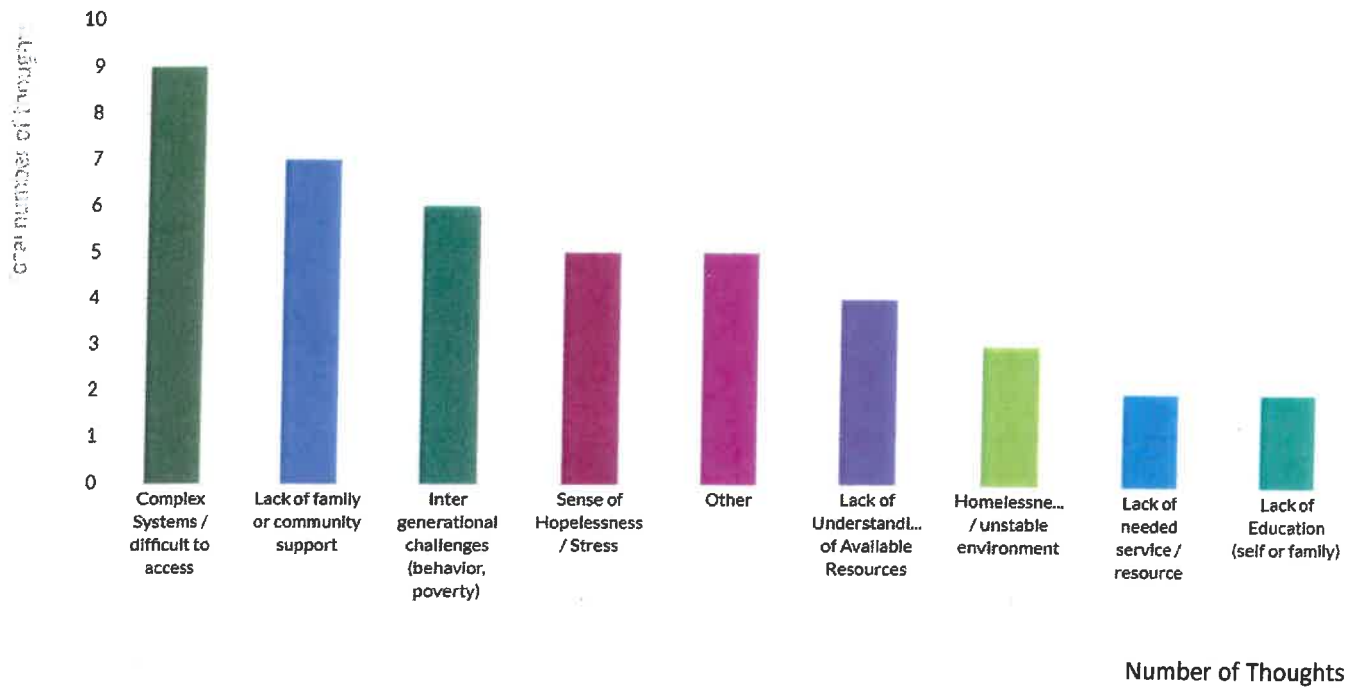
RWP Youth Training & Employment Services

Procurement Process & Schedule for PY 2020

Assessment and Planning Meetings with Partners	Oct, Nov, Jan 31st, Feb 7th
Write RFP	
<ul style="list-style-type: none"> • Fiscal & Administrative – Sherri 2/14 • Program Design, Services, Partnership, etc. - Jill 2/7 or 2/14 <ul style="list-style-type: none"> › Broad brush strokes of what we want › Framing & the questions we’re asking – based on other regions, our prior RFPs • Review, edits – Jim, Jill, Ida, Sherri 2/7 or 2/14 to 2/21 or 2/28 	
Finalize RFP	2/21 or 2/28
Identify Potential Review Team Members	By 2/28
RFP Published, Sent & Available	2/28
Bidders Conference	TBD
Last day to submit questions	4/12?
Form/Convene Selection Review Team	By 4/13
Proposals due	4/13
Review & Evaluate Proposals	4/14-5/3
Intent to award announcement	5/4
Negotiate Contract	5/4 to 6/1
Protest deadline	5/14
Contract draft complete	6/1
Review & Finalize contract	6/1-6/15
Contract out for signatures	6/15
Contract start date	7/1

YOUTH EMPLOYMENT AND TRAINING SERVICES - OCTOBER 25, 2019

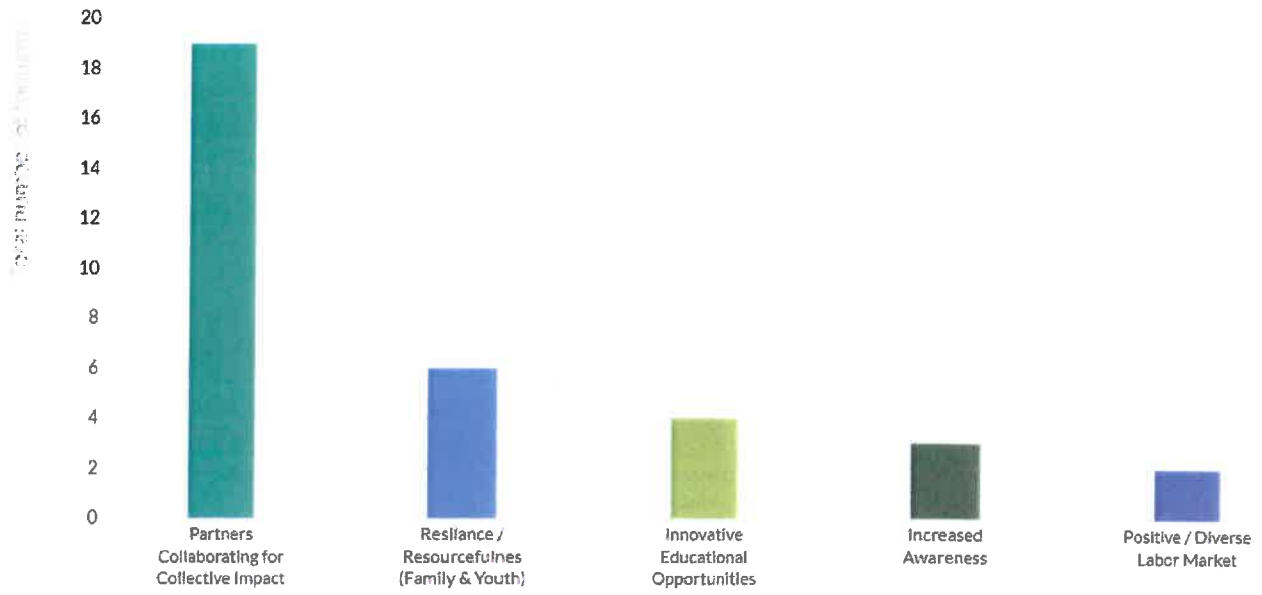
What's the current reality experienced by at-risk youth and their families?



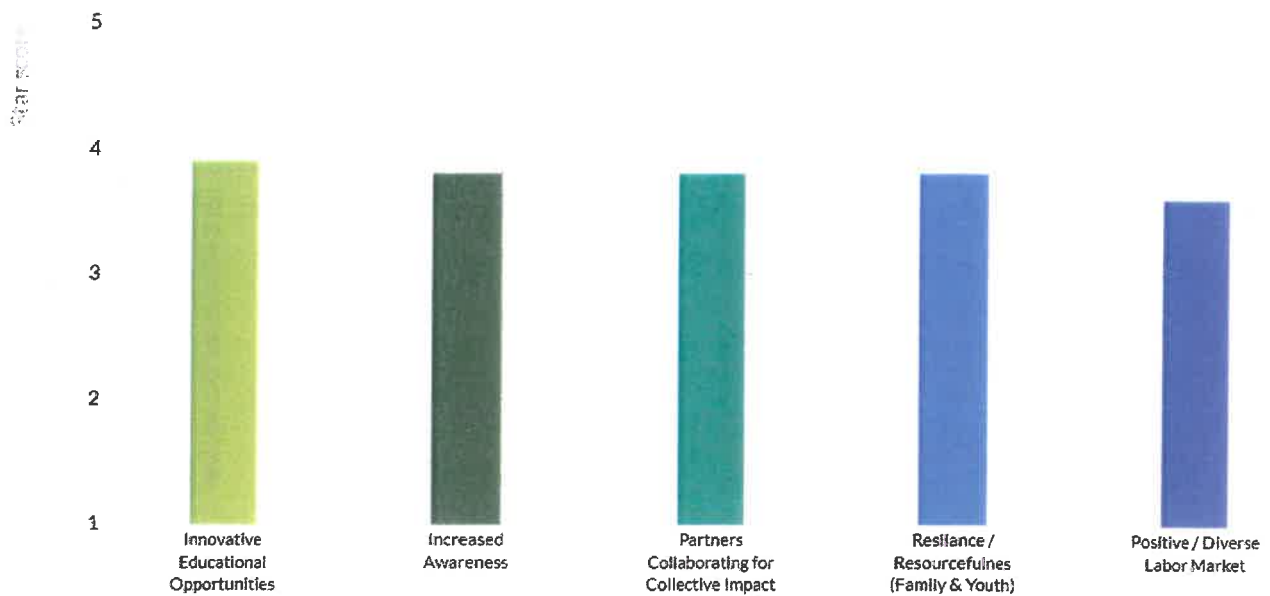
Average Number of Stars

YOUTH EMPLOYMENT AND TRAINING SERVICES - OCTOBER 25, 2019

What are some strengths and opportunities affecting at-risk youth and their families?



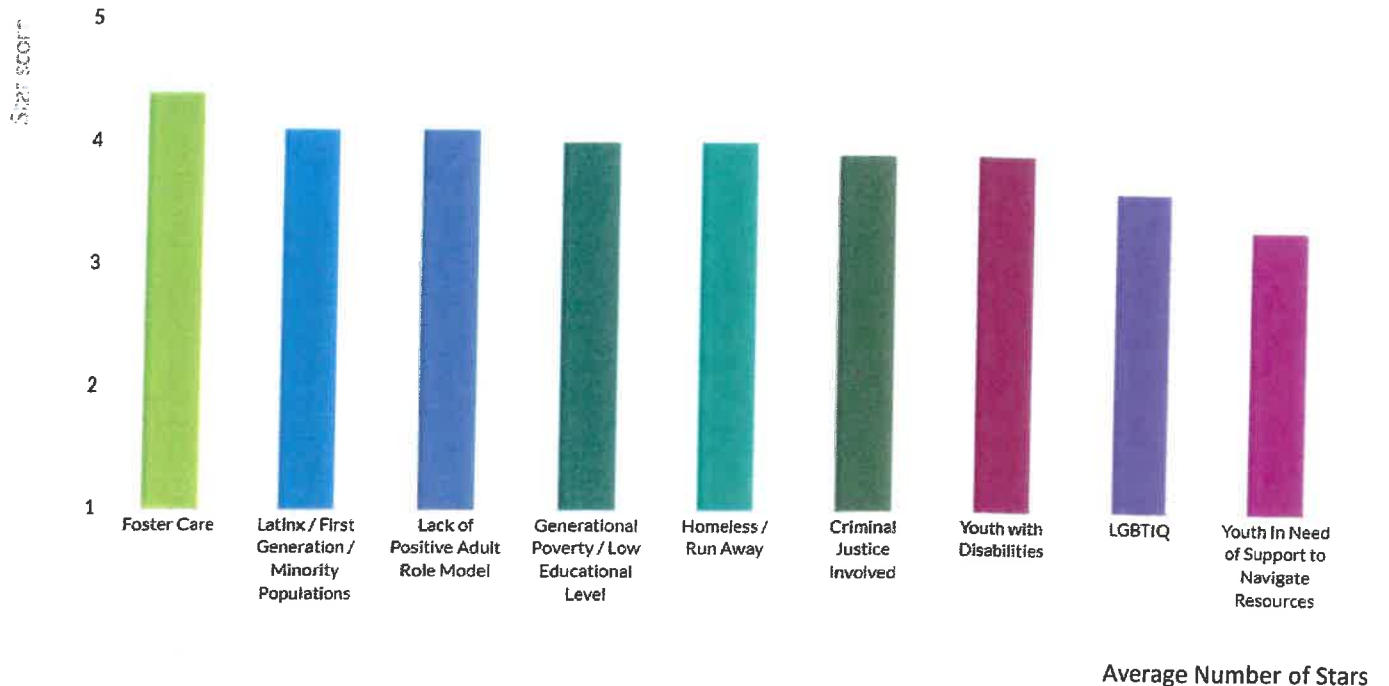
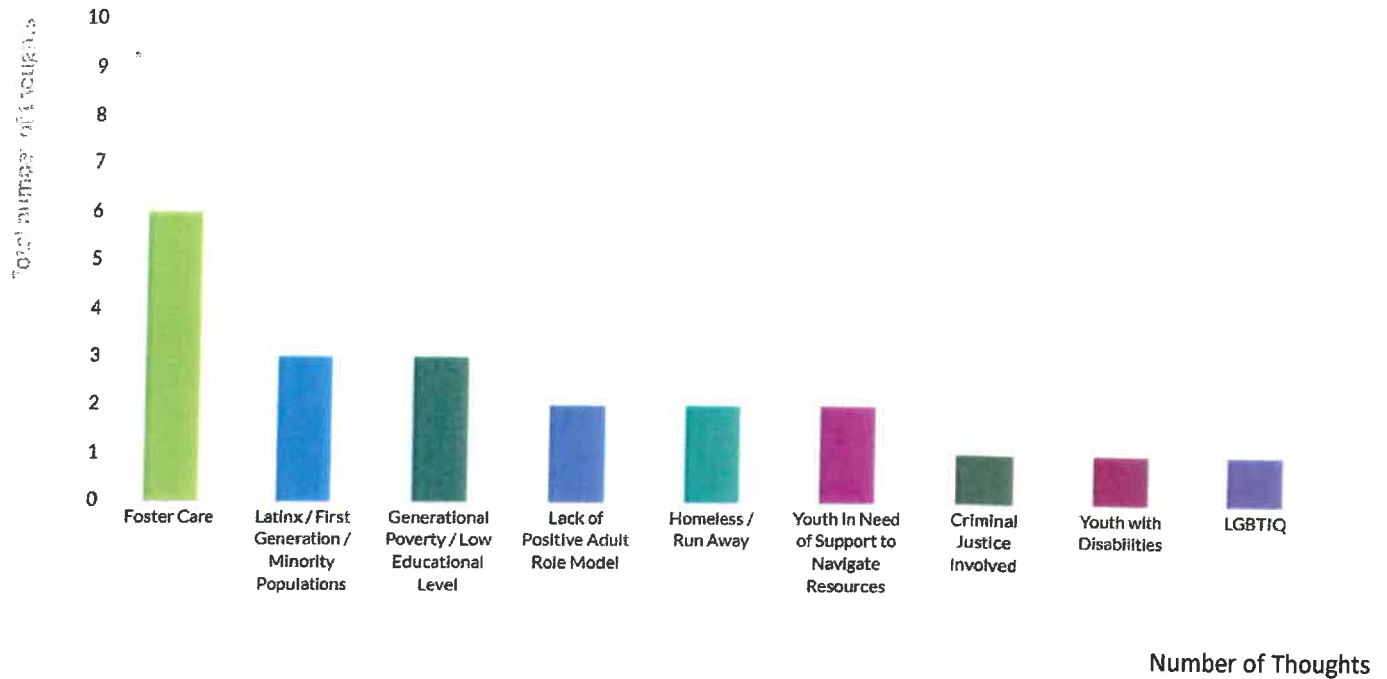
Number of Thoughts



Average Number of Stars

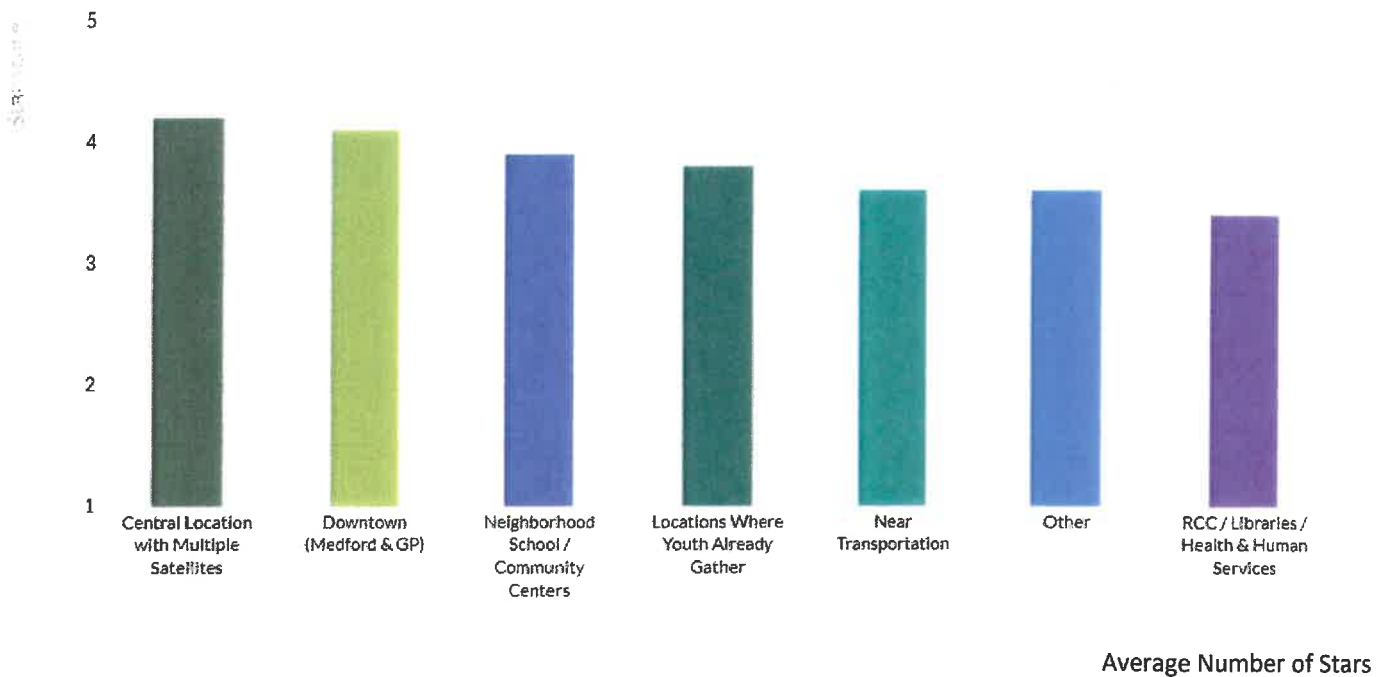
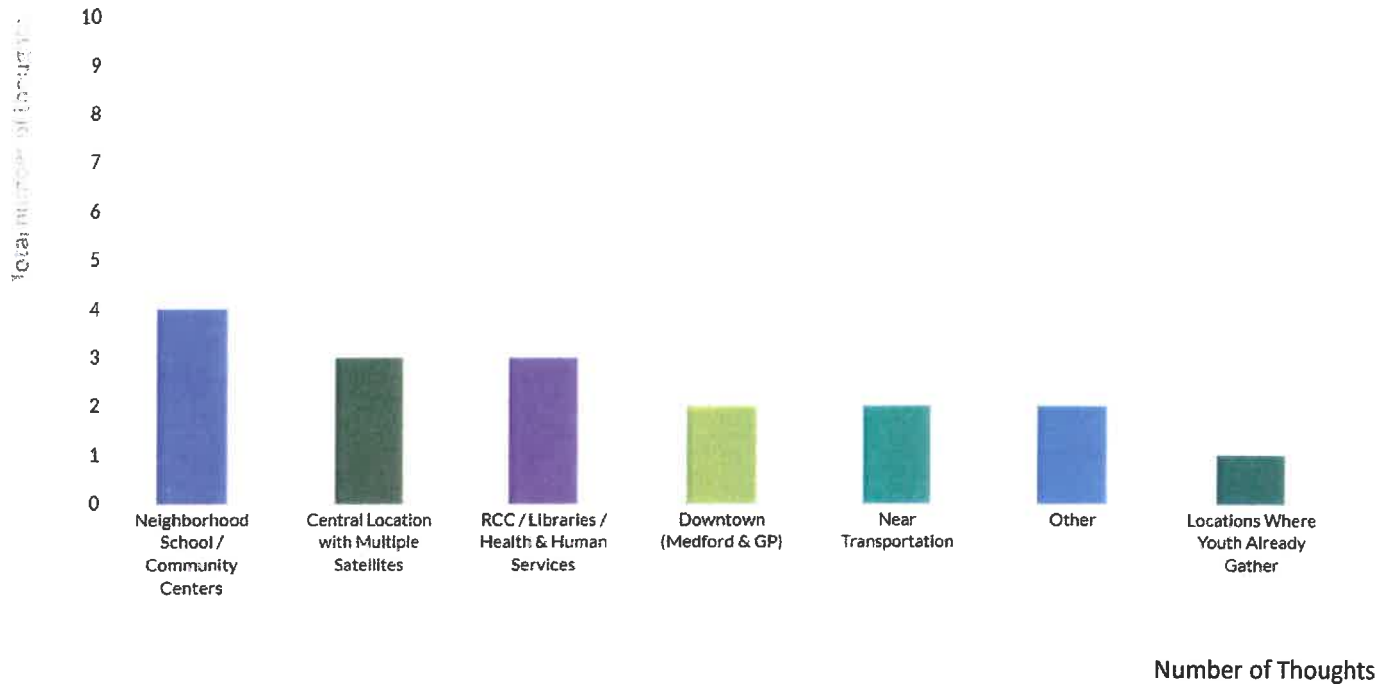
YOUTH EMPLOYMENT AND TRAINING SERVICES – NOVEMBER 22, 2019

Are there any particular sub-populations of At-Risk Youth and Families we should prioritize or target for Training & Employment services?



YOUTH EMPLOYMENT AND TRAINING SERVICES – NOVEMBER 22, 2019

Where and how might At-Risk Youth Training & Employment services best be physically located (or co-located) and configured?



Next Steps in Brainstorming Co-Creative Collaborative Approaches – *What's the Universe of the Possible?*

Planting Ideas – Kickstarting different ways for us to think about how we provide services – community-based vs. organizationally/program-based.

Co-creating together, seeing if this pencils out . . . or not?

- **Leveraged Case Management**
- **Moving from old TJC & current WSRV Out of School Youth model**
 - Providing many of the 14 WIOA required elements in the services provision – activities, classes, case management
 - A whole different way of doing
- **Serve specific high-risk target populations (with existing case managers?) vs. current model of serving who comes thru the door/ hears about the program, gets recruited**
 - Foster Care (DHS & CASA staff support) -
 - Latino / First Generation Minority Populations
 - Lack of Positive Role Model
 - Intergenerational Poverty / Low Educational Level
 - Lack of Positive Role Model
 - Homeless Youth / Runaway (Maslow , Joe's Place)
 - Criminal Justice Involved (OYA, Juvenile Justice)
 - Youth with Disabilities
 - LGBTIQ
 - Youth in Need of Support to Navigate Resources

Title IB services providing specialized Training & Employment services to augment work other partners are already doing.

Leverage partner case manager to create less load on Title IB need for staff to do comprehensive case management

- **Different Weeks / Opportunities for Industry Career Exploration and Personal Effectiveness Skills / Bonding**
 - **Sector Industries Site Tours/Career Highlight Events** - *Manufacturing Week, Healthcare week, Construction week, Transportation/ Logistic week* - curated and led by Title IB staff
 - **Wings – True Colors**
 - **Mindfulness seminars & coaching**
 - **Inner Guide Expeditions**
- **Have cohort-based groups convened**

Name: _____ Organization: _____

<u>Key / Required Elements</u>	Yes - our organization provides this service	No - our organization doesn't provide this service, but here's who we refer / send out youth to for these services
<u>What</u>		
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 equivalency (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 may include: a. Summer employment opportunities b. Opportunities available throughout the school year c. Pre-apprenticeship programs d. Internships and job shadows e. On-the-job training opportunities		
4. Occupational skills training which includes priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area involved.		
5. Education offered concurrently with an in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.		
* 6. Leadership development opportunities, including community service and peer centered activities encouraging responsibility and other positive social and civic behaviors.		
7. Support Services are services that enable an individual to participate in WIOA activities.		
8. Adult Mentoring		
9. Follow-up services for not less than 12 months after the completion of participation.		

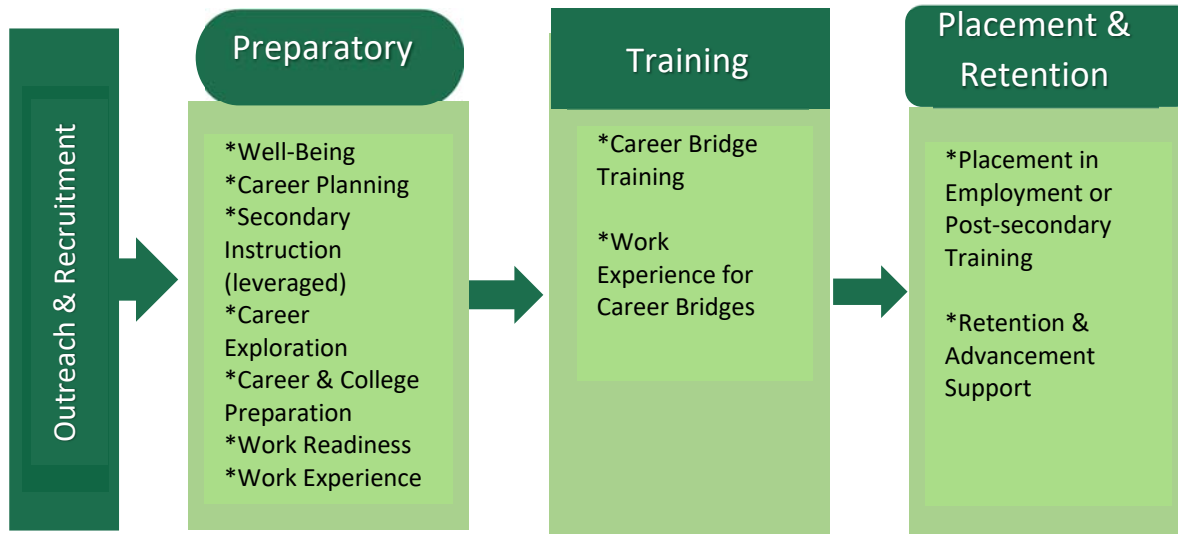
10. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referrals to counseling, as appropriate to the needs of the individual youth.		
11. Financial literacy education.		
12. Entrepreneurial skills training.		
13. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.		
14. Activities that help youth prepare for and transition to post-secondary education and training.		
15. Case Management		
<i>How</i>		
16. Cohort Based and/or Project-Based Learning.		
17. Hands-on / applied learning experiences that help to build resilience.		
18. Strong community collaboration and integration in the delivery of all the service listed above		

Career Bridges: A Youth Workforce System Overview

The focus of the Youth Workforce System is career preparation and training leading to career track employment. A job is considered to be “career track” when it is part of an articulated career path providing opportunities to advance skills and increase earnings, and lead to family-sustaining wages.

Phases of the Program

Participation in the Youth Workforce System is divided into three phases: Preparatory, Training, and Placement and Retention.



Preparatory

In the preparatory phase, youth will work with a Career Coach to develop a career plan. The career plan outlines goals as well as services to help meet these goals. Preparatory activities will include

- Work Readiness
- Career Exploration (Survey of Occupations class using project-based/hands on learning – approximately 1-2 weeks in each of the four industry sectors: Automotive – specifically diesel (?) mechanics, Advanced Manufacturing, Construction, Healthcare, Forestry)
- Leadership Development (to include Service Learning, Community Service, and Civic Engagement)
- Financial Literacy
- Introduction to WorkSource Rogue Valley (WSRV) and employment services offered

Career Coaches may help youth find or retain a transitional job while they are in the program. **At the end of the preparatory period, youth are required to demonstrate readiness for work and training through performance on designated assignments.*** The duration of the preparatory phase will vary for every youth. For most, the preparatory period may last up to a year. Youth who demonstrate early work-readiness can be referred to training in a relatively short period. Youth working on a secondary credential may require additional time. The goal is for all youth to have a high school diploma or GED and an identified career interest by the end of the preparatory phase.

Training

Once youth are work- and training-ready and have identified a career interest, they will select a Career Bridge training in one of the five industry sectors: Automotive – specifically diesel (?) mechanics, Advanced Manufacturing, Construction,

Healthcare, Forestry/Fire Science. Career Bridge is a cohort-based training that includes classroom instruction in technical skills and an internship to practice these skills. Length of instruction ranges from 6 – 11 weeks depending on the industry. Paid internship are generally 200 hours over 6 – 8 weeks at an employer within the selected industry. Successful Career Bridge completion results in an industry-recognized credential, opening access to entry-level positions in the industry. Career Bridge trainings are fully resourced by the Youth Workforce System. We expect at least 75 percent of youth enrolled will enter a Career Bridge training. Youth who do not select a Career Bridge may pursue employment, college or other post-secondary training with support of their Career Coach. However, resources to pay for training or further work experience will not be available through the Youth Workforce System. Training and work experience resources for non-Career Bridge training may be available through the Adult program accessed through WSRV.

Placement and Retention

Career Coaches will provide job search and placement assistance or post-secondary preparatory services until a participant finds employment or enters post-secondary training. Youth seeking employment will be co-enrolled in WSRV. Career Coaches will coordinate access to WSRV services including NCRC testing and other skill validating tools and processes to identify the Youth as a work-ready job seeker. Once assessed as work-ready, the Youth enters into a priority talent pool for job matching. WSRV staff will provide individualized placement services.

After placement in employment or further training, Career Coaches will provide one year of follow-up services to each Youth. The goal of the follow-up services is to help participants succeed in training, retain employment, advance on the job, or move to a new job with higher pay, better hours, or more benefits. Career Coaches should schedule regular meetings and check-ins, and proactively engage with participants. Support services and other staff services may be provided as part of follow-up. Occupational skills training and work experience cannot be provided during the follow-up period.

Program Duration

The total length of the program depends on participant progress in meeting career goals.

Career Coach Partners and Central Service Delivery

Career Coaching Partner Service / Activities	Description
Outreach / Recruitment	Based on target population and/or geographic area. Assistance will be available from WSRV to conduct this activity.
Eligibility Determination	Participants meet requirements of funding sources. Assistance will be available from WSRV to conduct this activity.
Assessment	Determination of services needs and work readiness based on skills, work experiences, employability and participant needs. Assistance will be available from WSRV to conduct this activity.
Enrollment	Final enrollment decision. Youth participants will be enrolled in both the Youth System and in WSRV. A youth may only be enrolled at one Career Coaching provider.
Career Plan Development	Common process and plan – Career Mapping and Resource Planning
Work Readiness Training*	Utilize existing, decide on WR criteria among all partners
Leadership Development	Participant-led activities with focus on service learning, community service, and civic engagement.
Support Services	May include, but not limited to, assistance with books and fees, transportation, work clothing and tools, and incentives tied to work experience training.
Adult Mentoring *	Formal relationship between a youth participant and an adult mentor for 12 months or more. Career Coaches cannot serve as mentors.
Comprehensive Guidance and Counseling	Referral to individualized counseling to address drug, alcohol or mental health issues.
Financial Literacy	Education focused on enhancing financial capabilities and understanding (e.g. budgeting)

Entrepreneurial Skills Training	Education in basics of starting and operating a small business
Post-secondary Preparation	Activities preparing Youth for transition into post-secondary education and training
Job Search and Job Placement Assistance	Support for finding employment and connecting to employment resources. Participants may access WorkSource resources.
Tutoring	Educational assistance leading to completion of requirements for a secondary and post-secondary credential.
Alternative Secondary School *	Services and/or instruction leading to completion of a secondary education credential (HS diploma or GED). <u>Must be leveraged. Contract funds cannot be used to pay for high school or GED instruction ????</u>
Follow-up Services	Services to support retention and success in post-secondary education/training and/or retention and advancement in employment for one year after placement. (NOTE: Occupational skills training and work experience cannot be provided during follow-up.)
Career Exploration *	Project-based learning in five key industry sectors using common curriculum and courses by a <u>Youth Workforce System Career Exploration and Work Experience Coordinator</u>
Occupational Skills Training	Training in technical skills leading to industry credential for WorkSource Rogue Valley customers 18 and older. Funding is limited.

Centralized Services	Description
Career Exploration *	Project-based learning in four key industry sectors using common curriculum and courses. Organized by a <u>Youth Workforce System Career Exploration and Work Experience Coordinator</u>
Labor Market and Career Information	Information about in-demand industry sectors and occupations in the local area. Resources include Traitify, Careers Rogue website, and labor market workshops by WorkSource Rogue Valley
Career Bridge Training	Industry-specific training programs to help youth adults gain education, skills, and credentials needed to access entry-level employment in high-demand occupations. Trainings are delivered by <u>Youth Workforce System Career Bridge training providers</u> (brokered by RWP). Participants must be referred to training by their Career Coach.
Paid Work Experience *	Administered and coordinated by a <u>Youth Workforce System Career Exploration and Work Experience Coordinator</u> in coordination with local employers. Career Bridge training has built-in paid work experiences (internships). <u>Youth not in Career Bridge are eligible for work experience through the Youth Summer programs only.</u>
Social / Emotional Well-being & Personal Effectiveness	Training in mindfulness, one-on-one coaching, WINGS (brokered by RWP)

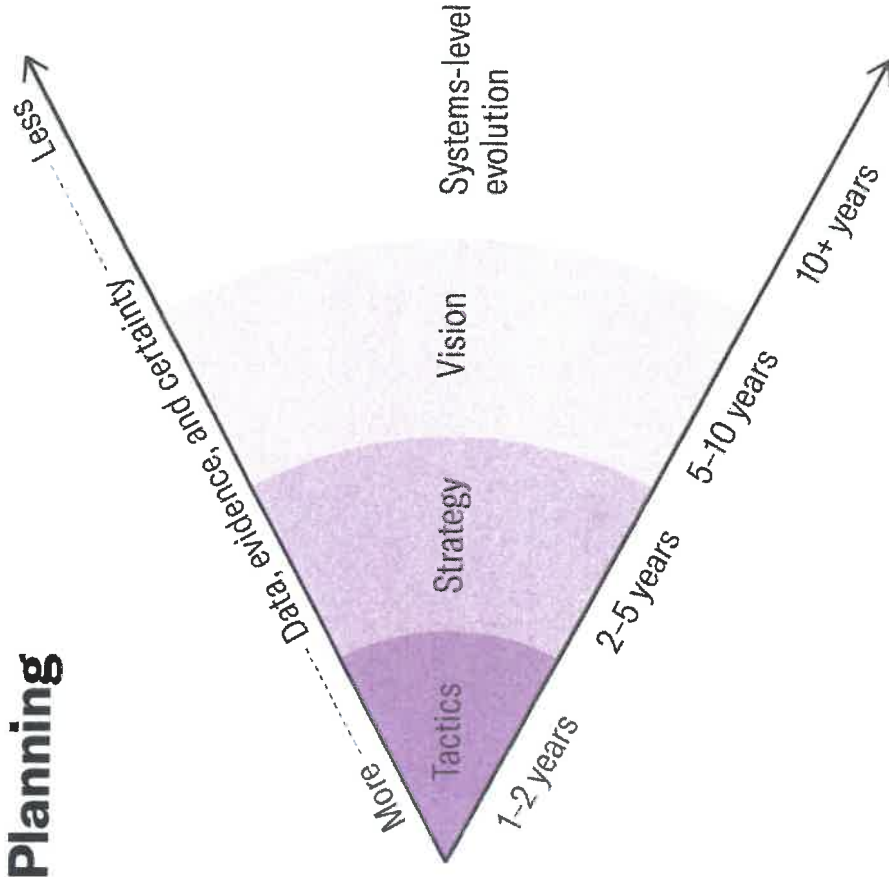
Existing Community Resources for Possible Career Bridge Trainings

Provider / Sponsor	Career Bridge Training	Length	Credential	Internship Component	Target ISY/OSY/Adult	Jackson / Josephine
71:Five	Automotive	12 weeks		Yes		Jackson
	Carpentry	12 weeks		Yes		Jackson
	Welding	12 weeks		Yes		Jackson
WSRV / DHS	Construction Trades	8 weeks		No	OSY/Adults	Both
RCC + Select Regional High Schools	Certified Production Technician (CPT)	11 weeks	CPT – 4 modules: Safety,	No	ISY/OSY/Adults	Both ?
WSRV - Youth / USFS	Forestry Crew			Yes	OSY	Both
WSRV - Youth / Table Rock Foundation (?)	Forestry Crew			Yes	OSY	Josephine - onsite housing provided
WSRV / DHS	Healthcare Cohort – Overview of: <ul style="list-style-type: none"> ▪ Medical Assistant ▪ CNA1 and CNA2 ▪ Caregiving ▪ Medical Office Specialist ▪ Patient Representative ▪ Phlebotomy ▪ Electronic Medical Records ▪ Dental Assistant ▪ EMT/Paramedic ▪ Medical Billing & Coding 	4 weeks	Food Handler’s Card, CPR	Yes	OSY/ Adults	Both
Medford SD	MPACT – Pre-Apprentice for Construction Related Trades -Construction Technology -Manufacturing / Engineering Technology				ISY	Jackson
Medford SD	Healthcare Pathway				ISY	Jackson
Grants Pass SD					ISY	Josephine
MakerSpace Talent						Jackson
MakerSpace Central Point						Jackson

Innovation Hub RCC						Josephine

A Futurist's Framework for Strategic Planning

Instead of arbitrarily assigning goals on a quarterly or yearly time line, use a cone instead. First identify highly probable events for which there's already data or evidence, then work outward. Each section of the cone is a strategic approach, and it encompasses the one before it until you reach major systems-level evolution at your company.



Source: Amy Webb, Future Today Institute

From: "How to Do Strategic Planning Like a Futurist," by Amy Webb, July 2019

VISION

A strong regional economy and prosperous community fueled by skilled workers, quality jobs and thriving businesses.



ROGUE WORKFORCE PARTNERSHIP

MISSION

Create a demand-driven system that aligns the skills of workers to the needs of employers while improving career pathway accessibility.

STRATEGIC OBJECTIVES

All targeted sectors have robust demand-driven action plans

Workforce skills training and throughput meet the demands of each industry sector

Communication and data reporting structure are implemented and are responsive to sector and workforce needs

Emerging, transitioning & current workers have access to the education, training and supports leading to employment and career pathways that reduce economic disparity gaps

KEY STRATEGIC RESULTS

<p>Advanced Manufacturing and Healthcare sector groups have updated Action Plan in place by November 1, 2019</p>	<p>K-12 system is aligned: baseline numbers of students completing targeted trainings are established and performance metrics are set by July 1, 2020</p>	<p>RWP staff develops a first phase communications plan toolkit to support RWP members and industry sector efforts by March 1, 2020</p>	<p>Engage and convene 3 or more key employers to determine interest in implementing "Workplace Stability" initiative by November 1, 2019.</p>
<p>Transportation / Logistics, Information Technology/E-Commerce & Construction are convened & Action Plans developed by July 1, 2020</p>	<p>Public Workforce system is aligned: baseline numbers of customers completing targeted trainings are established and performance metrics are set by July 1, 2020</p>		<p>Implement "Workplace Stability" initiative (if there's business interest) by July 1, 2020.</p>
<p>Each sector adopts a strategy & processes to continually identify its high-demand for skills training needs by February 1, 2020</p>	<p>Southern Oregon Higher Education Consortium is aligned: baseline numbers of students graduating to meet targeted industry demands are established and performance metrics are set by July 1, 2020</p>	<p>RWP staff convenes workforce and education system partners to build initial data analytic capacity and customer typologies by March 1, 2020</p>	<p>Create & offer innovative Personal Effectiveness Skills training experiences & coaching for targeted at-risk populations and evaluate their initial effectiveness by July 1, 2020</p>
<p>Each sector develops & implements a communication plan by April 1, 2020</p>	<p>PowerUp Academy is relaunched with a focus on meeting targeted sector workforce demand by July 1, 2020</p>		

RWP Workforce Board ♦ Membership & Positions

v. 2020.02.03

<i>Business Representatives ♦ Mandatory Majority</i>			<i>Labor Representatives &/or Joint Apprenticeship Training Center ♦ Mandatory</i>		
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</i> IBEW Local 659 - International Brotherhood of Electrical Workers	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
3	Nikki Jones* ♦ Owner	Express Employment Professionals	Susan Bruce – Labor Relations Representative	Oregon Nurses Association	3
			<i>Community-Based Organizations</i> - with demonstrated experience & expertise in addressing the employment needs of individuals with barriers to employment - <u>serve veterans, or individuals with disabilities</u>		
			<i>Organizations</i> - with demonstrated experience & expertise in addressing the employment, training, or education needs of <u>eligible youth</u> , including representatives of organizations that serve <u>out-of-school youth</u>		
4	Shawn Hogan * ♦ VP of Engineering	Linx Technologies, Inc.	Kirk Kolb ♦ Superintendent	Grants Pass School District	4
5	Brent Kell ♦ Executive Director	Valley Immediate Care	Bret Champion ♦ Superintendent	Medford School District	5
6	Norm Kester ♦ CEO	Quantum Innovation	Scott Beveridge ♦ Superintendent	Southern Oregon Education Service District	6
			<i>Education & Training – Title II & Higher Education ♦ Mandatory</i>		
7	Trever Yarrish ♦ Co-Founder & COO	Zeal	Dr. Cathy Kemper-Pelle ♦ President	Rogue Community College	7
			<i>Economic / Community Development ♦ Mandatory</i>		
8	Robert Begg ♦ Director HR Administration	ASANTE Health Systems	Alex Campbell ♦ Regional Coordinator	Regional Solutions Team	8
			<i>OED / Wagner-Peyser ♦ Mandatory</i>		
9	Alex Poythress ♦ Managing Partner	REVEIL Agency	Sherri Stratton ♦ Senior Manager	Oregon Employment Department	9
			<i>Vocational Rehabilitation ♦ Mandatory</i>		
10	Michael S. Card ♦ President	Combined Transport	Kari Kingsolver ♦ Area Manager	Office of Vocational Rehabilitation Division	10
			<i>Optional Members</i>		
11	Catherine Goslin ♦ Director of Human Resources – Potentially Vacant	Rogue Valley Manor	Kim Whitney ♦ Self-Sufficiency Program/District Manager	Oregon Department of Human Services	11
12	Joe Meyers ♦ Vice President Potentially Vacant	Pacific Electrical Contractors	Dr. Linda Schott ♦ President	Southern Oregon University	12
13	Vacant		Dr. Tom Keyser ♦ Dean for the College of Engineering, Technology & Management	Oregon Institute of Technology	13
14	Vacant				
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

RWP - Workforce Board Potential Candidates

From Sector Groups

- Marla Ipsen

SOREDI Board Members

- Aaron Ausland
- Steve Vincent
- Kristina Kruger

OBC Board members

- Bill Thorndike
- Sid DeBoer or Lithia Exec
- Joth Ricci or Dutch Bros Exec

Construction

- Russ Batzer – Batzer Construction
- John Purdy – S&B James
- Jason Stranberg - Adroit
- Reed Murphy
- Knife River?

Other

- Harry & David
- Brenda Johnson
- Hach Analytics leader

Rogue Valley WSRV Local Leadership Team - Work Sheet for Learning Community / Predictive Analytics

Issue / Focus Area:

- ▶ **Employment & Career Progression Success for Key Target Populations, or . . .**
- ▶ **Improve Employment, Skills Gain & Career Pathway & Wage Progression for low-income / low opportunity families, especially those that overlap with other at-risk target populations being served by K-12 education partners**

Objective: Increase the Incidence & Rate of Employment, Job Retention, Skills Gain, and Wage Gain/Career Progression for target populations by 10% to 35% in the next 18 to 24 months

Key target populations would initially be customers served by various public workforce system programs, including: TANF, SNAP, Unemployment Insurance, Title IB Adult, Dislocated Workers and Youth, Title II/Adult Basic Skills, and Title IV Vocational Rehabilitation.

Hypothesis / What's driving the current situation/problem?

We believe that:

- Different customers have varying skills they need to acquire/develop in order to experience greater employment and career success. The amended Skills Competencies Pyramid (see attachment A) is a helpful framework to organize the different levels of skills different individuals need to acquire/develop.
- Different customers have varying types and degrees of challenges, barriers or obstacles they may be striving to overcome in order to find long-term, sustainable employment and career success. Attachment B is a table that begins to provide a framework for organizing these challenges/barriers/obstacles in a continuum of increasing intensity and possible overlap. The greater number and more profound the depth of these challenges, the greater degree of difficulty any given individual might have in gaining and maintaining employment, let alone further career success. The more intensive the number and/or depth of these challenges, the more intensive the levels of hands-on-coaching, supports and interventions will be needed.

Theory of Change:

- Identify the different typologies of customer (e.g., leavers, cyclers, stayers) for each program population
- Identify their different interests, passions, goals, challenges, skill-building and barrier removal needs and then aggregate customers into typologies with distinct sets of current and newly innovative service/supports, including:
 - ▶ Wrap-around supports for partners from healthcare, behavioral health, housing, etc.
 - ▶ Personal effectiveness seminars, coaching and skill-building experiences as needed
 - ▶ Other innovative peer-to-peer supports, etc.

- Track and support their progress along a graduated self-sufficiency scale. Compare current service cohorts to previously served cohorts of similar typology and see what benchmarks we can identify and distinguish as mid-term improvements in the multi-month or year path to success.
- Adjust service delivery mix as needed, depending upon what we see working or not working for different customer typologies
- Other?

DHS-ORRI Predictive Analytics Support

- Is there a way they can help us refine and test our hypotheses?
- Would it make sense to start by doing data analysis that builds upon the algorithms already being validated by local K-12 school districts, to look at program enrollment patterns (stand alone and concurrent) in Corrections, DHS, OHA, K-20, Workforce Services and employment/labor market databases to identify more discreet typologies and predictive analytic success outcomes?
- Are there predictive analytic typologies that we can apply to help us in our targeting, intervention strategies and design of services?
- Can we identify and distinguish high hurdles (stayers & high-intensity cyclers) vs. middle distance runners (low-intensity cyclers) vs. sprinters/quick & slow leavers). And see if it makes sense (enough numbers and potential for success to demonstrate some easier, early wins) to target some specific populations to show efficacy of our efforts.
 - E.g. accelerate slow leavers and low-intensity cyclers from SNAP into good career pathway employment, retention and wage progression
 - E.g. accelerate slow leavers and low-intensity cyclers who are title II participants into good career pathway employment, retention and wage progression.
 - E.g., accelerate ex or soon to be exit foster youth with less intensive challenges/barrier to accelerate them into good career pathway employment, retention and wage progression
 - Then gradually start laying in more high-intensity / highly challenged customers to show the potential for even greater ROI and long-term public services cost savings?
- Can you analyze outcomes from youth service provider? How do they link to continuation of adult services?
- Can you analyze historical REACH Pilot Project participants and track outcomes over time.
- Other?

Key Results *(time specific & as measured by):*

- *To Be Developed by LLT & DHS-ORRI*

Action/Work Plan:

- *To Be Developed by LLT & DHS-ORRI*

Sector Strategies - Business Recruitment and Retention of Employees Work Sheet

Issue / Focus Area: Employment, Retention & Career Progression of Staff for the Target Sector Strategy Industries

Objectives:

- ▶ **Increase the throughput of appropriately skilled candidates from K-20 education/training and workforce system partners by 10% to 35% in the next 18 to 24 months**
- ▶ **Increase the job retention of employees hired by target companies**
- ▶ **Increase the on-going skill development, career progression and wage growth of targeted employees at target companies**

Key target industries include: Advanced Manufacturing, Healthcare, Transportation / Logistics, Information Technology / E-Commerce and Construction.

Hypothesis / What's driving the current situation/problem?

- Our economy is at full employment, with an all-time low unemployment rate.
- A myriad of other economic, labor market, demographic, community and other conditions are creating extreme challenges for all employers to fill and maintain their talent needs. Even with any future recession, we anticipate that gaps in skills and talent will still remain until the deeper structural “reengineering” of the education and workforce system that is underway in our region is completed.
- That certain employees in the region’s targeted sector industries are model employees, with good job retention rates (low turnover), and also (in the appropriate sector industries) ideal for progression into higher wage career paths within the company and/or industry.
- Different companies in our targeted sector industries with varying skill needs are striving in different ways to find ways to attract, recruit, employ, retain and skill-up employees.

Theory of Change:

- Industry sector partners are working together to create coordinate outreach, marketing and engagement strategies to recruit potential job/career-seekers to explore the opportunities in the region’s targeted sectors.
- By using “Big Data” analytic tools, we can identify the distinguishing characteristics and candidate typologies, so that we can more effectively target the best set of job/career-seeker candidates to recruit for the appropriate sector industries.

- Identify the different typologies of current and past job holders (e.g., leavers, cyclers, stayers) by industry and company for each sector industry.
- Identify their different interests, passions, goals, challenges, skill-building and barrier removal needs and then aggregate customers into typologies?
- Identify key outreach, engagement and other strategies to fill the talent pipeline for our region's targeted sector industries
- Link these above efforts with the related "supply-side" efforts underway with K-20 education and workforce partners to engage students and job/career-seekers in these developing "UpSkill & Backfill" career pathways.
- Track and support success in filling the talent pipeline
- Adjust strategies as needed, depending upon what we see working or not working for different customer typologies
- Other?

DHS-ORRI Predictive Analytics Support

- Is there a way they can help us refine and test our hypotheses?
- Can you access and analyze all the needed wage / labor market data from OED and associate with other databases (SLDS/K-20, workforce, DHS, OHA, Corrections, etc.) as well as other appropriate databases to paint the pictures of different companies past success and failures on recruitment, job placement, retention and wage progression success of individuals?
- Would it make sense to start by doing data analysis that builds upon the algorithms already being validated by local K-12 school districts, to look at program enrollment patterns (stand alone and concurrent) in Corrections, DHS, OHA, K-20, Workforce Services and employment/labor market databases to identify more discreet typologies and predictive analytic success outcomes associated with the success and failures of these target industries/companies?
- Are there predictive analytic typologies that we can apply to help us in our targeting, intervention strategies and design of services to employers and potential job/career-seeker candidates?
- Other?

Key Results *(time specific & as measured by):*

- *To Be Developed by LLT & DHS-ORRI*

Action/Work Plan:

- *To Be Developed by LLT & DHS-ORRI*

TANF Population Analysis

Executive Summary



Predictive Modelling

Can we identify characteristics of each subpopulation accurately enough to predict what subpopulation a TANF recipient may belong to?

Predictors

- Age at first episode (median = 28 yrs.)
- Gender (80% female)
- Employment status ¹
- Number of alcohol/drug treatment episodes (41% 1+ episodes across 2-year span)
- Number of mental health service episodes (58% 1+ episodes across 2-year span)
- Number of unique children on the case (median = 2)

Results²

All predictive models were compared with the Leaver category

- Women are 62% more likely to be a Stayer, and 18% more likely to be a Cyclor
- Each quarter with at least 1 new episode of alcohol/drug treatment increased likelihood of being a Stayer by 4% and of being a Cyclor by 21%.
- Each quarter with at least 1 new episode of mental health services increased likelihood of being a Stayer by 37% and of being a Cyclor by 26%.
- Each child on a case increased likelihood of being a stayer by 17% and of being a cyclor by 30%.
- Older individuals were very slightly (<1%) more likely to be a Stayer, and 4% less likely to be a Cyclor.

Discussion

While the TANF populations across the categories were remarkably similar, some key factors correlated with one category more than another. Those clients who received more mental health treatments over longer periods of time were much more likely to be Stayers than Leavers, and only somewhat more likely to be Cyclors than Leavers. This was reversed for those receiving alcohol/drug treatment, where those receiving more periods of treatment were much more likely to be a Cyclor, and only slightly more likely to be a Stayer compared to a Leaver. The difference in alcohol and drug services and mental health services between the Cyclors and Stayers suggests that these are two different groups that may respond to different support services.

¹ Starting in the quarter the TANF episode began, and for the next 7 quarters thereafter

² Predictive model accuracy was 75% for Stayers, and 65% for Cyclors compared to Leavers

TANF Population Analysis

Executive Summary



Subpopulations

Group	Definition	Percent of Population
Stayer	One episode which lasts for 2 years or more	5%
Leaver	One episode which lasts for less than 2 years	
Slow	Episode between 12 and 23 months	6%
Quick	Episode less than 12 months	46%
Cycler	More than 1 episode	
High-intensity	Total time on TANF 24 months or more	14%
Low-intensity	Total time on TANF less than 24 months	29%

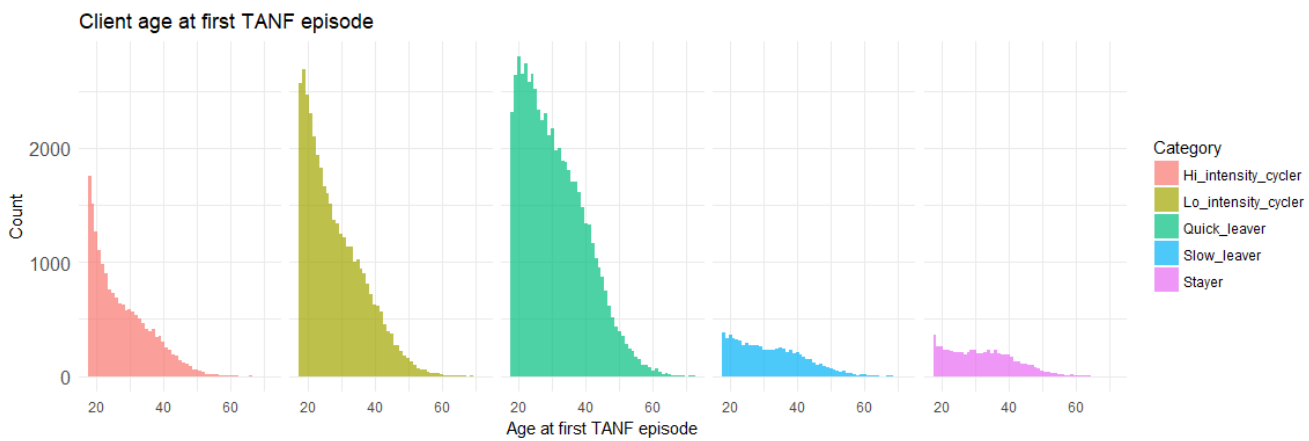


Figure 1: TANF clients enter the program at similar ages across all TANF categories.

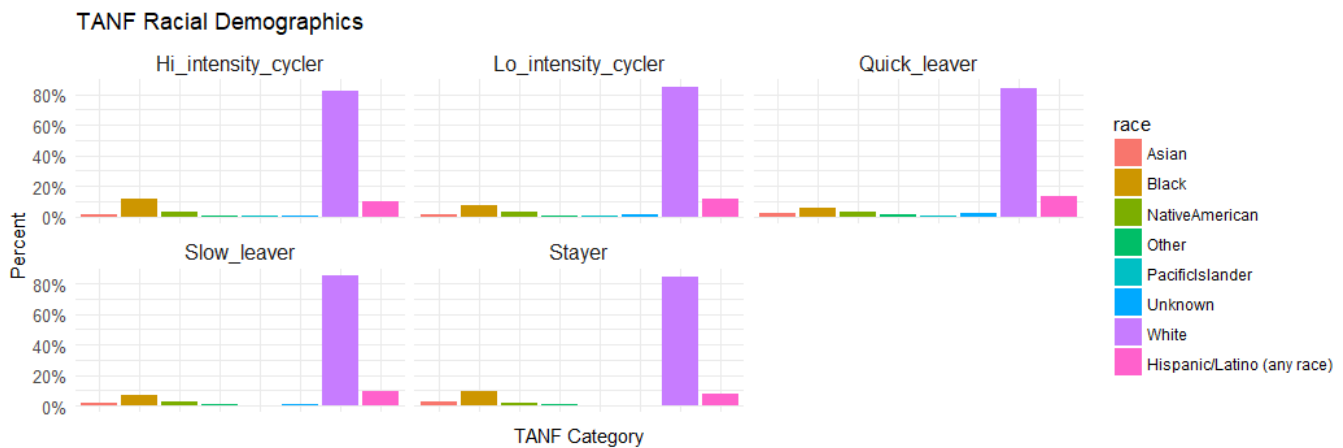


Figure 2: Racial and ethnic groups were slightly different across TANF categories.³

³ Kruskal-Wallis (race) $\chi^2 = 107.8, p < .05$, Kruskal-Wallis (ethnicity) $\chi^2 = 531.54, p < .05$

Key Questions	Quick Leavers	Slow Leavers	Low-Intensity Cyclers	High-Intensity Cyclers	Stayers
What's either affirming or surprising in the OEDA Oregon TANF data?				• Would expect & affirm high incidence a high correlation with substance abuse treatment.	• Would expect & affirm high incidence of MH treatment with Stayers.
What barriers and characteristics are you seeing for the different typologies of Leavers, Cyclers & Stayers?	<p>Barriers / Characteristics Common Across All Typologies <i>(Issues likely to be more intense & co-occurring the further along the typology continuum one moves from Leavers to Cyclers to Stayers)</i></p> <ul style="list-style-type: none"> • Housing – <i>The less access to affordable housing, the harder to get off TANF. Seeing people getting more resourceful in sharing housing. Housing assistance allows some to get off TANF, but there's long wait list, & then there's the <u>Benefits Cliff</u>. Plus don't forget about coming up with the deposit.</i> • Food Insecurity – <i>"When was your last meal?" and other similar questions recently asked through a Community Health survey shows that is most prevalent issue – a finding that was surprising to the healthcare practitioners conducting the survey. Also, access to affordable and nutritious food is an issue, as is the need for more education in nutrition, budgeting & meal planning.</i> • Child Care - <i><u>Benefits Cliff</u> is a huge issue</i> • Children & the Child's Needs – <i>Beyond child care issues: any trauma, health or other issues with child; no space for leave with employer. More intensive needs can result in greater intensity in cycling or staying.</i> • Criminal Background – <i>Depends on criminal record.</i> • Intergenerational Poverty - <i>Can be a larger & larger issue the further along the typology continuum you move, especially if there's co- occurrence with health, substance abuse, mental health, increasing challenges, domestic violence and similar barriers. Role models & cultural norms are critical in developing Employability Skills. Lack of this experience in one's family of origin generates a large gap in these needed life / job skills, which then requires intensive remediation through experiential learning, coaching and support.</i> • Adverse Childhood Experiences / Epigenetics & Childhood Trauma¹ - <i>Strongly associated with intergenerational poverty. Repeated exposures to adverse childhood experiences, or ACEs, remake the architecture of a child's developing brain, particularly in the prefrontal cortex, which is in charge of executive function and differentiating between good and bad, and the hippocampus, which handles memories and learning. Growing up in a poor home or neighborhood can give rise to toxic stress, which is a response to adverse experiences. Toxic stress can interact with other toxins like air pollution with consequences including cognitive deficits and emotional disorders, which in turn, help perpetuate disadvantage.²</i> • Foundational Skills³ – <i>Personal Effectiveness: Integrity, Professionalism, Initiative, Dependability & Reliability, Willingness to Learn, Emotional Intelligence</i> • Academic Competencies³ - <i>Reading, Writing, Mathematics, Science & Technology, Communication - Listening & Speaking, Critical & Analytic Thinking, Active Learning, Basic Computer Skills</i> • Workplace Competencies³ - <i>Teamwork, Adaptability/Flexibility, Customer Focus, Planning & Organizing, Creative Thinking, Problem Solving & Decision Making, Working with Tools & Technology, Workplace Computer Applications, Scheduling & Coordinating, Checking, Examining & Recording, Business Fundamentals</i> • Industry Related & Occupation-Related Skills³ <ul style="list-style-type: none"> • Training & Education - <i>Lack of training, education and the right Industry or Occupation-Related Skills that match labor market demands can severely limit a person's ability to become employed and progress along a solid career path.</i> • Work Experience - <i>Work Experience and On-the-Job Training is a primary mode in which individuals acquire Industry & Occupation-Related Skills. Lack of appropriate work experience can severely limit a person's ability to become employed or progress on a career path. A solid work history also demonstrates the</i> 				

¹ See: a) https://en.wikipedia.org/wiki/Adverse_Childhood_Experiences_Study; b) <https://www.sciencedirect.com/science/article/pii/S0190740916303449>; c) <https://www.aap.org/en-us/Documents/AAPCommunityPediatricsWade2016.pdf>; d) <http://psycnet.apa.org/buy/2016-01736-004>

² Excerpted from: <https://www.mailman.columbia.edu/public-health-now/news/unequal-stress-how-poverty-toxic-children%E2%80%99s-brains>

³ See: https://www.careeronestop.org/competencymodel/pyramid_definition.aspx

Key Questions	Quick Leavers	Slow Leavers	Low-Intensity Cyclers	High-Intensity Cyclers	Stayers
	<p><i>capability of a person to be a solid employee for an employer. Inconsistent or no work history tells an employer that they may be taking on high risk in brining on this job candidate.</i></p>				
<p>What services, interventions, supports, etc. do we see as key to TANF client's ability to achieve long-term self-sufficiency?</p>		<p>•Training / Education REACH / SOHOPE-HPOG This is a cohort learning training program that provides educational scholarships & support services. Requires capacity to follow-thru with application & program requirements.</p>	<p>•Training / Education REACH / SOHOPE-HPOG These Cyclers could fit this category – e.g., Child care was a prior issue, but now kids are school age, so parent now have capacity to get training.</p>	<p><u>Barriers More Common to These 2 Typologies</u> <i>(likely to be more intensive as you move along continuum from cycler to stayer)</i></p> <ul style="list-style-type: none"> • Health Issues – personal or family • Disabilities – personal or family • Safety – basic need – safety vs. risk – including deportation fear, domestic violence, Need a deeper dive on SSP family assessment. Also DHS is seeing more intensity in folks walking thru door – angry, frustrated, fear –a reflection of the increasing stress & tensions in our society overall. 	<ul style="list-style-type: none"> • Substance Abuse Cycling occurs with treatment too 7X = avg. Would expect less TANF use with more prolonged A&D treatment. • Mental Health EASA⁴ in OR is working on early ID & prevention to build greater capacity to avoid long-term poverty
		<p><u>Services & Supports Common Across All Typologies</u> <i>(Services & supports would be graduated & intensified the further along the continuum of typology you move from Leavers to Cyclers to Stayers)</i></p> <ul style="list-style-type: none"> ▸ Job / Life Coaches - <i>More of this capacity is needed. Employer feedback tells us that this support works to help in job retention, life/work problem-solving and the behavioral issues that arise. We all would benefit from a personal coach to help us all get thru life, especially with life's many traumas.</i> ▸ Wraparound Teams – <i>Cross-sector teams from social services, health / behavioral health / workforce & K-20 education, etc. Re-establish Direct Service Network Teams (DSNTs) as supports for children, youth & families in need of lower intensity levels of coordinated support within the comprehensive System of Care Wraparound Initiative⁵</i> ▸ Holistic, Family-Centered & Coordinated Prevention Work - <i>e.g. school/community-based, parent/child learning together cohorts – start training next generation of kids, with parents on life & employability skills to poverty rates/incidence over time. Incorporate lessons learned from REACH / SOHOPE.</i> ▸ Earn & Learn Training / New “Apprenticeship” Programs + Additional Support for Overcoming Benefits Cliff - <i>to put in place the missing stepping stones that can create a solid career path / lattice to true self-sufficiency.</i> <ul style="list-style-type: none"> • REACH / SOHOPE - Allows for post-TANF / SNAP / ERDC clients to access next tier training (e.g. CNA II, Medical Assistant, Surgery Tech, etc., but more policy alignment, training resources and support services are needed to bridge over the Benefits Cliff. • Earned Income Tax Credit for Caregivers - Would help employers fill these much needed, but very difficult to fill position, and allow workers to step into an entry-level position with the career pathway options we're building. 			
		<ul style="list-style-type: none"> ▸ Training / Education - REACH / SOHOPE This cohort learning model brings folks together to experientially “learn” things like: <ul style="list-style-type: none"> • What do you need in your backpack & how divide it up • How to interpret a syllabus 			

⁴ **Early Assessment and Support Alliance (EASA)** provides information and support to young adults, age 12 to 25, experiencing symptoms of psychosis for the first time. EASA teams include counselors, case managers, occupational and supported employment/education specialists, medical staff, and family education and mentorship. See: <https://www.oregon.gov/oha/HSD/AMH/Pages/EASA.aspx>

⁵ See: <https://www.oregon.gov/oha/HSD/AMH/Pages/Wraparound.aspx>

Key Questions	Quick Leavers	Slow Leavers	Low-Intensity Cyclers	High-Intensity Cyclers	Stayers
		<p>Clients are motivated to do something different, but may also be learning essential skills. The facilitator/coach works with this network of like-minded/like-experienced folks. The group learns not to be scared to look "dumb," and bond as a cohort learning together. They learn how to navigate processes & systems. Applies social thinking theory⁶ & recognizes that social learning theory⁷ might not apply to some individuals.</p>			
<p>What's our Theory of Change? What might be key recommendations regarding re-alignment of current investments, or new investments to be made to impact the success curve for any of the typologies of TANF clients?</p>	<ul style="list-style-type: none"> ▸ Addressing ACEs - <i>Regional partners are engaged in a Collective Impact⁸ initiative to address and prevent the impact of ACE's by building a Self-Healing Community⁹. Regional partners are engaged in a Collective Impact¹⁰ initiative to address and prevent the impact of ACE's by building a Self-Healing Community¹¹</i> ▸ Fostering Resilience - Set High Expectations Provide Unconditional Support (love) Provide High Accountability See: http://www.fosteringresilience.com/about.php & https://www.resiliency.com/free-articles-resources/the-foundations-of-the-resiliency-framework/ ▸ Circle of Courage¹² - <i>What Kind of Support System do you have – who's your tribe / village?</i> ▸ Ruby Payne - A Framework for Understanding Poverty https://www.ahaprocess.com/who-we-are/dr-ruby-payne/ & https://en.wikipedia.org/wiki/Ruby_K._Payne ▸ Foundational / Personal Effectiveness Skills – starting at as early an as possible, create experiential leaning experiences for parents & kids together & connection to real world life skills. 				
					<p>• Hypothesis- the earlier intervention for MH disabilities (i.e., EASA services for schizophrenia or other psychosis), the less likelihood of becoming a long term TANF Stayer. Similar to how more access to Early Learning Services, the less likely the need for IEP in K-12.</p>

⁶ See: <https://www.socialthinking.com/Articles?name=Introduction%20to%20Social%20Thinking>

⁷ See: https://en.wikipedia.org/wiki/Social_learning_theory

⁸ See: a) <http://www.southernoregonssuccess.org/>; b) https://ssir.org/articles/entry/collective_impact

⁹ See: <http://www.aceinterface.com/index.html>

¹⁰ See: a) <http://www.southernoregonssuccess.org/>; b) https://ssir.org/articles/entry/collective_impact

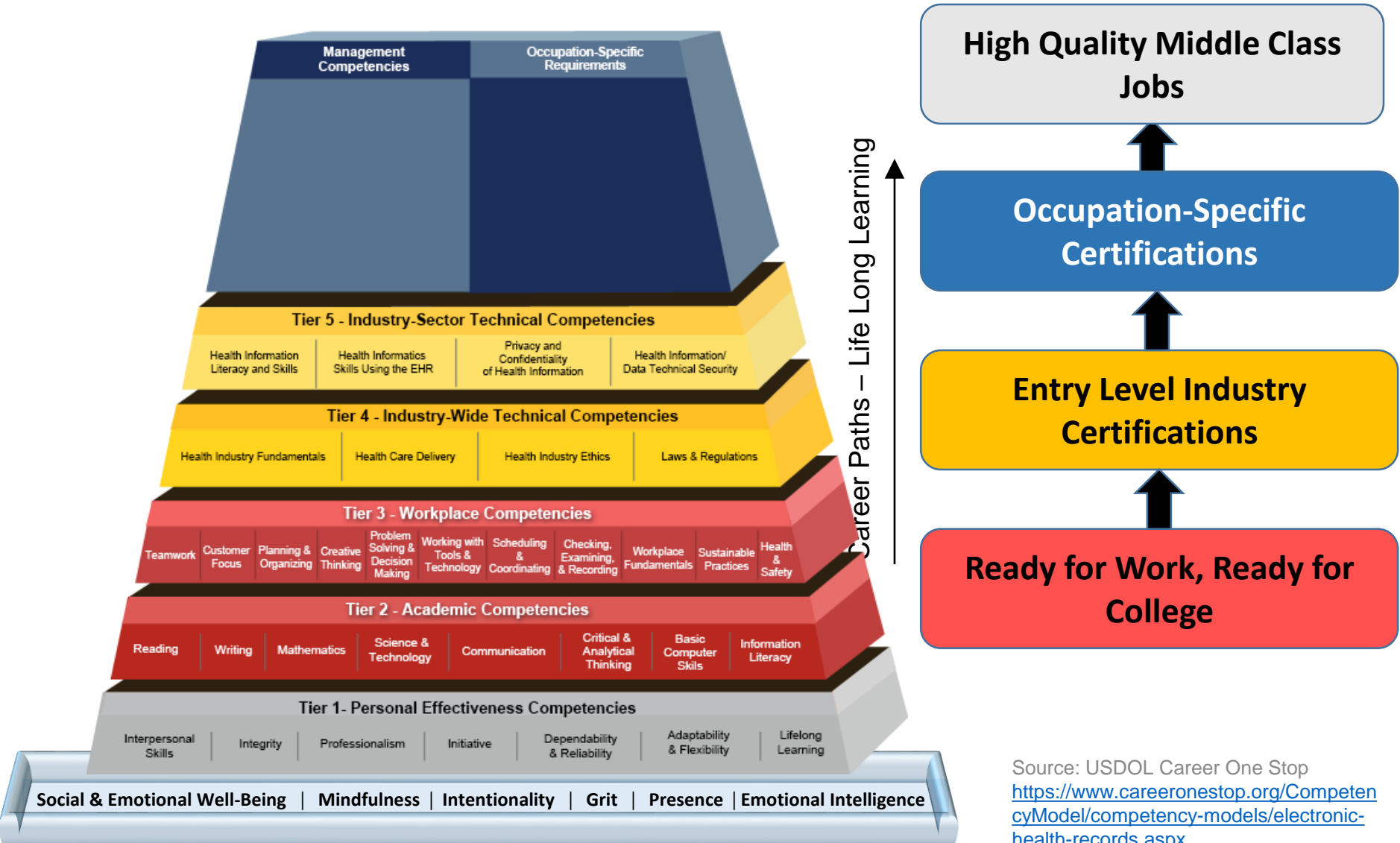
¹¹ See: <http://www.aceinterface.com/index.html>

¹² See: a) https://en.wikipedia.org/wiki/Circle_of_Courage; b) <https://reclaimingyouthatrisk.org/>

Rogue Valley Focus Group Participants:

Regional leaders from Southern Oregon Success & WorkSource Rogue Valley	Name	Title	Organization
were invited to participate on this Focus Group which met on July 23, 2018. The group generated responses to these questions in support of the work of the TANF Legislative Work Group, and as part of our on-going Collective Impact efforts to improve the lives of children, youth and families in the region.	Tami Allison	Senior Project Manager	Rogue Workforce Partnership
	Cynthia Anderson	Operations Supervisor / Youth Program	WorkSource Rogue Valley
	Amy Buehler, LCSW	Children's Services Program Manager	Jackson County Mental Health
	Peter Buckley	Program Manager	Southern Oregon Success
	Jim Fong	Executive Director	Rogue Workforce Partnership
	Rosemary Jernigan	Assistant Program Manager Self-Sufficiency	Oregon Department of Human Services
	Tabitha Northrup	Project Director	WorkSource Rogue Valley
	William North	CEO	Rogue Community Health
	Sherri Stratton	Area Manager	Oregon Employment Department

Healthcare Skills Pyramid



Source: USDOL Career One Stop
<https://www.careeronestop.org/CompetencyModel/competency-models/electronic-health-records.aspx>



February 6, 2020

Co-Chairs Elizabeth Steiner Hayward and Betsy Johnson and Dan Rayfield
Joint Committee on Ways and Means
H-170 Oregon Capitol
Salem, Oregon 97301

Dear Co-Chairs Johnson, Steiner Hayward and Rayfield:

We are writing to express the strong support of the Rogue Workforce Partnership and our many region-wide partners for the critical \$4.1 million budget request that will help bridge the skills gap faced by many at-risk youth and adult Oregonians in their efforts to find career prosperity. This item was omitted during the 2019 session.

In our region, we would provide short-term skills training, internships and on-the-job training for career-seekers pursuing opportunities in our targeted sector strategy industries of: Advanced Manufacturing, Healthcare, Information Technology/E-Commerce, Transportation/Logistics and Construction. These key industries have long term career paths and have been identified in partnership with our economic development partners as key drivers of our region’s economic vitality.

Training would be for both entry-level and next-step and/or pre-apprenticeship training for incumbent workers that lead to career growth. We would serve an additional 75 to 150 individuals, help businesses meet their workforce needs, bridge the opportunity disparity gap for many of the most vulnerable residents, and leverage a 1-1 match through federal funds, business support, and other resources.

Our broad array of cross-sector partners in this effort includes:

- Business & Industry
- K-12 School Districts - *all 11 districts*
- Higher Education – *RCC, SOU, OIT & private*
- Workforce Agencies – *all public, non-profit*
- Economic Development
- Labor
- Local Elected Officials
- Community-Based Organizations
- Coordinated Care Organizations
- Healthcare Providers
- Early Learning Hub Partners
- Housing

70% of Oregonians never start or finish college. This small investment will make a big difference in many lives, and help career-seekers enter into the broader array of “earn and learn” career pathways we’re building with the partners in our region.

The return on this \$4.1 million investment is estimated to be \$55.2 million, through additional tax revenues from employed Oregonians and less use of public assistance.

Sincerely,

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

Jim Fong
Executive Director
Rogue Workforce Partnership

cc: Southern Oregon Legislative Caucus

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

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

Robert Begg | Vice President of Human Resources
Asante Health Systems

Scott Beveridge | Superintendent
Southern Oregon Education Service District

Alex Campbell | Coordinator
Governor’s Regional Solutions Team

Michael Card | President
Combined Transportation

Bret Champion | Superintendent
Medford School District (appointment pending)

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

Catherine Goslin | Director Human Resources
Rogue Valley Manor

Shawn Hogan | Vice President Engineering
Linx Technologies

Nikki Jones | Owner
Express Employment Professionals

Brent Kell | Executive Director
Valley Immediate Care

Dr. Cathy Kemper-Pelle | President
Rogue Community College

Norm Kester | Chief Executive Officer
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

Melissa Wolff | Program Manager
Oregon Department of Human Services

Joe Myers | Vice President
Pacific Electrical Contractors

Alex Poythress | Managing Partner
REVEIL Agency

Dr. Linda Schott | President
Southern Oregon University

Sherri Stratton | Senior Manager
Oregon Employment Department

Drew Waits | Business Agent / Organizer
Plumbers & Steamfitters, UA 290

Trevar Yarrish | Chief Experience Officer /
Founding Partner
Zeal