



MINUTES

ROGUE WORKFORCE PARTNERSHIP WORKFORCE DEVELOPMENT BOARD

June 19, 2020

Zoom Conference Call

MEMBERS PRESENT

Scott Beveridge, Alex Campbell, Lance Corley, Michael Donnelly, Jessica Gomez, Shawn Hogan, Brent Kell, Norm Kester, Kari Kingsolver, Joe Myers, Alex Poythress, Sherri Stratton, Drew Waits, Kim Whitney, Trever Yarrish

All attendees (members and non-members) attended remotely

QUORUM PRESENT Yes

OTHERS ATTENDING

House District #3: Michelle Binker

Senate District #3: Senator Jeff Golden

Josephine County: Commissioner Darin Fowler

Oregon AFL-CIO: Jon Irvine

Business Oregon: Marta Tarantsey

Medford Fabrication: Bill Thorndike

City of Grants Pass: Susan Seereiter

AllCare: Sam Engle

Roe Motors: Steve Roe

HECC – Office of Workforce Investments: John Asher

Rogue Community College: Juliet Long, Kim Freeze

WorkSource Rogue Valley ResCare: Tabitha Northrop, Matt Sneed

Oregon Employment Department: Polly Farrimond, Guy Tauer

Youth Pathways Partnership: Joshua Shannon

College Dreams: Kurt Hildebrand

Southern Oregon Success: Peter Buckley

Rogue Workforce Partnership: Sherri Emitte, Ida Saito, Jill teVelde, Tami Allison, Greg Thweatt, Jim Fong

WELCOME & INTRODUCTIONS

The Board meeting was called to order by Chair, Jessica Gomez, at 9:05 a.m.

Roll was taken and documented for only Workforce Board members.

CONSENT AGENDA

The motion was made by Mike Donnelly to accept the RWP Workforce Board minutes from December 13, 2019, the RWP Workforce Board minutes from March 31, 2020, the RWP Budget / Actual Report dated 3/31/2020, and the WorkSource Oregon Operational Standards Annual report. Shawn Hogan seconded the motion. There was no discussion, no abstentions or opposed. The motion was approved unanimously.

RWP MEMBERSHIP RECONFIGURATION

State labor leaders have requested that we add another representative to the Workforce Board, which would also necessitate adding two more business positions. After deliberation at their most recent meeting, the RWP Corporate Directors recommended approval of the membership expansion from 25 to 27 members.

The question was asked regarding the total membership needing to be 28 since we are adding one new labor position and two new business positions. Jim clarified that due to the formula that is used, the total membership would be 27. It was also clarified that today's motion is only to increase the expansion of the board, and that the actual appointment of members is recommended by the RWP Corporate Directors to the Rogue Valley Workforce Consortium consisting of the two local elected officials, Commissioner Bob Strosser – Jackson County and Commissioner Darin Fowler – Josephine County.

Commissioner Fowler advocated for stronger representation of business leaders from Josephine County to join the Workforce Board. Commissioner Fowler suggested two potential board members: Grant Stutzman – Farmer's Building Supply / Illinois Valley Building Supply, and Cat Bonny of Web Mountain Arts.

The motion was made by Alex Campbell for the RWP Workforce Board to expand from 25 to 27 members, adding one new labor and 2 business positions. The motion was seconded by Mike Donnelly. No further discussion took place, no abstentions or opposed. The motion was approved unanimously.

Q & A ON WORKFORCE SYSTEMS QUARTERLY BRIEF

Based on a recommendation from Workforce Board member Norm Kester that we do more information sharing prior to the Workforce Board meeting, and carve out more time in meeting for critical decision-making and strategic alignment conversations, RWP staff created the first edition of the Workforce System Quarterly Brief/Newsletter. The publication was displayed onscreen and briefly highlighted. RWP members made the following comments:

- Mike Donnelly indicated that he was very proud of how RWP was able to distribute the Layoff Aversion funds. "It made a huge difference for those who might not have received a paycheck otherwise," Mike stated.
- Scott Beveridge congratulated RWP on the format and indicated that he thought it was a great communication tool.
- Alex Campbell said that Sherri Stratton, the region's Oregon Employment Department manager, and her staff have been very responsive to the public and inquiries he's made, even though the state-level Unemployment Insurance system has been overwhelmed and so many claimants are experiencing challenges in getting their claims processed.
- Jessica Gomez reiterated Alex's statement and gave a "big shout out" to local OED staff.
- Mike Donnelly likes the brief and thinks we should use it as marketing looking beyond the normal RWP group distribution.

Members of the Regional Economic Response Team (RERT) were invited to today's meeting and some have attended. The brief will be shared through this and other communication channels.

COVID-19: IMPACTS, RAMIFICATIONS, REOPENING & NEXT STEPS

Theory U

The Theory U diagram was displayed to help frame-up this COVID-19 conversation, depicting the stages of creating a learning community, including: “Co-Sensing” (how we make sense of all the changes going on around us), how we “Presence” ourselves, and then “Co-Create” and “Co-Evolve” our systems together.

Economic & Workforce Update

Guy Tauer, Regional Economist - Oregon Employment Department, walked the group through an “**Economic and Workforce Update**” PowerPoint. Three major topics were presented: Trends in Unemployment Claims, Economic Forecast, and the Census Survey tool. Polly Farrimond also provided a [link](#) to the May update from the Oregon Office of Economic Analysis.

Guy reported that he had trend information for only Jackson County; however, trends are very similar in Josephine County. Highlights from the presentation included:

- Pace of initial Unemployment Insurance (UI) claims has fallen dramatically, but still above pre-COVID levels;
- Oregon Employment Department (OED) is catching up on the backlog of UI claims – they have processed 98% of the older claims;
- UI numbers spiked from record lows in February to the highest rate we have seen since 1990; both counties are well over 15%, which has exceeded the great recession rates;
- Half of the UI claims seen so far are in restaurant, food prep, and service industries; but very few sectors are untouched;
- UI claims by age group are highest in the 25-34-year-old range, and for people with a high school diploma or less;
- Initial forecasts for employment recovery to pre-recession levels are estimated to be four years;
- There are many social and business safety net programs in place now, not present during the Great Depression, that are helping to soften the economic impacts;
- Retail and manufacturing are affected the most;
- Historically, even when Oregon recovers from recessions, manufacturing never reaches the pre-recession peak;
- [Census Small Business Pulse Survey](#): weekly data about business impacts from COVID-19. Data became available on this site beginning in mid-May, and will be updated weekly through June (or likely longer).

The Board entered into a discussion about the investments and policy alignments needed from local, state, and federal governments to adequately support the economy reopening. Board members feel this is an important time for workforce boards to weigh-in and feed information and policy needs to our elected officials.

Norm stated that we need to understand the correlation between locations (such as doctor’s offices, clinics, etc.) that are operating at only 50% capacity, and the correlation between that and the impact on manufacturing. Manufacturers for these industries are impacted, as well as the retail.

Conversation moved to the disincentive to work due to the additional \$600 per week in unemployment benefits. Members voiced that they feel there will be a dramatic difference seen after the \$600 incentive ends at the end of July. Guy noted that there are valid reasons why an employee could still be eligible for UI, even if they refuse to accept an offer of employment, such as having COVID-19, or caring for someone who does, or caring for children who are out of school. Employees don’t generally have the ability to refuse work, and it is up to the employer to let UI know if employees refuse to return to work.

RWP offered to convene a smaller group of members who would like to dive deeper into the economic and workforce data.

COVID-19, RWP's Strategic Roadmap and Our Path Forward

A PowerPoint presentation was displayed, and the Workforce Board members were asked to either indicate their questions/comments verbally or in the chat box on Zoom.

This part of the meeting was meant to create a space for dialogue, reality checks, and decisions on the strategic alignment and direction of the RWP and its partners. The following questions were posed:

- *If we now view RWP's Strategic Roadmap through a COVID-19 recession lens, are we still on track in our priorities, objectives, and key results, or do we need to make adjustments?*
- *Do our various strategies for training investments in the months ahead make sense to all the RWP members?*
- *Are there any measures / agreements we could put in place to help manage through the uncertainties regarding job demand, K-20 education, and workforce funding, and the impacts this might have in aligning skills training investments / capacities to a demand-driven system?*

Jim indicated that, in the presentation, he did not make specific note of any potential cuts in programs that may occur at in K-12 and higher education, similar to what has been done in prior episodes of extreme state budget constraints. A related key question would be: "How can we best coordinate with our K-20 education partners to ensure that capacities left in place are aligned with the region's sector industry needs, so that regional economic vitality can be revived and sustained?"

With Oregon Employment Department now assuming the service provider role for the Title IB program, there is an even greater opportunity to create a more seamless employment and training services. Public workforce system partners see the opportunity to more effectively blend and braid the historically siloed training funds (JOBS, SNAP, Title I, VRD, etc.) and "stack" these scholarship, on-the-job training and support service funds to create both short-term or longer-term "earn and learn" career pathway training packages. The cumulative spending limits could be set to whatever level deemed most appropriate by RWP-Workforce Board decision-makers, and could be as high as \$10,000 or more per person.

Response from Workforce Board members:

- Stacking of training funds is very exciting to see since we get to a comprehensive solution for an individual – we have to solve the whole person. There will always be a group of people who will continue to be on unemployment.
- Other board members indicated their agreement and "thumbs up" on the recommendations presented on the slide.
- Make sure we don't fund training where there are no jobs – be demand-driven.
- Our strategy is still valid; however, the tactics may need to be temporarily altered.
- We should not look at healthcare as a majorly impacted sector as the decrease in the medical field is only temporary. And, although he was not sure of what exact losses were, he ventures to guess that between Asante and Providence, they could have lost \$40 million in the month of May. Many people have been laid off and doctors are taking pay cuts.
- Transportation and Logistics and IT will recover quickly.
- Manufacturing will be questionable and will be driven by retail.
- The addition of the "Black Lives Matter" movement and trying to create a ladder out of multi-generational poverty are relevant and applicable, especially in the times we are in now.
- There is definitely a crisis in the childcare industry – school reopening is an unknown right now.
- Make sure single parents have childcare so they can return to work.

- We have to create capacity to support families so that they have options in figuring out what to do as a family if school does not open – have strong policy leadership regarding what we can do to put in a support structure to assist.
- Continue to advocate on our healthcare side, as well as childcare, for incentives/subsidies.
- Focus on early learning success and kindergarten readiness.
- Jobs that have been destroyed are largely in lower productivity sectors that are likely to come back slowly, which reinforces the strategy of upskilling which we are already pursuing.
- Childcare issues, as well as retail, etc. show up in inflation and point to the need to make sure that people are earning higher wages.
- Personal spending has dropped and, with the number of supply chain disruptions, there is the potential for a lot of restructuring in manufacturing.
- Position ourselves to take advantage of onshoring – position our supply chain so it's not as vulnerable.
 - Desire to create local and regional supply chain to meet the need of PPE supplies – opportunity to solve some of the manufacturing issues locally.
 - Structurally need to change the mindset of the buyer that cost is not the deciding factor in all purchases.
 - Message and help to guide people in the direction of thinking about where they want to spend their money – emergency or more regionalized supply chain?

Workforce Board members overwhelmingly endorsed the furtherance of the RWP Strategic Roadmap and the revised training investment strategy outlined, with the addition of whatever ongoing appropriate adjustments needed to respond to COVID-19 as reopening realities continue to unfold.

A “Track the Recovery” [link](#) was provided for reference.

The suggestion was made to form a small subgroup to discuss infrastructure around childcare and the contingency plan for our region.

RWP staff will convene a workgroup to write-up these discussions and flesh out details, and report back quarterly to the Workforce Board as we progress into the COVID-19 reopening phase.

Communications Infrastructure Update & Next Steps

Alex Poythress and Marta Tarantsey presented the Rogue Business website www.roguebusiness.org which was started by RWP and other regional business service partners – Business Oregon, SBDC's, SOREDI, WorkSource Rogue Valley -- in response to the pandemic. This website is focusing on the employer side as they are struggling to keep their doors open, access federal funding (like PPP and EIDL), figure out how to keep employees, get information on furloughs and layoffs, etc. The website is meant to be the most efficient way to take information from the source and put it into the hands of employers as quickly as possible. There are three components to this new communications infrastructure:

1. RogueBusiness.org website
2. [Rogue Business Connections LinkedIn](#) page – to provide platform for dialogue and collaboration
3. **CRM platform** (Customer Relationship Management) – to allow subscribers and email information out

Jim added that Alex and Brent Kell have been working previously on the RWP communications infrastructure build-out for the sectors. In responding to COVID-19, these prior RWP efforts were expanded to allow our other regional business service / economic development partners to join into a broader infrastructure build-out.

A next Phase II will focus on job/career-seekers and create similar communications infrastructure, building off the still-under-development **Rogue Careers** website.

A video that Alex and Marta developed about the website was shown to the Workforce Board. Posting parties are currently taking place, and final curation should be done early next week, with a soft launch possibly the last week of June. Members were encouraged to go to the website and LinkedIn page, subscribe, and input information.

ADJOURN

With no further discussion, the meeting was adjourned at 4:05 p.m.

Respectfully Submitted,

Tami Allison
Senior Project Manager
/tka

APPROVED:

Chair

Date

WORKFORCE SYSTEMS QUARTERLY NEWSLETTER

Wildland Fire

Workforce Response

Federal Disaster Recovery Workforce Funds Available

Rogue Workforce Partnership has been authorized to make disaster recovery workforce funds available to local partners, even as the state submits an application to the federal government for additional funds. Similar to COVID-19 Disaster Recovery funds allocated earlier this year, these can be used for the following:



- **Disaster Relief Employment**
Temporary employment for clean-up and recovery efforts and employment related to the delivery of humanitarian assistance in the immediate aftermath of disaster.
 - a) **Clean-up & recovery efforts** including demolition, repair, renovation and reconstruction of damaged and destroyed structures, facilities and lands located within the disaster area related to the disaster; or,
 - b) **Employment related to the delivery of appropriate humanitarian assistance** in the immediate aftermath of the disaster or emergency;
- **Employment / Training Services**
- **Supportive Services** – funds to enable individuals to participate in disaster relief employment.

RWP is coordinating with the county, cities and recovery organizations (Red Cross, United Way, La Clinica, etc.) to determine how best to allocate funds. With Business Oregon, RCC, SBDCs, SOU, SOREDI & WSRV, we're also reaching out to businesses to provide support.

Sector Strategies Updates

Wildland Firefighting / Forestry Sector Work Emerges



Wildland Firefighting, Forestry and Natural Resource Management organizations are critically important to our region. Southern Oregon ranks #1 in the state and #10 nationally for wildland fire hazard. Conversations at the Regional Economic Recovery Team earlier this year led RWP and SOREDI to meet with these sector industry leaders, who are critical first responders for our region. In investigating their needs, priorities, and interests, we found employers hungry for local talent to step into entry-level jobs with good career pathways.



There are opportunities to create stronger partnerships with school districts, non-profit youth providers and WorkSource Rogue Valley to create more career exploration experiences serving to expose both youth and adults to these opportunities. All partners are excited to pursue this work, and to include a forest restoration and other natural resource management career paths. In addition, SOREDI's Strategic Plan calls for exploring the creation of a "Center of Excellence" with this focus. At the September 30th meeting, Workforce Board members will be asked to consider approving the addition of this industry to it's list of priority targeted sectors.

Construction Industry Sector Launches

After a COVID-19 interruption, the region's construction industry lead-



ers will convene for the first time in the coming month, timed to coincide with October being Careers in Construction Month. RWP and WorkSource Rogue Valley will be staffing a construction industry virtual event in partnership with Associated General Contractors. Kelsy Ausland of Ausland Group and Russ Batzer of Batzer Construction will be co-chairing this broadly representative group. We're looking forward to great system alignment opportunities with these statewide partners.

SOREDI Manufacturing Summit

SOREDI will be hosting a virtual Manufacturing Summit on October 2nd from 8:00 AM to 11:30 AM coinciding with National Manufacturing Day. They will be working with OMEP to offer a manufacturing business simulation for strategic thinking entitled "Ready or Not." There will be several groups, each one running a business with real world situations. There is a winning team at the end of the simulation (with prizes!) and quite the learning experience for all attendees. There will not be a charge for manufacturers since RWP and others are helping to sponsor the event. To register, go to:

<https://soredi.org/event/mfgsummit2020ticket/>



Reinventing Healthcare & Other Sector Job Recruitment in the Age of COVID-19



Asante’s Director of Talent Management, Jennifer Susi, had a simple request during the early stages of the COVID-19 crisis. Could workforce partners recruit and compile a list of laid-off and job-seeking healthcare workers who could be contacted at 10:00 PM to cover a shift if COVID-19 created an immediate need? Asante, Valley Immediate Care, and other healthcare providers worked with RWP to create a short survey to ascertain specific occupational skills, and WorkSource Rogue Valley (WSRV) staff sent out an emails to with healthcare backgrounds who were collecting unemployment insurance and/or were in job-seeking mode. Over 50 responded and a new methodology for recruiting workers in the age of COVID-19 was born.

We will follow-up on this recruitment success by contacting these 50+ workers to see what other “Up-Skilling” and/or job search opportunities they might be interested in. In addition, RWP and WSRV will offer to use this same outreach process with our other industry sectors. These efforts will ramp up this fall, and align to an expected January job-seeking surge.

Labor Market & Economic Data



July	Medford	Grants Pass	Rogue Valley
Unemployment Rate	10.4%	10.6%	10.5%
Total Unemployed	10,602	3,559	14,191
Continued UI Claims	7,087	2,125	9,212

For more information go to <https://www.qualityinfo.org/rogue-valley>

RCC Opens New Health Professions Center

Rogue Community College will celebrate the grand opening of the **Health Professions Center** on their Table Rock Campus in White City on October 8th, at 5 pm.

The state of the art facility will provide a pathway for local students into high-paying career jobs while filling the need for healthcare workers in the Rogue Valley. In addition to housing the RCC **Nursing Program**, the following Health Occupational Programs will be offered:

- Basic Health Care
- Dental Assistant
- Medical Administrative Assistant
- Medical Assistant
- Medical Coding Specialist
- Pharmacy Technician
- Phlebotomist
- Sterile Processing Tech



All are vital to our Healthcare Sector. To view the Grand Opening via a live video stream, visit the following link: <https://web.roguecc.edu/about-rcc/health-professions-center-hpc-grand-opening>

New Caregivers & CNA Training Capacity

Partners are building new training capacity for **Caregivers** and **Certified Nurse Assistant (CNA)** at our region’s high schools, and for career-seekers at Rogue Community College and WorkSource Rogue Valley. Based on a successful **Caregivers School of Learning** pilot implemented by **Marla Ipsen of Woollard Ipsen Management** (*senior care facilities*), and the existing CNA training provided by **Pacific Healthcare Training, Medford School District** will integrate both trainings into their Healthcare Career Pathway this year.



For students at other school districts or not in the Healthcare Career Pathway, we’ll also be rolling out an **after-school Caregiver’s training**. Students will be paid stipends for the in-person lab portion of this training. The ultimate goal is to run these sessions regularly in both counties for all high school students. **Rogue Community College** and **WorkSource Rogue Valley** will also be partnering to offer Caregiver training to students in Adult Basic Skills, English Language Learners, and other job/career-seekers.

Successful completers will also be awarded a scholarship through an **Individual Training Account**, that they’ll be able to use anytime within a 5-year timeframe for next steps training. In the pilot Caregivers’ program, 37 successful completers were just recently offered ITA scholarships, and we’ve already received 4 applications. In addition, 4 completers went on to work in senior care facilities.



One-Stop Center Update



Career-Seekers Pursuing Training Still at Record Lows

Not surprisingly, with COVID-19 and now wildfires, the number of job/career-seekers pursuing training scholarship opportunities through WorkSource Rogue Valley have dramatically declined compared to a year ago - roughly 10% of totals in 2019, at around **10.6** per month. There has still been a steady flow of SNAP (Food Stamp) recipients referred from the Oregon Department of Human Services, and similarly small but steady stream of career-seekers coming through after contacting trade schools such as Pacific Healthcare Training (Certified Nurse Assistants) and the region’s independent truck driving schools. We anticipate these numbers will start to increase significantly in January 2021, after extended Unemployment Insurance ends, and the annual post New Year’s job-seekers surge.



Ramping-Up Communications & Recruitment

The new recruitment outreach method described on page 2, will be coupled with other communications capacity-building (*Rogue Careers & revamped WSRV website*) and outreach efforts (*social media, television, radio, etc.*) to get the word out about the great training, job and career pathway opportunities in our targeted industry sectors. We want to bring all these efforts to a crescendo in January to coincide with the end of extended Unemployment Insurance and the post New Year’s job-seekers surge.



Leading the State in Leveraging Training Resources

In spite of the current low number of career-seekers, WorkSource Rogue Valley is providing more SNAP Training & Employment Program training scholarships, through Oregon Employment Department leveraged funds, than any other region in Oregon. Our region is a statewide innovation leader in leveraging these federal training funds and propelling these customers onto careers.



Construction / Pre-Apprenticeship Training & NCRC Restart

Curtailed by COVID-19, the [WSRV Construction / Pre-Apprenticeship](#) program will restart this month. Designed for adults without construction experience, this free 8-week program lets career-seekers explore the trades in a supportive environment. In addition, National Career Readiness Certificate testing will restart in Medford this month too.



Title IB Adult & Dislocated Worker New Service Provider Contract Implementation

The transition of Title IB service provider from ResCare (*now renamed Equus Workforce Services*) to the Oregon Employment Department has gone very smoothly. We thank both Equus and OED for their outstanding professional efforts in ensuring a seamless customer experience. The new contract work is progressing extremely well. OED leadership has onboarded new staff (*3 from Equus*), and is training them while working closely with RWP to create the needed tools, standards and staff supports. OED resources are being leveraged to support the Title IB project including management time, business services staff, and cross-training with other staff to assist with follow-up and GED services. Managers have worked with Career Coaches to review caseloads and the new Title IB staff are working with customers to support trainings.

There are many exciting innovations being implemented. We’re reinventing training and employment services so they are seamlessly integrated, human-centered, and stackable. This “UpSkill, Earn & Learn” will allow job/career-seekers to obtain initial training, then an entry-level job, then additional training while they work so they can progress up a more robust career pathway.



Developing a Reopening Plan

Both of our region’s WorkSource Rogue Valley one-stop centers are currently closed to the public. The majority of staff at the centers are Oregon Employment Department employees and many are still being redeployed to process Unemployment Insurance (UI) claims. As the UI backlog decreases, regional partners are developing a reopening plan, with rigorous attention to ensuring the health and safety of customers and staff. The priority is to get back to helping job/career-seekers access training resources, upskill, and move onto career paths. Our hope is to have all plans and equipment in place to allow for this first-level of reopening starting sometime in October - providing 1-on-1 appointment to customers who can’t access services remotely.



College Dreams has changed their name to “**Project Youth+.**” As our region’s Title IB Youth Services Provider with a newly expanded scope of services, they’ve also been onboarding new staff and diving head-first into serving out-of-school opportunity youth aged 16 to 24. They are now setting their sights on outreach efforts to enroll more youth into training and employment services – especially those youth aging out of Foster Care. Currently serving 77 participants, 76 carried over from last year with one new enrollment.

Intersecting Our Investments In:

Personal Effectiveness Skills + Essential Employability Skills Rubric

Over the past year or more, RWP and the Oregon Department of Human Services have been investing in new innovative services to provide personal growth experiences for WorkSource Rogue Valley and TANF customers. Grounded in the principles of humanistic psychology and focused on building very tangible “Personal Effectiveness Skills,” these supports include regular 1-on-1, 30-minute coaching sessions, webinars, and seminars on a broad range of topics including: Mindfulness, Self-Care & Coping, Work-Life Success, and Well-Being. Service providers include [Evolutionary Consulting](#), [Inner Guide Expeditions](#), and [Wings Seminars](#).



Regional partners were recently asked to provide a presentation on this work at the State’s Workforce & Talent Development Board subcommittee. This presentation can be viewed at: [20200630 - Rogue Valley Presentation to WTDB Essential Employability Skills Task Force PowerPoint](#).

Trever Yarrish and the Zeal team are also working on a website allowing students, job/career-seekers, teachers, career coaches, and employers to track their progress on the Essential Employability Skills Rubric that was created by our region’s Business-Education Partnership. Beta testing is expected to start in the coming months.

Used throughout the Rogue Valley by school districts, Project Youth+, RCC, SOU, WorkSource Rogue Valley, employers, and other partners, the rubric is a tool that helps prepare youth and adults with the “soft skills” needed to succeed at work.

Tiffany Grimes of **Evolutionary Consulting** has also recently created a set of online webinars to support the development of these Essential Employability Skills. These will be incorporated into the employment and training scholarship programs available through WorkSource Rogue Valley.

A presentation on this innovative work will take place at the September 30th Workforce Board meeting.

“Coaching with Tiffany has been a very powerful experience in my life. (She) guided and supported me in creating action steps for positive progress in my life challenges.” M.S. (Grants Pass)

“(She) provided me several tools that I could continue to explore the issues and come to a place of acceptance, understanding, along with personal development.” H.L. (Rogue River)



Reimagining Higher Education

Catalyzed and convened by Representative Pam Marsh, executive leaders from RCC, SOU, Grants Pass School District, Medford School District, and Rogue Workforce Partnership met for a retreat sessions in August.



COVID-19 has exacerbated post-secondary education challenges in the Rogue Valley, in addition to long term resource shortages, renewed dependence on on-line education, and a local economy full of potholes. At the same time, we know a robust and effective post-secondary education system is integral when creating and maintaining a workforce that will sustain a more robust Southern Oregon economy.

The group meets again on September 28th for another half-day session to firm up core elements in an emerging plan. Leadership from SOESD will also be added to more fully represent the region’s K-12 school districts. Key emerging elements:

- Establishing an integrated student-centered system of education
- Systems integration through data sharing and direct admissions
- Dual-credit usage; longitudinal data analysis
- STEM / STEAM
- Simplified and aligned recruitment strategies
- Competency-based education
- Micro-credentialing.

We’ll devote time at the September 30th Workforce Board meeting to delve more into this emerging systems alignment effort.

Rogue Workforce Partnership Members Update



Welcome Susan Bruce as RWP Workforce Board's Newest Member

Susan has served as the Oregon Nurses Association Labor Representative in Southern Oregon for nearly a decade. She has worked in a variety of occupations, including restaurants, grocery stores, plywood mills, ridge cap mills, clerical work for the State of Alaska and at the Oregon State Penitentiary, personal care at memory care centers, assisted living facilities, and nursing care at Providence Medford Medical Center.

Susan's interest in participating on the Workforce Board is driven by a desire to help identify and improve opportunities for local residents to obtain the training they need in order to provide a reasonable standard of living for themselves and their families. She appreciates the ability to participate with the group and looks forward to continued work with everyone.

Recruiting New Industry Leaders

RWP Chair Jessica Gomez and Josephine County Commissioner Darin Fowler are leading the effort to fill 3 to 4 vacant business slots on the Workforce Board. Candidates must meet criteria set by federal law and recommendations are welcome.

Remembering Ron Fox

We were saddened to hear that Ron Fox just recently passed away. Ron was the SOREDI Executive Director for 10 years, and he served on the RWP Workforce Board and Corporate Directors from 2006 to 2016. Ron was a visionary strategist and systems thinker. He was a critical player in the implementation of all our systems transformation and sector strategies work, helped us forge strong strategic links with the leading statewide economic development and business associations, and played a pivotal role in the higher education alignment by serving on the RCC Board of Education since his retirement from SOREDI. He was a dear friend and amazing colleague, and will be greatly missed.

Broadband Access, Child Care Capacity & Working Parents Support

The Regional Economic Recovery Team is a group of community leaders convened by Alex Campbell (Regional Solutions / Governor's Office) and Marta Tarantsey (Business Oregon) to provide a forum for identifying, coordinating, and addressing COVID-19 related issues. Recent focus areas have included:

- ◆ Broadband Access in Rural Areas
- ◆ Reduced Child Care Capacity and its impact on reopening
- ◆ Support for Working Parents who are struggling to do their jobs, do child care, and help instruct their children who are learning from home.

All these issues have significant impacts on the workforce, so RWP staff have been partnering in follow-up efforts to generate short and long-term solutions to address these issues. RWP members or other partners who are interested in joining in these efforts should contact Alex Campbell or Jim Fong.

PPP Grant

Rogue Workforce Partnership has received a **Payment Protection Program (PPP) loan in the amount of \$127,218**. We anticipate large numbers of unemployed workers seeking help looking for jobs in the coming months, so boosting resources with a forgivable PPP loan seemed like a prudent decision that was made by the RWP - Corporate Directors in July.



About Us

The [Rogue Workforce Partnership](https://rogueworkforce.org/) is a business-led coalition that works to strengthen the economy of the Rogue Valley by addressing the region's workforce issues. We are:

- Executive leaders from business, education, workforce, labor and community-based organizations
- A private / public partnership led by a 51% majority of business leaders
- A non-profit organization authorized by federal and state law as the Local Workforce Development Board for Jackson & Josephine Counties

Our mission is to create a demand-driven system that aligns the skills of workers to the needs of employers while improving career pathway accessibility. Our work focuses on Sector Strategies, Education & Workforce Systems Alignment to meet targeted industry demands, and making Career Pathways accessible to all (<https://rogueworkforce.org/>).



ROGUE WORKFORCE PARTNERSHIP

Growing Skills - Building Careers - Boosting the Economy

DATE: September 23, 2020

TO: Rogue Workforce Partnership Workforce Board

FROM: Sherri Emitte, Chief Finance and Administrative Officer

SUBJECT: Budget for YE 6/30/21 (Program Year 2020)

On July 24, 2020, the Corporate Board reviewed and approved the RWP budget for the year ending June 30, 2021. Attached are the detailed brief presented at that July meeting with the budget, the budget document, and a budget infographic.

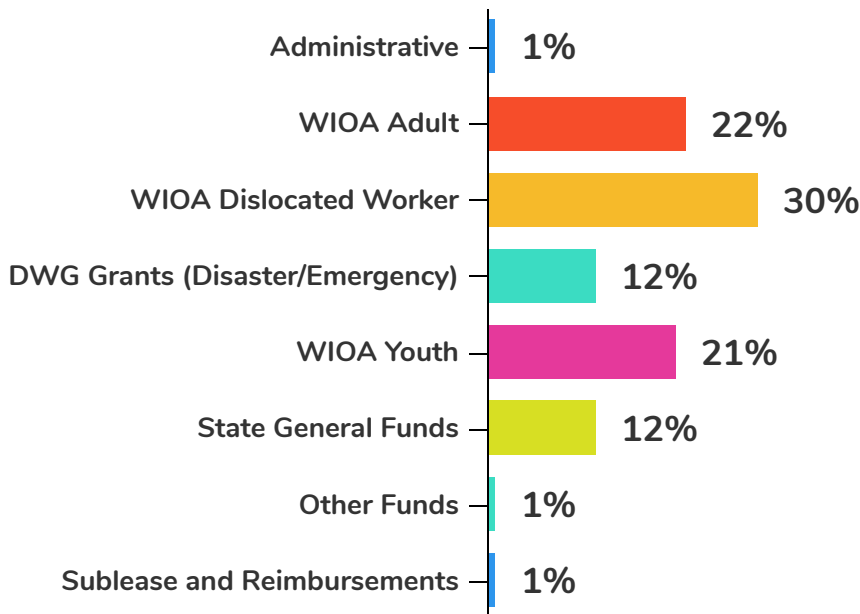
The Corporate Board is recommending that the Workforce Board approve the budget. Staff will be available at the board meeting to answer any questions you may have.


RWP BUDGET PY20

At A Glance

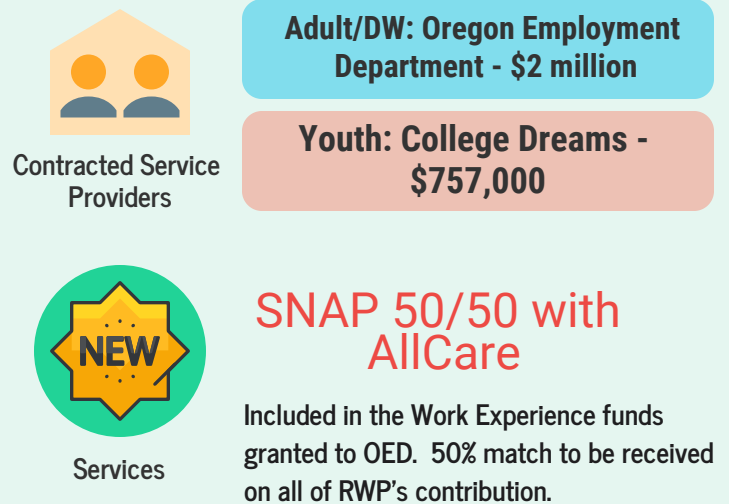
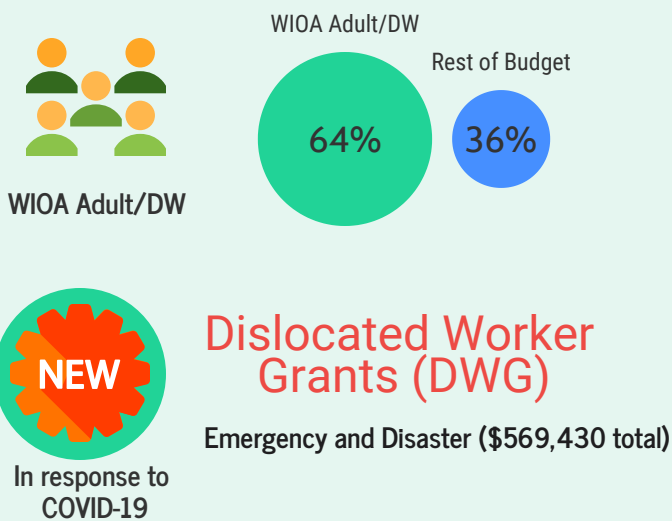
Rogue Workforce Partnership Budget for Year Ending 6/30/21 (Program Year 2020)

Fund Groupings % of Total Budget



 **Total Budget - \$4,756,714**

Highlights of PY20 Budget



**ROGUE WORKFORCE PARTNERSHIP
BUDGET FOR THE YEAR ENDING 6/30/21**

		ADMIN	WIOA ADULT AND DISLOCATED WORKERS				WIOA YOUTH		STATE GENERAL FUNDS			OTHER FUNDS				SUBLEASE & REIMBURSEMENTS			
REVENUES		TOTAL	ADMIN	WIOA ADULT	WIOA DLW	DWG Disaster	DWG Emplmnt	WIOA YOUTH	HIGH CONC OF YOUTH	COMPET STRAT	WORK EXPER	INDUSTRY ENGAGE	USFS	REVOLVING TUITION	ENDOWM FUND	CAREERS IN GEAR	OED CENTRAL	GOV TEAM	SOVA
1	Rollover funds	1,416,172	100,000	425,000	250,000			30,000	9,975	108,380	370,000	97,985	10,367	14,465					
2	New grant funds	3,281,736	270,234	864,383	684,430	284,715	284,715	883,283	9,975										
3	Transfer from Admin to Programs	0	(325,000)	90,000	160,000			75,000											
4	Transfer from Adult to DLW	0		(350,000)	350,000														
5	Interest/Dividend income	7,000													7,000				
6	Gain/Loss	1,000													1,000				
7	Endowment Fund contribution	1,973																	1,973
8	Booth fees	12,360																	12,360
9	Parking and copies reimbursement	2,024	26	125	195			160				30						26	1,463
10	Sublease income	34,449															5,819	28,630	
11	TOTAL REVENUES	4,756,714	45,260	1,029,508	1,444,625	284,715	284,715	988,443	19,950	108,380	370,000	98,015	10,367	14,465	8,000	14,333	5,819	28,656	1,463
EXPENDITURES		TOTAL	ADMIN	WIOA ADULT	WIOA DLW	DWG Disaster	DWG Emplmnt	WIOA I/S YOUTH	HIGH CONC OF YOUTH	COMPET STRAT	WORK EXPER	INDUSTRY ENGAGE	USFS	REVOLVING TUITION	ENDOWM FUND	CAREERS IN GEAR	OED CENTRAL	GOV TEAM	SOVA
Direct Program																			
12	Contracted Service Providers	2,757,000		550,000	850,000	200,000	200,000	647,000	10,000	0	280,000	0	8,000	0	0	12,000	0	0	0
13	Other direct expenditures	174,506		25,985	30,762	3,994	3,994	25,529	0	0	61,096	7,200	0	13,596	2,000	350	0	0	0
14	Total Direct Program	2,931,506		575,985	880,762	203,994	203,994	672,529	10,000	0	341,096	7,200	8,000	13,596	2,000	12,350	0	0	0
Sectors and Systems																			
15	Personnel	512,564		117,116	183,182	0	0	150,149	0	41,309	5,956	13,730	0	0	0	1,122	0	0	0
16	Other expenditures	116,738		596	945	0	0	828	0	55,326	0	59,044	0	0	0	0	0	0	0
17	Facilities and overhead	162,659		27,858	53,971	0	0	28,941	0	5,235	720	12,154	0	0	0	0	5,470	26,934	1,375
18	Total Sectors and Systems	791,961		145,570	238,097	0	0	179,918	0	101,870	6,677	84,927	0	0	0	1,122	5,470	26,934	1,375
Administration and Overhead																			
19	Personnel	175,392	175,392																
20	Insurance, audit and tax return	42,537	42,537																
21	Facilities and overhead	20,043	20,043																
22	Subtotal Admin and Overhead	237,972	237,972																
23	Less Admin reallocation	0	(237,972)	46,116	71,508	13,038	13,038	54,481	639	6,511	22,227	5,888	511	869	128	861	350	1,721	88
24	Total Admin and Overhead	237,972	0	46,116	71,508	13,038	13,038	54,481	639	6,511	22,227	5,888	511	869	128	861	350	1,721	88
25	TOTAL EXPENDITURES	3,961,439	0	767,671	1,190,367	217,032	217,032	906,928	10,639	108,380	370,000	98,015	8,511	14,465	2,128	14,333	5,819	28,656	1,463
26	Rollout funds	795,275	45,260	261,837	254,258	67,683	67,683	81,515	9,311	0	0	0	1,856	0	5,872	0	0	0	0
27	TOTAL EXPENDITURES & ROLLOUT	4,756,714	45,260	1,029,508	1,444,625	284,715	284,715	988,443	19,950	108,380	370,000	98,015	10,367	14,465	8,000	14,333	5,819	28,656	1,463
		0	0	0	0	0	0	(0)	(0)	(0)	0	(0)	(0)	0	0	(0)	(0)	0	0

Wildland Firefighting and Forestry

DRAFT2

SERVICE

Do you want to help the planet and your community while protecting our natural resources?



ADVENTURE

Do you desire to be part of a great team and test your limits?

MONEY

Do you want to earn a great entry-level wage?



TRAVEL

Do you want to travel to some of the most spectacular places on the planet?

Possible Career Pathways

Summer and Full Time opportunities (full time includes training, medical benefits, sick and vacation paid leave) - wages represent the region, contact each agency for specific wage ranges.

Now

3 years

7 years

Wildland Fire Fighting (1) & (2)

(1) No experience necessary ... get initial training within two weeks

Engine Boss, Sawyer, EMT, Forrester Officer (2)

(2) Federal contract fire jobs increase pay \$4.54/hour

Wildland Fire Dispatcher

Forestry/Restoration Technician

\$12 - \$14

\$15 - \$22

\$13.50 - \$22

\$16 - \$24

\$20 - 32

\$14.26 - \$16

\$16 - \$17

\$17 - \$22.53

\$

\$

\$



<https://www.graybackforestry.com/employment-application>
phone:



<https://lomakatsi.org/jobs/>
phone:



<https://www.oregon.gov/jobs>
phone:



<https://www.fs.usda.gov/working-with-us/jobs>
phone:



<https://www.blm.gov/careers>
phone:

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>		



Strategic Roadmap Progress Report
September 2020

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

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

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 structures 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

<p>Advanced Manufacturing and Healthcare sector groups have updated Action Plan in place by November 1, 2019</p>	<p>100% Completed</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>5% Completed, COVID interrupted</p> <ul style="list-style-type: none"> Initial partner conversations have occurred Next steps are being implemented in the current 	<p>RWP staff develops a first phase communications plan toolkit to support RWP members and industry sector efforts by March 1, 2020</p>	<p>33% Completed</p> <ul style="list-style-type: none"> Partnered with Bus Oregon, RCC, SBDCs, SOU, SOREDI, & WSRV to create business communication infrastructure – Rogue Business Website, LinkedIn page, CRM Developed protocol to push content / messaging Similar Rogue Careers infrastructure in development 	<p>Engage and convene 3 or more key employers to determine interest in implementing “Workplace Stability” initiative by November 1, 2019. Implement “Workplace Stability” initiative (if there’s business interest) by July 1, 2020.</p>	<p>20% Completed</p> <ul style="list-style-type: none"> Engaged in conversations with Asante, RCC, and LaClinica Convening / planning was delayed by the onset of COVID Will set new timeline after consultation with Robert Begg and Cathy Kemper-Pelle
<p>Transportation / Logistics, Information Technology/ECommerce & Construction are convened & Action Plans developed by July 1, 2020</p>	<p>33% Completed</p> <ul style="list-style-type: none"> Transportation/Logistics done Construction launch underway IT/E-Commerce relaunching Forestry/Wildland Firefighting - seeking to add, launch underway 	<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>51% Completed</p> <ul style="list-style-type: none"> Local Leadership Team meets regularly to address referral protocols, enhanced technology referral; design optimal customer experience Description of funds & stackable investments & protocols are created. One Stop Operator funds used to support leaders & staff development 	<p>RWP staff convenes workforce and education system partners to build initial data analytic capacity and customer typologies by March 1, 2020</p>	<p>25-30% Completed</p> <ul style="list-style-type: none"> Algorithm for predicting high school graduation starting in 3rd grade has been run & validated for GP and MFR school districts Next steps – add DHS, OHA, workforce data and create typologies needed for predictive analysis 	<p>Create & offer innovative Personal Effectiveness Skills training experiences & coaching for I targeted at-risk populations and evaluate their initial effectiveness by July 1, 2020</p>	<p>90% Completed</p> <ul style="list-style-type: none"> Mindfulness training & individual coaching implemented by Tiffany Grime/Evolutionary Consultation. Work is has evolved to include a newly enveloped "Launch Series" to coincide with Essential Employability Skills Rubric Work/Life 2-day seminar implemented by Wings & attended by staff, community members & participants. Future work is impacted by COVID and is being redesigned to
<p>Each sector adopts a strategy & processes to continually identify its high-demand for skills training needs by February 1, 2020</p>	<p>33% Completed</p> <ul style="list-style-type: none"> Progress made in Manufacturing , Healthcare & Transportation/ Logistics 	<p>Southern Oregon Higher Education Consortium is aligned: baseline numbers of students graduating to meet targeted industry demands are established and performance metrics</p>	<p>3% Completed</p> <ul style="list-style-type: none"> In partnership with RCC, SOU, GPSD, MSD & SOESD school districts and Rep. Marsh – alignment conversation commenced in August 	<p>RWP staff convenes workforce and education system partners to build initial data analytic capacity and customer typologies by March 1, 2020</p>	<p>25-30% Completed</p> <ul style="list-style-type: none"> Algorithm for predicting high school graduation starting in 3rd grade has been run & validated for GP and MFR school districts Next steps – add DHS, OHA, workforce data and create typologies needed for predictive analysis 	<p>Create & offer innovative Personal Effectiveness Skills training experiences & coaching for I targeted at-risk populations and evaluate their initial effectiveness by July 1, 2020</p>	<p>90% Completed</p> <ul style="list-style-type: none"> Mindfulness training & individual coaching implemented by Tiffany Grime/Evolutionary Consultation. Work is has evolved to include a newly enveloped "Launch Series" to coincide with Essential Employability Skills Rubric Work/Life 2-day seminar implemented by Wings & attended by staff, community members & participants. Future work is impacted by COVID and is being redesigned to
<p>Each sector develops & implements a communication plan by April 1, 2020</p>	<p>10% Completed</p> <ul style="list-style-type: none"> Diverted to a COVID-19 plan - Refer to column 3 	<p>PowerUp Academy is relaunched with a focus on meeting targeted sector workforce demand by July 1, 2020</p>	<p>3% Completed</p> <ul style="list-style-type: none"> Training offered by Tiffany Grimes through SOU and by John Underwood through SHRM 	<p>RWP staff convenes workforce and education system partners to build initial data analytic capacity and customer typologies by March 1, 2020</p>	<p>25-30% Completed</p> <ul style="list-style-type: none"> Algorithm for predicting high school graduation starting in 3rd grade has been run & validated for GP and MFR school districts Next steps – add DHS, OHA, workforce data and create typologies needed for predictive analysis 	<p>Create & offer innovative Personal Effectiveness Skills training experiences & coaching for I targeted at-risk populations and evaluate their initial effectiveness by July 1, 2020</p>	<p>90% Completed</p> <ul style="list-style-type: none"> Mindfulness training & individual coaching implemented by Tiffany Grime/Evolutionary Consultation. Work is has evolved to include a newly enveloped "Launch Series" to coincide with Essential Employability Skills Rubric Work/Life 2-day seminar implemented by Wings & attended by staff, community members & participants. Future work is impacted by COVID and is being redesigned to

SYNOPSIS

#1 NEW YORK TIMES BESTSELLER

Measure



What
Matters

3.8701 in

2.4512 in

How Google, Bono, and the Gates
Foundation Rock the World with **OKRs**

John Doerr

WITH A FOREWORD BY **LARRY PAGE**

How can your business make the tough choices that will ensure its survival? How do you keep your teams on track while encouraging employees to be fully engaged, even in times of stress and challenge?

The Objectives and Key Results system, pioneered at Intel and perfected at Google, gives an organization timely and highly relevant data to track their progress.

OKRs surface any organization's most important work, focusing effort, fostering communication, and building employee performance and retention.

TOP 20 INSIGHTS

1. Google co-founder Larry Page calls Objectives and Key Results “a simple process that helps drive organizations forward,” and says that “OKRs have helped lead us to 10x growth, many times over.”
2. An Objective is WHAT is to be achieved: something significant and action oriented, the stuff of inspiration and far horizons. Key Results benchmark and monitor HOW to get to the said Objective: they are specific, time-bound, and metric-driven; measurable and verifiable. Once these Key Results are all accomplished, the objective is achieved.
3. A two-year study by Deloitte found that the biggest impact on employee engagement comes from “clearly defined goals that are written down and shared freely.” Most effective is when those goals are linked to the team's broader mission.
4. Peter Drucker, the Father of Modern Management, coined the term “Management by Objectives (MBOs)” in 1954 . While productivity rose markedly at companies where MBOs were embraced, MBOs also have limitations: centrally-planned goals can become stagnant and slow to trickle down through the hierarchy. The OKR system builds on Drucker's work to create meaningful connections across the organization.
5. When Intel was facing an existential threat to its microprocessor business from Motorola, it used the OKR system to reboot the company's priorities in just four weeks. Dubbed Operation Crush, Intel's battle plan to “crush” Motorola was clear, precise, and fast, allowing a near-billion-dollar company to turn on a dime.
6. The OKRs system is built on four superpowers: 1) Focus and commit to priorities, 2) Align and connect for teamwork, 3) Track for accountability, and 4) Stretch for amazing results.
7. Focusing on the handful of initiatives that can make a real difference and deferring the less important ones allows leaders to commit to those choices and makes for a successful organization. High-performance organizations focus on the work that is important and are just as clear on what doesn't matter.
8. Flawed goal-setting can lead to disastrous consequences: Wells Fargo's ruthless one-dimensional focus on sales targets led to branch managers feeling pressured to open millions of fraudulent accounts. The subsequent consumer banking scandal may have damaged the Wells Fargo brand beyond repair.
9. Jini Kim, CEO of healthcare data platform and analytics company Nuna, emphasizes the importance of senior executives embodying the OKR system: “Until your executives are fully on board, you can't expect contributors to follow suit.”

10. Research shows that public goals are more likely to be attained than ones that are held private. In a recent survey of 1,000 workers in the U.S., 92% said they would be more motivated to reach their goals if colleagues could see their progress.
11. According to *Harvard Business Review*, companies with highly aligned employees—where their everyday activities are tied to the organization’s vision—are more than twice as likely to be top performers. But alignment is rare: studies suggest only 7% of employees fully understand the company’s business strategy.
12. Healthy organizations encourage some goals to emerge from the bottom up. Google has “20% time” which frees engineers to work on side projects for the equivalent of one day a week.
13. Intuit Chief Information Officer Atticus Tysen says the key for Intuit to succeed was for all OKRs to be visible throughout the company. For those working outside headquarters, OKRs ended the mystery of what was happening back at HQ, making the company more cohesive.
14. Tracking is a key part of the OKR system. Robust, cloud-based OKR management software packages allow users to navigate a digital dashboard to create, track, edit, and score their OKRs. Such platforms promote internal networking, drive engagement, and make everyone’s goals more visible.
15. Reflecting on successful completion of an objective is critical: a Harvard Business School study found that learning from direct experience is more effective when coupled with reflection.
16. Studies found that people who recorded their goals and sent weekly progress reports to a friend attained 43% more of their objectives than those who merely thought about their goals.
17. Bill Gates notes that people in philanthropy often confuse the mission, which is directional, with the objective, which is the set of concrete steps you’re actually engaged in. “Having a good mission is not enough. You need a concrete objective, and you need to know how you’re going to get there.”
18. At Google, Larry Page expects team members to create products and services that are ten times better than the competition, not just improving on existing systems but reinventing them. Aspirational OKRs are set at 60-70% attainment, meaning that performance is expected to fall short at least 30% of the time. Team members are encouraged to try and fail.
19. Ten percent of Fortune 500 companies have ditched the annual review. Adobe discovered that annual reviews were costing the company 80,000 manager hours a year and in 2012 dropped them in favor of continuous performance management—this combines the quarterly goals and tracking of OKRs with conversations, feedback, and recognition to lift everyone’s achievement.
20. The rulebook tells people what they can or can’t do, but the culture of the organization can tell people what they *should* do. Or, as business philosopher Dov Seidman puts it, “What we choose to measure is a window into our values, and into *what* we value.”

SUMMARY

Measure What Matters shows how to implement the OKR system—Objectives and Key Results—for any team or organization. An Objective is a concrete, action-oriented thing that needs to be achieved; Key Results are the specific, measurable and verifiable steps that will meet the objective. The OKRs system is built on four superpowers. The first is focusing on the handful of initiatives that can make a real difference and deferring the less important ones; this allows leaders to commit to those choices and makes for a successful organization. The second is the ability to align and connect. OKR transparency means that not only are everyone’s goals openly shared, but individuals also link their objectives to the company’s overall game plan, and coordinate with other teams. The third OKR superpower is that they can be tracked; they are driven by data, with periodic check-ins, objective grading, and continuous reassessment. The final OKR superpower is the system’s ability to motivate people to excel by doing more than they had thought possible. Setting conservative goals stymies innovation; setting ambitious ‘stretch’ goals encourages people to go outside their comfort zones.

The OKR system

Google co-founder Larry Page calls OKRs “a simple process that helps drive organizations forward,” and says that “OKRs have helped lead us to 10x growth, many times over.” Objectives and Key Results—OKRs—is a collaborative goal-setting protocol for companies, teams, and individuals; it is a way to surface primary goals, channel efforts, and coordinate.

The OKR system has been adopted most widely in the tech industry, where agility and team work are imperative, but is also found at household names such as Disney and Exxon; at smaller start-ups where having everyone pulling in the same direction is a survival tool; at rapidly-scaling organizations that need a shared language for execution; and in larger enterprises where they function as neon-lit road signs.

An Objective is WHAT is to be achieved: something significant, concrete, action oriented, and (ideally) aspirational. An objective can be long-lived, rolled over for a year or even longer.

Key Results benchmark and monitor HOW we get to the objective: they are specific, time-bound, aggressive yet realistic, and most of all, measurable and verifiable. At the end of a designated time period, typically a quarter, the Key Result is declared fulfilled or not. Key Results can evolve as the work progresses, but once they are all completed, the objective is achieved (and if not, then the OKR was poorly designed).

To put it another way, Objectives are the stuff of inspiration and far horizons. Key Results are metric-driven and earth bound; they are the levers you pull and the marks you hit, to achieve the Objective.

Among experiments in the field of management theory, 90% confirm that productivity is enhanced by well-defined, challenging goals. Alienation saps the bottom line; engaged work groups generate more profit and less attrition. A two-year study by Deloitte found that, to build

engagement, the biggest impact comes from “clearly defined goals that are written down and shared freely.” Most effective is when those goals are linked to the team’s broader mission.

Google

In 1999 Google was the 18th search engine to arrive on the web. The company needed to make tough choices, keep its team on track, and measure what mattered; OKRs became the tool that institutionalized the founders’ “think big” ethos, the scaffolding on which Google built seven products with a billion or more users each—Search, Chrome, Android, Maps, YouTube, GooglePlay, and Gmail.

In 2017, for the sixth year in a row, Google topped *Fortune* magazine’s list of Best Companies to Work For. It is a company rooted in strong and stable leadership, massive technical resources, and a values-based culture of teamwork, transparency, and relentless innovation.

Peter Drucker

In his landmark 1954 book *The Practice of Management* Peter Drucker noted that people are more likely to complete a course of action when they helped to choose it. We can see the genesis of OKRs in Drucker’s principle of “management by objectives” or MBOs.

The results were impressive: in companies such as HP, where MBOs were embraced, productivity rose by as much as 56%. But, MBOs also had limitations: centrally-planned goals were slow to trickle down through the hierarchy; they became stagnant without frequent updating; or, they were tied to salaries, so that risk taking ended up being penalized.

Intel and Operation Crush

At Intel, head of operations and eventual-CEO Andy Grove asked, how do we define and measure output by knowledge workers, and how can we increase it? Applying manufacturing production principles to professional and managerial ranks, Grove went beyond MBOs to develop the OKR system.

Grove emphasized that less is more: a few well-chosen objectives, a limit of 3-5 per cycle, imparts a clear message. He emphasized setting goals from the bottom up; to promote engagement, teams and individuals should create about half of their own OKRs. Do not dictate—collective agreement is essential to goal achievement—and stay flexible: key results can be modified, even discarded, mid-cycle if an objective no longer seems practical or relevant as written. He also emphasized the importance of daring to fail: stretch goals push organizations to new heights. OKRs are a tool, not a weapon or a contract; keep them separate from bonuses to encourage risk taking. Finally, be patient and resolute: it can take four or five cycles to really embrace the OKR system and longer to build ‘goal muscle.’

In late 1979 Intel was facing an existential threat: having successfully led the initial microprocessor revolution, the company was getting beaten by Motorola’s new 68000 chip. Led by Andy Grove, Intel used the OKR system to reboot the company’s priorities in just four weeks.

Dubbed Operation Crush, Intel's battle plan to "crush" Motorola was clear, precise, and fast. Days of brain-storming by senior management culminated in a plan to mobilize the company. The sales force was brought into the loop and eagerly embraced the new strategy. OKRs gave management a tool for rapid implementation, allowing a near-billion-dollar company to turn on a dime. By 1986 Intel's 8086 microprocessor had captured 85% of the 16-bit market.

The OKRs system is built on four superpowers: focus and commit to priorities; align and connect for teamwork; track for accountability; and stretch for amazing results.

Focus and commit

To measure what matters, start with the question: "What is most important for the next three (or six, or twelve) months?" Focusing on the handful of initiatives that can make a real difference and deferring the less important ones allows leaders to commit to those choices and makes for a successful organization. High-performance organizations focus on the work that is important and are just as clear on what doesn't matter. OKRs are precision tools that dispel confusion and give the focus needed to win for departments, teams, and individuals.

Leaders must commit, publicly, to OKRs; and must get across the "why" as well as the "what." Otherwise, flawed goal-setting can lead to disastrous consequences, like Wells Fargo's drive to open accounts—the ruthless one-dimensional focus on sales targets led to branch managers feeling pressured to open millions of fraudulent accounts. The subsequent consumer banking scandal may have damaged the Wells Fargo brand beyond repair.

In most cases, the ideal number of quarterly OKRs will be between three and five. Too many blurs the focus on what counts. Above all, the objectives must be something significant, something that moves people forward in the here and now. Key results should be succinct, specific, and measurable. A mix of outputs and inputs can also be helpful. Clear-cut time frames intensify focus and commitment; and nothing motivates us more than a deadline.

The story of Nuna

Nuna is a health care data platform and analytics company whose founders used OKRs to clarify priorities for the entire organization. Initially, the OKR process didn't take very well—until the founders realized that they themselves had to show a sustained commitment to their own OKRs, to help their teams to do the same. CEO Jini Kim says. "Until your executives are fully on board, you can't expect contributors to follow suit."

Using OKRs to act purposefully on quarterly plans, rather than just reacting to external events, allowed Nuna to expand in just four years from self-insured employers to the massive Medicaid database to a suite of new health plan products. It was able to leap from state-level computing silos to the first system-wide view across the entire Medicaid program. Today, the company is looking to leverage its platform of data to drive analytics and to inform policymakers.

Align and connect

The second OKR system superpower is the ability to align and connect. OKR transparency means that not only are everyone's goals openly shared, but individuals also link their objectives to the company's overall game plan, and coordinate with other teams. Connecting each individual to the organization's success brings meaning to work; deepening people's sense of ownership fosters engagement and innovation. Research shows that public goals are more likely to be attained than ones that are held private. In a recent survey of 1,000 workers in the U.S., 92% said they would be more motivated to reach their goals if colleagues could see their progress.

In an OKR system, even the most junior staff can see everyone's OKR goals, all the way up to the CEO. This transparency seeds collaboration and cuts the toxic power of suspicion and politicking.

Alignment

According to the *Harvard Business Review*, companies with highly aligned employees are more than twice as likely to be top performers. Alignment occurs when managers and employees alike tie their everyday activities to the organization's vision. But alignment is rare—studies suggest only 7% of employees fully understand the company's business strategy and what is expected of them to reach the common goals. Global CEOs cite a lack of alignment as the number one obstacle between strategy and execution. Transparent OKRs can deliver that alignment.

At larger organizations in particular, goal-setting tends to cascade downwards from the executives to the rest of the staff. This can lead to a loss of agility, as each level waits for the waterfall to trickle down from above; and a loss of flexibility, as those downstream scramble to keep up with changes coming from on high. Cascading can block input from frontline employees, and it prevents horizontal connections across departmental lines.

To avoid soul-killing 'over-alignment,' healthy organizations encourage some goals to emerge from the bottom up. Google has "20% time," which frees engineers to work on side projects for the equivalent of one day a week. By freeing people to set at least some of their own objectives and almost all of their own key results, this approach encourages innovation. It also helps to bring the perspectives of people in the trenches into the center of the organization.

Connected companies are also quicker companies—when goals are public, a 'team of teams' can attack trouble wherever it surfaces.

The story of Intuit

Intuit has made *Fortune*'s list of the world's most admired companies for 14 years in a row. Over its history, the company has survived a series of competitive threats by staying one step ahead. The company's culture of transparency has enabled it to be more openly connected.

A few years ago, Intuit was busy pivoting in several directions at once as it moved to the cloud, which was both exciting and stressful. The chief information officer, Atticus Tysen, introduced OKRs to his direct reports to help the IT department to adapt. The following quarter he rolled out the system to the director level; and the quarter after that, to all 600 IT employees.

Tysen says the key for Intuit to succeed was for all OKRs to be visible throughout the company. For those working outside headquarters, OKRs ended the mystery of what was happening back at HQ, making the company more cohesive. When a new project comes up for discussion, everyone asks how it fits into the OKR template. “OKRs have consolidated our far-flung department,” opening it horizontally across teams.

In the cloud era, OKRs can be particularly effective as horizontal alignment comes naturally. With transparent OKRs, Tysen says, “the data and analytics team could see from the start what our financial systems team had in mind ... The teams linked up their objectives in real time, rather than after the fact—a sea change from our historical way of doing things.”

Track

The third OKR system superpower is that they can be tracked. OKRs are driven by data, with periodic check-ins, objective grading, and continuous reassessment. They can be revised as circumstances dictate.

OKR lifecycle

There are three phases to the OKR lifecycle, starting with setting up. Here, the most important thing is to make sure that everyone’s OKRs can be easily found and shared—the system is not truly transparent if nobody sees the goal you shared. There are now a number of robust, cloud-based OKR management software packages available, that allow users to navigate a digital dashboard to create, track, edit, and score their OKRs. Such platforms promote internal networking, drive engagement, and make everyone’s goals more visible. It is also important to make sure that the team deploying it adopts OKRs universally. This may mean appointing one or two OKR ‘shepherds’ to get everyone on board.

The second phase is holding regular mid-cycle check-ins. Writing down a goal increases your odds of attaining it; and monitoring your progress with colleagues increases the odds even more—two integral features of the OKR system. A study in California found that people who recorded their goals and sent weekly progress reports to a friend attained 43% more of their objectives than those who merely thought about their goals.

At each check-in, you have one of four options: continue; update (i.e., modify a Key Result or Objective to respond to changed circumstances); start (i.e., launch a new OKR when the need arises); or stop. When an OKR has outlived its usefulness, drop it—but also reflect on it, asking what you learned that can be applied in the future. An OKR dashboard is a real time means of flagging what needs attention. At Google, the benchmark check-in cycle is monthly, but

frequency varies with the business needs of the moment. The most physically dispersed teams check in the most frequently.

The final phase is the wrap-up, which comprises objective scoring, subjective self-assessment, and reflection. A low score begs the question, is the objective still worth pursuing? If so, what can we change to achieve it? On the other hand, if a team or department approaches 100% in its OKR scoring, it probably its sights too low! The key is to set aggressive goals; achieve most of them; accept that there will be some that were not met and reflect thoughtfully on why that may be the case; reflect on what was achieved; and then repeat the cycle. A Harvard Business School study found that learning from direct experience is more effective when coupled with reflection.

The Gates Foundation

The Gates Foundation at its launch in 2000 was something wholly new—a \$20 billion startup. Within two years it had scaled to the point that it needed a more structured form of goal-setting. The Foundation embraced OKRs to deliver the real-time data needed to wage war against malaria, polio, and HIV. Bill Gates says using the OKR approach with grant reviews allows the team to judge whether a proposal has clear goals and fits the Foundations objectives. People in philanthropy often confuse the mission, which is directional, with the objective, which is the set of concrete steps you're actually engaged in. "Having a good mission is not enough. You need a concrete objective, and you need to know how you're going to get there."

Using OKRs, the Foundation can set an ambitious top-line goal, like eliminating Guinea worm disease, then set quarterly and annual beats for key results, to know whether the resources being used are making progress against the goal. (After a series of grants from the Foundation, programs have reduced the incidence of Guinea worm disease from 75,000 in 2000 to just 22 in 2015.)

Stretch

The final OKR superpower is the system's ability to motivate people to excel by doing more than they had thought possible. Setting conservative goals stymies innovation; setting ambitious 'stretch' goals encourages people to go outside their comfort zones. It allows people to embrace what Jim Collins calls BHAGs—Big Hairy Audacious Goals. People with hard goals may reach them less often, but they also consistently perform at a higher level than people with easy goals. Stretched workers are more productive and more engaged.

Google divides its OKRs into two categories: committed goals, which are tied to the company's metrics around product releases, hiring, and customer, and are to be met 100% within a set time frame; and aspirational goals, which are bigger-picture, higher-risk ideas where an average 40% failure rate is to be expected. Aspirational goals draw on all four OKR superpowers—they can only be met by a transparent and connected organization that has focus and commitment, and that tracks progress toward the objective.

Intel's Operation Crush set the ambitious goal of 2,000 design wins in one year—which required one win per sales person per month, effectively tripling their numbers. At the end of the year, the team had won over 2,300 new accounts and Intel's future was secured.

At Google, Page expects team members to create products and services that are ten times better than the competition, not just improving on existing systems but reinventing them. Aspirational OKRs are set at 60-70% attainment, meaning that performance is expected to fall short at least 30% of the time. Team members are encouraged to try and fail.

Continuous performance management

Continuous performance management is slowly taking the place of the annual review in HR systems. Ten percent of Fortune 500 companies have ditched the annual review. Adobe discovered that annual reviews were costing the company 80,000 manager hours a year and in 2012 dropped them in favor of continuous performance management. This is the younger sibling of OKRs; combined with the quarterly goals and built-in tracking of OKRs it uses conversations, feedback, and recognition to lift everyone's achievement.

At Google, OKRs amount to a third or less of performance ratings. More important is feedback from cross-functional teams and most of all context. One-on-one meetings with managers allow for goal setting and reflection; ongoing progress updates; two-way coaching; and light-touch performance reviews.

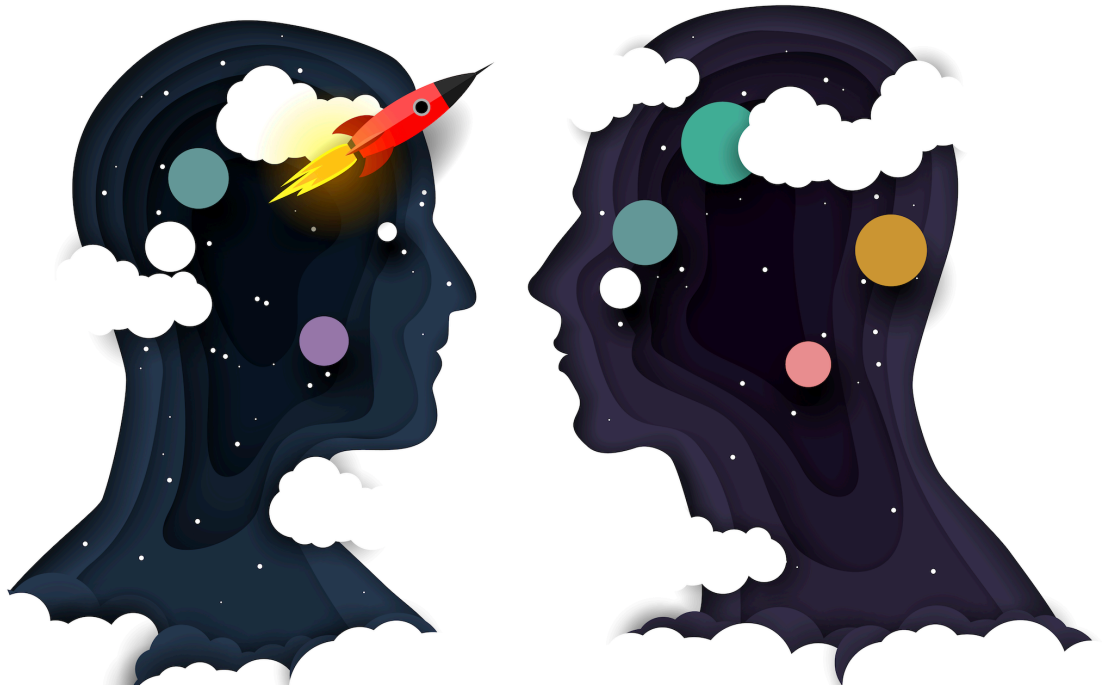
To reap the full benefit of OKRs, feedback becomes a critical component of continuous performance management, along with continuous recognition from managers and peers that is tied to company goals and strategies.

At Adobe managers, employees, and peers join in multiple check-in conversations a year. These focus on quarterly OKRs, feedback, and career development. The result is more engaged employees who want to stay with the company.

An OKR culture is an accountable culture, transparent and vision-based. The rulebook tells people what they can or can't do, but the culture of the organization can tell people what they *should* do. Or, as business philosopher Dov Seidman puts it, "What we choose to measure is a window into our values, and into *what* we value."

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	Beginning (1)	Developing (2)	Progressing (3)	Advanced (4)
Reliability	Regularly misses class and/or deadlines. Individual cannot be relied upon to follow-through on commitments.	Individual is inconsistently reliable. Attendance can be sporadic. At times, individual shows potential and initiative.	Attendance and follow-through is consistent. Individual is self-motivated and can be relied upon regularly.	Contributes substantially to learning process both by "showing up" and by encouraging and challenging others to fully participate.
Collaboration	Rarely exhibits a cooperative interested attitude towards teamwork.	Is a cooperative team member but requires motivation to collaborate and function at a higher level.	Actively participates well in a team environment. Individual shows initiative and develops win-win solutions.	Functions at a very high level as a team player. Is very skilled as team leader in collaboration and handling team conflict/ disagreement.
Communication	Does not listen and or unable to summarize key elements of verbal and nonverbal communication. Does not clearly express thoughts verbally and nonverbally.	Offers "safe" answers to simple questions and occasionally volunteers a response. Individual is beginning to develop organized and appropriate verbal and nonverbal responses.	Communicates effectively (both verbally and nonverbally). Actively listens to others without interruption. Individual contributes to class discussion by offering thoughts, opinions and asking appropriate questions.	Skilled at creating an open environment that encourages the flow of information. Verbal and nonverbal communication conveys both substance and intent with high accuracy.
Respect	Does not respect other's rights, ideas, opinions and diversity of others.	Developing respect of other's rights, ideas, opinions and diversity of others.	Demonstrates respect of other's rights, ideas, opinions and diversity of others.	Respects the rights, ideas, opinions and diversity of others. Encourages others to express viewpoint without judgement.

	Beginning (1)	Developing (2)	Progressing (3)	Advanced (4)
Professionalism	Individual does not take personal responsibility for appearance, behavior, actions, or verbal communication.	Shows inconsistent evidence ability to manage their behavior or actions, appearance, or verbal communication.	Individual takes personal responsibility for their appearance, verbal communication, behavior or actions.	Accepts full responsibility for own appearance, behavior and actions. Individual is a leader and role model in opportunities in helping classmates monitor and progress in their behavior, communication, and behavior skills.
Attitude	Regularly displays a negative attitude. Is often perceived as pessimistic, self-centered and/or discouraging.	Attitude occasionally fluctuates between positive/encouraging to negative/pessimistic.	Makes a positive impression to those around them. Creates and sustains an attitude that encourages others to do their best.	Demonstrates a positive and encouraging attitude even in the face of adversity. Leads as a role model in shows empathy and compassion towards others.
Problem Solving	Does not attempt to identify, describe, or solve the problem	Individual primarily depends on others to solve problems and identify possible solutions.	Find multiple ways to solve a problem and share the strengths and weaknesses of a solution with a variety of audiences.	Individual is a leader that can plan and organize work, reason and make objective judgments, and keep their mind on several parts of their job.



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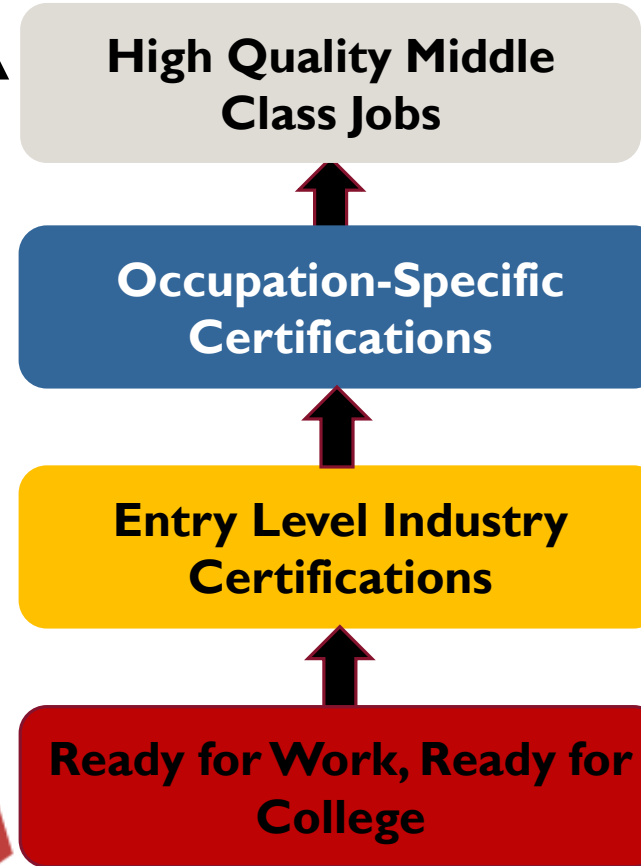
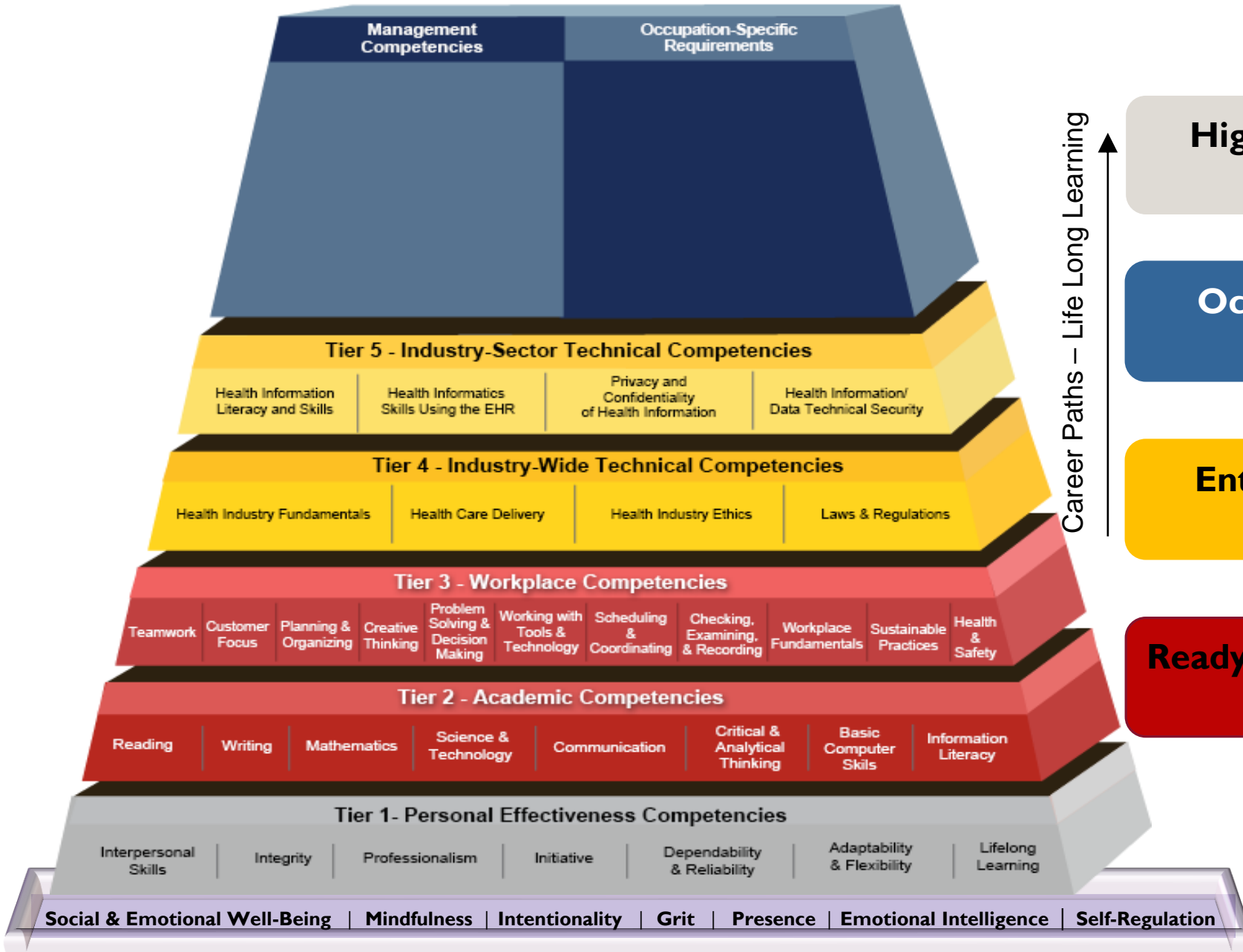
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Modified from USDOL Career One Stop
<https://www.careeronestop.org/CompetencyModel/competency-models/electronic-health-records.aspx>

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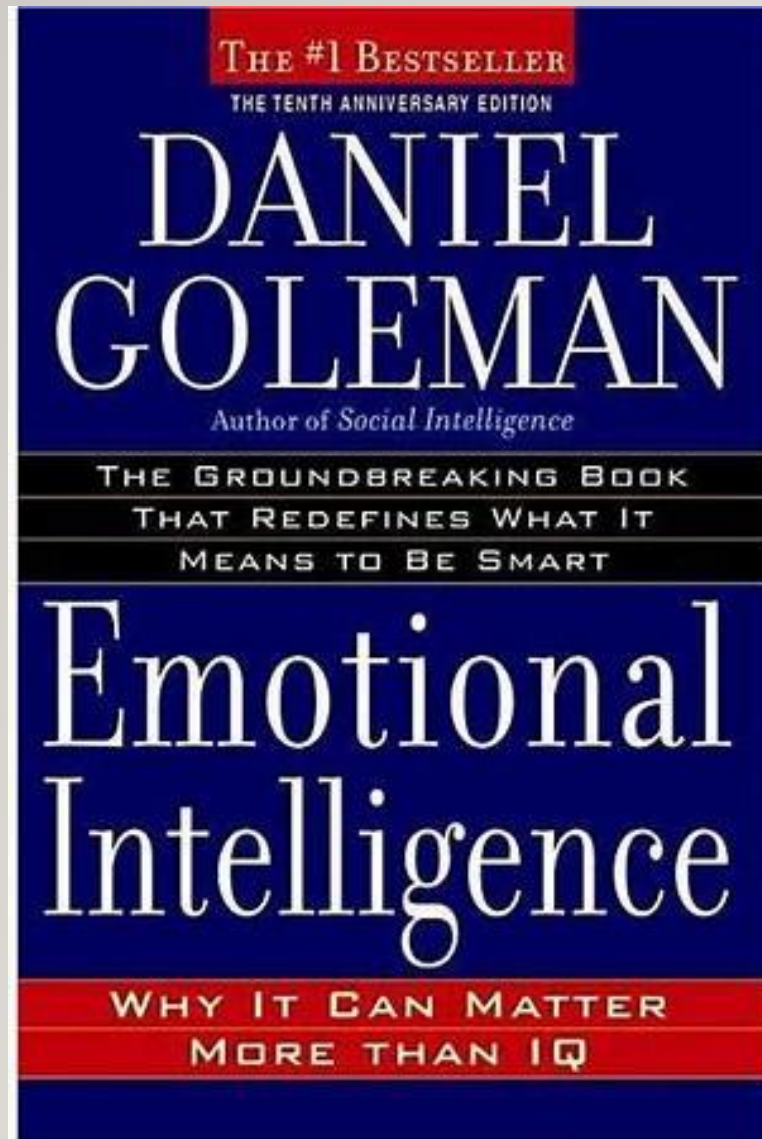
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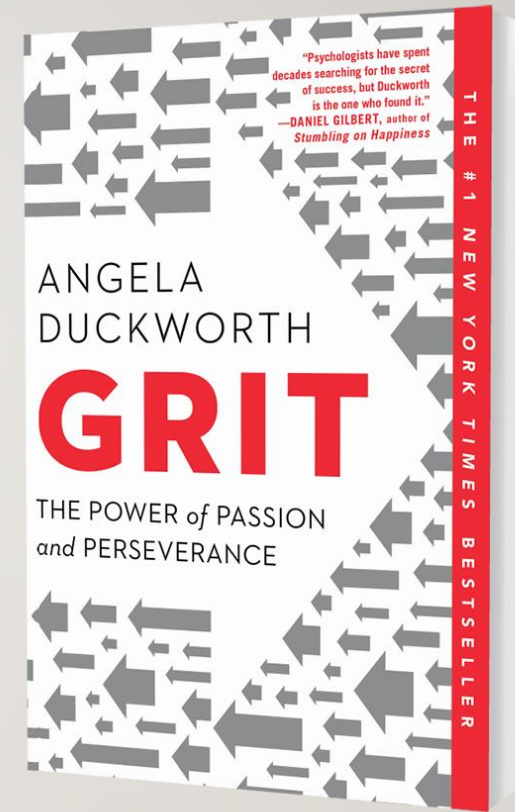


The ACE Pyramid represents the conceptual framework for the ACE Study, which has uncovered how adverse childhood experiences are strongly related to various risk factors for disease throughout the lifespan, according to the [Centers for Disease Control and Prevention](#).^{[5][6]}

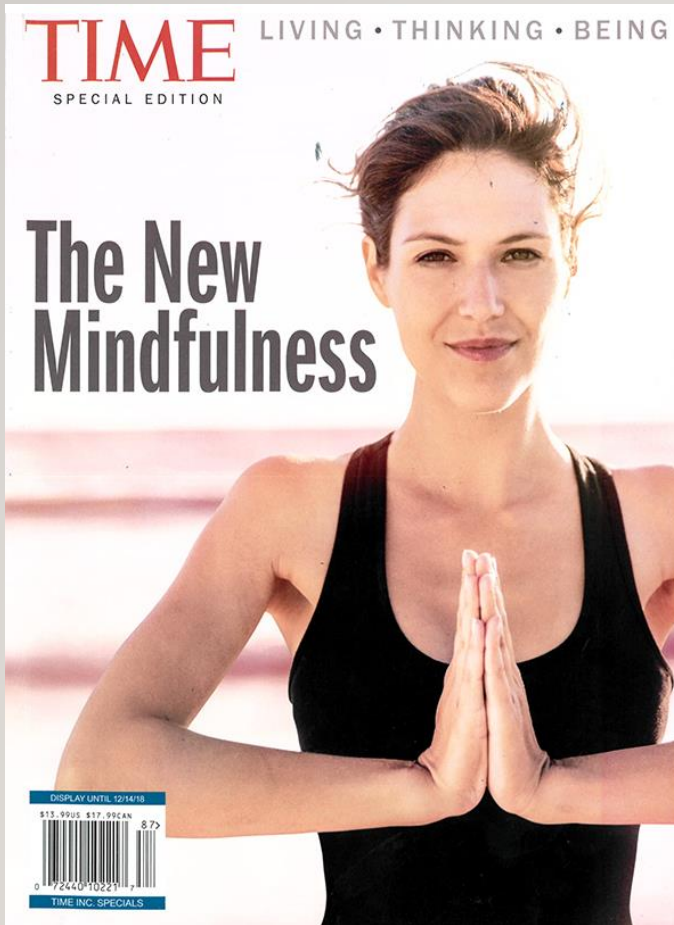


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