

INVEST	INNOVATE	IMPACT
<ul style="list-style-type: none"> ○ Focus on data to prioritize investments. ○ Optimize ROI through resource management. ○ Increase resources for workforce development. 	<ul style="list-style-type: none"> ○ Pursue practices & programs that can be scaled up. ○ Develop strategic partnerships. ○ Lead efforts that result in employment and advancement. 	<ul style="list-style-type: none"> ○ Mobilize opportunities that support industry sectors. ○ Foster development of career pathways. ○ Educate communities about workforce services available.

5. DISCUSSION and POSSIBLE ACTION – Sara Hummel, Jones & Roth

Accept the FAT’s recommendation to approve the PY19-20 Final Audit Report *(5 minutes)*

- Communications Letter (Attachment 5.1, Separate Attachment)
- Management Letter (Attachment 5.2, Separate Attachment)
- Financial Statement – Final (Attachment 5.3, Separate Attachment)

6. DISCUSSION and POSSIBLE ACTION – Linda Dugan, NOW Board Treasurer

Accept the FAT’s recommendation to approve the PY20-21 December Budget to Actual and new funding budget changes (Attachment 6.1, Page 29) *(10 minutes)*

7. DISCUSSION and POSSIBLE ACTION – Heather DeSart, NOW ED

Accept Staff’s recommendation to approve the MOU with Willamette Workforce Partnership to better serve common customers in Linn, Benton, and Lincoln Counties *(5 minutes)*

- No money exchange between regions
- Allow for tag-on procurement to align service provision
- Co-facilitate sectors where we are serving common businesses/industry members
- Seek discretionary funds as a multi-regional approach in support of healthcare and manufacturing shared sector priorities
- Better align with partner districts that still have previous boundaries including housing organizations, community action, and DHS

8. DISCUSSION and POSSIBLE ACTION – Heather DeSart, NOW ED

Accept Staff’s recommendation to approve the updated Local Plan, pending no receipt of significant public comment, with inclusion of impacts of COVID plans to enter into a partnership with Willamette Workforce Partnership to serve our common customers in Linn, Benton, and Lincoln Counties (Attachment 8.1, Separate Attachment) *(5 minutes)*

9. INFORMATION

Program, Strategic Plan, and CSC/Equus update – Karen Litvin, NOW Program & Compliance Director (Attachments 9.1, Page 34 & 9.2, Page 35) *(15 minutes)*

10. INFORMATION

One-Stop-Operator Report – Kendall Lenhares *(20 minutes)*

11. INFORMATION

Equus-Program Success Stories – Diana Nish, and Angeline Chan Pepper *(10 minutes)*

12. INFORMATION

Oregon Employment Department Economic Update – Erik Knoder and Shawna Sykes, OED *(20 minutes)*

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13. BOARD CHAIR REPORT – Tony Erickson, Chair

14. EXECUTIVE DIRECTOR’S REPORT – Heather DeSart, NOW Executive Director

15. BOARD MEMBER COMMENTS – Roundtable

16. SECOND PUBLIC COMMENT SECTION

Please clearly state your name and address for the record. Each public comment will be limited to three (3) minutes at the Chair’s discretion.

17. ADJOURN

Northwest Oregon Works meetings are open to the public and conform to Oregon Public Meetings Laws. A request for an interpreter for the hearing impaired or, other accommodations for persons with disabilities, should be made at least 72 hours in advance of the meeting to our office at (541) 921–9241, or Emily@onwib.org. . TTY is available at 711 or (800) 735-2900.

Attachment 4.1

MINUTES

NORTHWEST OREGON WORKS JOINT BOARD OF DIRECTORS and CONSORTIUM BOARD MEETING

October 23, 2020 10:00 a.m. - 12:00 p.m.

Zoom Call

Present:

Board:

Tony Erickson, Oregon AERO, Chair; **Lauren Smith**, DHS, VocRehab; **John Hawkins**, Service Employees International Union; **Linda Dugan**, Linda Dugan Insurance, Treasurer; **Birgitte Ryslinge**, Oregon Coast Community College; **Heather Clark**, Alterations by Heather; **Stephanie Hurliman**, Oregon Employment Dept.; **Ivan Castille**, Laborers Local 737; **Amanda Morris**, Samaritan Health Service; **Zach Poole**, Pig' n Pancake, Vice Chair/Secretary; **Josh Kvidt**, Alyrica; **Cami Aufdermauer**, Tillamook County Habitat for Humanity; **Ann Buchele**, Linn-Benton Community College

Consortium:

Doug Hunt, Lincoln County Commissioner; **Pamela Wev**, Clatsop County Commissioner; **Pat Malone**, Benton County Commissioner; **Mary-Faith Bell**, Tillamook County Commissioner; **Henry Heimuller**, Columbia County Commissioner

Excused:

Rod Belisle, NECA-IBEW Electrical Training Center; **Henry Balensifer III**, LEKTRO; **Terre Cooper**, Tillamook County Economic Development; **Todd Simmons**, Tillamook Peoples' Utility District; **Whitey Forsman**, Pacific Oyster

Staff:

Heather DeSart, NOW Executive Director; **Jason Swain**, NOW CFO; **Emily Schwartz**, NOW Office Manager

Guests:

Shawna Sykes, Oregon Employment Department; **Erik Knoder** Oregon Employment Department; **Camille Padilla**, Equus; **Diana Nish**, Equus; **Angeline Chan-Pepper**, Equus; **Sandi Pickering**, Equus; **Karen Litvin**, Project Masters; **Kate Porsche**, Benton County Economic Development; **Jordan MacDonald**, Equus; **Carley Curtis**, Equus;

1. CALL TO ORDER, CONFIRMATION OF POSTING, and ROLL CALL

Chairman Erickson called the Meeting to order at 10:06 am.

a. NOW Board

Chairman Erickson asked for confirmation of the public posting of the meeting; Emily Schwartz confirmed; Roll Call taken, and Quorum established.

b. Consortium Board

Commissioner Hunt asked for confirmation of the public posting of the meeting; Emily Schwartz confirmed; Roll Call taken, and Quorum established.

2. REVIEW and APPROVE AGENDA

Ms. DeSart stated that item 6 had a typo in the Bylaws revision. The strikethrough of the word Secretary was not intended and was to be kept in the revised Bylaws.

BOARD:

MOTION: Linda Dugan

SECOND: John Hawkins

MOTION CARRIED.

CONSORTIUM:

Unanimous Consortium Approval

MOTION CARRIED.

3. PUBLIC COMMENT SESSION

There were no comments from the public.

4. DISCUSSION and POSSIBLE ACTION

Accept Staff's recommendation to approve the Minutes of the August 28, 2020 Board Meeting.
NOW Board

BOARD:

MOTION: Cami Aufdermauer

SECOND: Heather Clark

MOTION CARRIED.

Accept Staff's recommendation to approve the Minutes of the June 26, 2020 Consortium Meeting.
Consortium Board

CONSORTIUM:

MOTION: Pat Malone

SECOND: Mary-Faith Bell

MOTION CARRIED.

5. DISCUSSION and POSSIBLE ACTION – Linda Dugan, NOW Board Treasurer

Accept the FAT's recommendation to approve the PY2020-21 Revised Annual Budget – Board then Consortium

Ms. Dugan explained that there were a few changes made to the annual budget and the Financial Advisory Team had met to go over them. There was some discussion with the team about the changes, but they were fine with the revisions.

BOARD:

MOTION: John Hawkins **SECOND:** Heather Clark **MOTION CARRIED.**

CONSORTIUM:

MOTION: Pat Malone **SECOND:** Mary-Faith Bell **MOTION CARRIED.**

6. DISCUSSION and POSSIBLE ACTION: BOARD

Accept Staff's recommendation to approve the revised Board Bylaws

There was confusion about the audit draft approval item that was removed before posting. Ms. DeSart explained she went over the draft agenda with Chairman Erickson and Commissioner Hunt prior to the removal of the item. The final audit report will be presented at the January meeting.

Chairman Erickson handed the item over to Ms. DeSart to explain the changes to the Bylaws that would remove term limits to Board Officers positions, and to align with the State's Bylaws. She explained she had sent out an email prior to the meeting to explain the change and had only received one response opposing the change.

Ms. Hurliman stated that she was the one who was opposed to the changes and explained why. She stated that a regular rotation was healthy for a board and gets other board members involved.

Ms. Dugan asked if there had been any other members interested in the Board Chair position.

Ms. DeSart stated that there had not been any other interested parties.

Mr. Kvidt asked for clarity as to why the change was proposed and why the parameters were put on in the first place. Ms. DeSart explained we did want to align with the state as well as allow the board the flexibility to be held to something that is self-imposed. She stated that the Bylaws were already put in place by a group of contractors before she came on as the Executive director. Mr. Kvidt explained that he agreed with Ms. Hurliman's comments and believes that rotations is healthy for the board.

Ms. Clark stated that she agreed with the comments but that she believes that the language in the revision shows that there is still an option for a change in officers at any point.

Mr. Castille stated that he appreciated the flexibility that the change offers.

MOTION: Ivan Castille

SECOND: Heather Clark

Aye Votes: 8

Nay Votes: 2

MOTION CARRIED.

7. DISCUSSION and POSSIBLE ACTION: BOARD

Accept Staff's recommendation to Nominate and Reappoint Board Officers:

a. Tony Erickson – Board Chair

Chairman Erickson recused himself and Vice Chair Poole asked for any other nominations.

There were no other nominations.

Vice Chair Poole nominated Tony Erickson for reappointment. Cami Aufdermauer seconded.

Unanimous aye votes. Motion Carried.

Tony Erickson will begin his third term as Board Chair on November 1, 2020. His term will end on October 31, 2022.

Board Chair Erickson resumed his duties as Chair following his reappointment.

b. Zach Poole – Vice Chair/Secretary

Chairman Erickson nominated Zach Poole for reappointment; there were no other nominations. Unanimous aye votes. Motion Carried.

Zach Poole will begin his second term as Vice Chair/Secretary on November 1, 2020. His term will end on October 31, 2022.

c. Linda Dugan – Treasurer

Chairman Erickson nominated Linda Dugan for reappointment; there were no other nominations. Unanimous aye votes. Motion Carried.

Linda Dugan will begin her second term as Treasurer on November 1, 2020. Her term will end on October 31, 2022.

8. DISCUSSION and POSSIBLE ACTION: CONSORTIUM BOARD

Reappointment of Board Member representing Business. The term will be October 23, 2020 – November 1, 2023 – **Todd Simmons, Tillamook PUD**

MOTION: Mary-Faith Bell SECOND: Pat Malone MOTION CARRIED.

Reappointment of Board Member representing Business. The term will be October 23, 2020 – November 1, 2023 – **Linda Dugan, Linda Dugan Insurance Agency**

MOTION: Mary-Faith Bell SECOND: Henry Heimuller MOTION CARRIED.

9. INFORMATION

Program and Strategic Goals Update – Karen Litvin

Ms. Litvin presented on the Boards Strategic Goals first and explained how staff felt they were doing at this point in the program year according to goals outlined by the Board previously. She stated that there were areas where NOW was doing well and exceeding, but there were some areas that needed improvement.

Following the Strategic Goals Update, Ms. Litvin gave her background in Workforce to the board before presenting the program report. She stated that movement on some of the programs was slow due to COVID-19 and staff training for Equus.

10. INFORMATION

Equus-Program Success Stories – Camille Padilla, Diana Nish, and Angeline Chan Pepper

Equus presented two participant success stories videos from Benton County: Sadie, a youth participant and Brady Shepherd, an adult participant.

11. INFORMATION

Oregon Employment Department Economic Update – Erik Knoder and Shawna Sykes, OED

Mr. Knoder presented on State and Region unemployment. While the unemployment has gone down, the level is still significant. According to indicators, more women are unemployed than men currently. He stated that indicators show that Oregon should be back to prerecession levels by 2023 provided there were no other shutdowns. Mr. Knoder also presented on some employment barriers that people face in the region.

12. INFORMATION

State of Economic Development in Benton County – Kate Porsche

Ms. Porsche presented on how Benton County was working to handle the COVID-19 situation, and the collaboration efforts with partners in other counties.

13. INFORMATION

State of Linn-Benton Community College – Ann Buchele

Ms. Buchele presented on the transition to the new College President and how the college was handling the challenges of dealing with COVID-19.

14. NOW BOARD CHAIR REPORT – Tony Erickson, Chair

Chairman Erickson stated he did not have a report for the board.

15. CHIEF LOCAL ELECTED OFFICIAL REPORT-Commissioner Hunt

Commissioner Hunt noted there was a good partnership with the maritime sector and the initiative was gaining traction.

16. NOW EXECUTIVE DIRECTOR’S REPORT – Heather DeSart, NOW Executive Director

Ms. DeSart let the Board know she was asked to be on the North Coast Regional Equity and Recovery Council.

17. BOARD MEMBER COMMENTS – Roundtable

There were no comments.

18. SECOND PUBLIC COMMENT SECTION


Please clearly state your name and address for the record. Each public comment will be limited to three (3) minutes at the Chair’s discretion.

Diana Nish let the board know that she had attended the Accessing Union Apprenticeship workshops and would send out information on that at a later time.

19. ADJOURN

The meeting was adjourned at 12:10 p.m.

Attachment 4.2

	POLICY A06: REMOTE WORK
	APPROVED: 12/1/2020
	<input checked="" type="checkbox"/> NEW <input type="checkbox"/> REVISED

PURPOSE

Northwest Oregon Works (NOW) is a virtual office environment. As a virtual office, employees can work from anywhere while still utilizing the mailing address, phone services, meeting rooms, and videoconferencing of the organization. Our staff operates as one unit to serve customers and conduct work, but we do not operate from a fixed location.

NOW believes that a virtual office arrangement can lead to greater productivity, as it frees workers from administrative tasks, as well as commutes. Each employee can work from the location that is most convenient, and the business is not restricted to hiring employees who live in the same vicinity of the five-county workforce area. The purpose of this policy is to establish protocols for remote work.

POLICY

Agreement

Because we are a virtual office environment, all employees will complete a remote work agreement, Attachment A. Employees should indicate their primary working address in the remote working agreement which will also outline their responsibilities as remote employees and basic schedule.

Compensation and Work Hours

Employee's compensation, benefits, work status and work responsibilities do not change due to the remote work environment. The time each employee is expected to work per day or pay period also does not change as a result of remote work.

Schedule

Employees will work according to a schedule agreed upon with their immediate supervisor. Schedules may vary from employee to employee, and may allow for non-traditional schedules outside of the typical work week.

Communication and Work Tracking

Employees must be available by phone and email during agreed-upon hours. Employees are expected to be available for meetings, and other meetings deemed necessary by management. Employees and supervisors will communicate regularly regarding work assignments, progress and completion. Employees will also keep track of assignments and daily progress toward completion using a method agreed upon with their supervisor and/or by the NOW team for work tracking. Employees may be asked to be flexible with schedules as necessary to meet a deadline or respond to a communication where time is of the essence. Employees who are not exempt from the overtime requirements of the Fair

Labor Standards Act will be required to accurately record all hours worked using NOW's time-reporting procedures.

Workspace

The employee shall designate a workspace within the remote work location for placement and installation of equipment to be used while working remotely. The employee shall maintain this workspace in a safe condition, free from hazards and other dangers to the employee and equipment. To ensure that employee performance will not suffer in remote work arrangements, we advise our remote employees to:

- Choose a quiet and distraction-free working space.
- Have an internet connection that's adequate.
- Dedicate their full attention to their job duties during working hours.
- Adhere to break and attendance schedules agreed upon with their supervisor.
- Ensure their schedules overlap with those of their team members for as long as is necessary to complete their job duties effectively.

On-site Visits

NOW has the right to make on-site visits (with 48 hours advance notice) to the remote work location for purposes of determining that the site is safe and free from hazards, and to maintain, repair, inspect, or retrieve NOW-owned equipment, software, data or supplies.

Equipment

The company may provide specific equipment and supplies for employees to perform their work duties. This may include computer hardware, computer software, phone lines, email, voice-mail, printers, work stations, connectivity to host applications, and other applicable equipment as deemed necessary.

The use of equipment, software, data supplies and furniture, when provided by NOW for use at the remote work location, is limited to authorized persons and for purposes relating to NOW business. NOW will provide for repairs to company equipment. When the employee uses her/his own equipment, the employee is responsible for maintenance and repair of equipment.

NOW reserves the right to make determinations as to appropriate equipment, subject to change at any time. Equipment supplied by the organization is to be used for business purposes only. The employee must sign an inventory of all NOW property received and agree to take appropriate action to protect the items from damage or theft. Upon termination of employment, all company property will be returned to the company, unless other arrangements have been made.

In the event that an employee is issued computer equipment, it is the responsibility of the employee to ensure that use of the device is in compliance with all NOW policies, legal and appropriate. Portable computer equipment, such as laptops, will be kept in the possession of the employee at all times while in transit. Computers, devices and equipment will not be left unattended in cars or other locations for any duration of time.

If a device or piece of equipment is damaged or stolen due to lack of compliance with these requirements, employees may be required to replace the item at their sole expense.

Office Supplies

NOW will supply the employee with appropriate office supplies (pens, paper, etc.) as deemed necessary and will also reimburse the employee for business-related expenses, such as phone calls and shipping costs, that are reasonably incurred in carrying out the employee's job. Out-of-pocket expenses for other supplies will be reimbursed only with prior approval by the Executive Director or designee. The company may pay work-related voice and data communication charges.

Materials and Information.

Any work-related materials will be kept in the designated work area and not be made accessible to others. Personal Identifying Information of employees, contractors, and participants will be kept securely. Passwords to electronic devices will not be shared and any printed materials with personal identifying information will be kept in a locked cabinet within the remote workspace. Employees must follow all policies and procedures regarding records management and confidentiality concerning employee and contractor information as well as participant data.

Worker's Compensation and Liability

Employees are covered by worker's compensation during work hours and while performing work functions in the designated remote work area. The company assumes no liability for injuries occurring in the employee's home workspace outside the agreed-upon work hours.

The company is not liable for loss, destruction, or injury that may occur in or to the employee's home. This includes family members, visitors, or others that may become injured within or around the employee's home.

Dependent Care

Employees will make arrangements for regular dependent care and understand that remote work environments are not a substitute for dependent care. In some circumstances, exceptions may be made for employees with caregiving responsibilities.

Taxes


It will be the employee's responsibility to determine any income tax implications of maintaining a home office area. The company will not provide tax guidance nor will the company assume any additional tax liabilities. Employees are encouraged to consult with a qualified tax professional to discuss income tax implications.



Remote Work Agreement

Employee Name:			
Job Title:			
Hire Date:			
FSLA Status	<input type="checkbox"/> Exempt	<input type="checkbox"/> Non-Exempt	
Remote Work Location:			
	Street Address	City, State, Zip Code	
Schedule:			
Equipment Issued:	NOW will provide the following equipment (list any inventory numbers):		
<p>By signing, the employee agrees to:</p> <ul style="list-style-type: none"> • Remain accessible and productive during scheduled work hours; • Comply with all NOW rules, policies, practices and instructions; • Maintain a safe and secure work environment at all times and report work-related injuries as soon as practicable; • Ensure that NOW-issued equipment will not be used by anyone other than the employee and only for business-related work; • Protect company tools and resources from theft or damage and to report theft or damage immediately; • Comply with NOW policies and expectations regarding information security; and • Return company equipment and documents within five days of termination of employment. <p>I understand that NOW reserves the right to modify this agreement for any reason at any time.</p>			
Employee Name: (printed)			
Employee Signature:		Date:	
Supervisor Signature:		Date:	

Attachment 4.3

	POLICY P11: SUPPORTIVE SERVICES AND NEEDS-RELATED PAYMENTS
	APPROVED: 10/28/2016 – NOW INTERNAL REVISION DATE: 11/24/20 REVISION APPROVED: 12/1/20
	<input type="checkbox"/> NEW <input checked="" type="checkbox"/> REVISED

PURPOSE

This policy addresses the use of WIOA Title I funds for supportive services and needs-related payments (NRPs) to support adults, dislocated workers, and youth participating in WIOA Title I activities.

BACKGROUND

The Workforce Innovation and Opportunity Act (WIOA) provides program guidelines for participant supportive services. Supportive services may only be provided to participants who are participating in career services (other than follow up career services) and/or training services and who are unable to obtain the services through other programs who provide such services.

POLICY

Providers may provide supportive services to eligible youth, adults, and dislocated workers in accordance with this policy. Supportive services may only be provided after it has been determined such services are necessary to enable the participant to participate in Workforce Innovation and Opportunity Act (WIOA) activities. The cost of supportive services must be both reasonable and competitive in price. Supportive services include:

- Assistance with transportation
- Assistance with child care and dependent care,
- Linkages to community services
- Assistance with housing,
- Assistance with educational testing
- Assistance with uniforms and other appropriate work attire and work-related tools, including such items as eye glasses and protective eye wear,
- Assistance with books, fees, school supplies, and other necessary items for students enrolled in post-secondary education classes,
- Reasonable accommodations for individuals with disabilities,
- Referrals to healthcare,
- and Needs Related Payments needed to enable individuals to participate in WIOA Title I activities.

Needs Related Payments

Needs-related Payments (NRP) are designed to provide a participant with financial assistance to help individuals meet their non-training expenses in order to help them to complete training successfully. Providers must ensure the appropriate use of NRP as an allowable supportive service for WIOA out of school youth, adult and dislocated worker program participants as follows. NOW must approve all NRPs prior to obligation of funds and/or payment of NRP by a provider.

Eligibility

Adults and Out of School Youth (18-24) must:

1. Be unemployed;
2. Not qualify for, or have ceased qualifying for, unemployment compensation; and
3. Be enrolled in a program of training services under WIOA sec. 134(c)(3).

A dislocated worker must:

1. Be unemployed, and:
 - a. Have ceased to qualify for unemployment compensation or trade readjustment allowance under TAA; and
 - b. Be enrolled in a program of training services under WIOA sec. 134(c)(3) by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed 6 months; or
2. Be unemployed and did not qualify for unemployment compensation or trade readjustment assistance under TAA and be enrolled in a program of training services under WIOA sec. 134(c)(3).

If these eligibility requirements are met, individuals may be awarded NRP from WIOA funding prior to the start date of training classes for the purpose of enabling them to participate in program of employment and training services that begin within thirty (30) calendar days. At that point or sooner, as appropriate, all participants must be enrolled in *Training Services*.

Amount

The level of needs-related payments made to adults and out of school youth will be \$55 per day while in training. A full \$55 per day will be issued to participants when they attend at least 50% or half-day of training; anything less they will not receive the \$55 Needs Related Payment. The daily amount is based on economically disadvantaged criteria which are updated annually, therefore, the NRP adult and youth level may be updated to reflect any changes. NOW may, at its sole discretion, approve partial payment of a needs-related payment for eligible participants, and may approve a higher daily payment on a case-by-case basis. These exceptions will be based on funds availability, barriers of the training participant, and type of training in alignment with NOW priorities for target populations and industry sectors.

For dislocated workers, payments must not exceed the greater of either of the following levels:

1. The applicable weekly level of the unemployment compensation benefit, for participants who were eligible for unemployment compensation as a result of the qualifying dislocation; or
2. The poverty level for an equivalent period, for participants who did not qualify for unemployment compensation as a result of the qualifying layoff. The weekly payment level must be adjusted to reflect changes in total family income, as determined by Local WDB policies.

Eligibility and need will be assessed and documented for each participant receiving NRPs. NOW will authorize all NRPs at its sole discretion based on demonstration of need, funds availability, and alignment with organizational priorities for training and employment programs.

Weekly payment levels must be adjusted to reflect changes in total family income. Limits may be placed on NRPs subject to availability of funds. The above adult, out of school youth and dislocated workers NRP levels will be used after determining need. The minimum NRP will be \$25 per week.

Administration and Oversight

1. Eligibility documentation and needs analysis including a budget (such as those shown in Attachments A and B) will be provided to NOW for review and approval prior to the authorization, obligation or payment of any NRP.
2. A copy of any UI entitlement decision or confirmation of UI benefits being exhausted will be maintained in each customer file or attestation form signed with above information.
3. A copy of the requests for training for each period of training (quarter, semester, block, class, etc.) will be maintained in each customer file. (A copy of the customers Individual Training Account (ITA) will be used as documentation).
4. Verification of enrollment/registration, participation, and completion of training (confirmation from training office or course instructor) will be maintained in each customer file. A copy of class schedule will be maintained in each customer file and will be used as documentation. Monthly verifications of attendance and training progress will be reviewed.
5. Each customer determined eligible and receiving NRPs will have signed a copy of to his/her understanding of the requirements and instruction.
6. All eligibility will be documented and maintained in the customer file.

Service providers are responsible for verification and documentation of eligibility for needs-related payments for adults, out of school youth and dislocated worker program participants.

REFERENCES

Proposed 20 CFR 680.300, 680.930, 680.940, 680.950, 680.960, and 680.970 – Adult and Dislocated Worker

Attachment A - Needs Related Payment Support Analysis Form

1. Are you unemployed or have you received notification of layoff?
 Yes **No**

2. Do you currently qualify for Unemployment Insurance benefits?
 Yes **No**

3. Do you currently qualify for additional state or extended Unemployment Insurance benefits (e.g., Training Benefits)?
 Yes **No**

4. Do you currently qualify for Trade Readjustment Allowances (TRA)?
 Yes **No**

5. Are you receiving any other federal or state income support? *Examples: TANF, Training Completion Aid?*
 Yes **No**

6. Do you need income support beyond these other resources in order to participate in training full-time?
 Yes **No**

Needs Related Payments (**NRP**) are not intended to provide the entire amount of income support you need to complete your training. If you are awarded an NRP, it will be based on this support analysis and budget you provide. These payments are made to help you while making satisfactory progress while attending training.


All answers and statements are true and complete to the best of my knowledge. I understand that providing untruthful or misleading answers are cause for denial of NRPs. Any overpayments or fraud based on my false or misleading answers could result in my repayment of any NRPs provided.

Signature	Date
Print Name	

Attachment B – Resource Worksheet for Needs Related Payment Determination

Monthly Income		Monthly Expense	
Personal		Rent/Mortgage	
Spouse/Partner		Electricity	
Other Family Members		Heating	
Child Support		Water/Sewer/Garbage	
Social Security		Telephone	
Maintenance/Alimony		Auto Payments	
Retirement		Day Care	
Workers Compensation		Medical Ins/Out of Pocket	
Public Assistance		Food	
Trade Act Allowance		Clothing	
Other		Fuel	
		Public Transportation	
		Other	
Total Monthly Income		Total Monthly Expenses	
BALANCE/DEFICIT Monthly			
BALANCE/DEFICIT Weekly		Weekly Training Expense	

Attachment 4.4

	POLICY P13: INCUMBENT WORKER TRAINING
	APPROVED: 1/27/2017 – NOW INTERNAL REVISION: 11/24/2020 APPROVED REVISION: 12/1/2020
	<input type="checkbox"/> NEW <input checked="" type="checkbox"/> REVISED

PURPOSE

The purpose of this policy is to outline the use of local Workforce Innovation and Opportunity Act (WIOA) funds for Incumbent Worker Training (IWT) programs.

POLICY

Incumbent Worker Training is designed to meet the special requirements of an employer (including a group of employers) to: retain a skilled workforce, avert the need to lay off employees, enable employees to advance on a career ladder, and/or to provide new or updated knowledge or skills in order to support retention, expansion and growth of the employer. Incumbent Worker training must increase both a participant's and a company's competitiveness.

NOW may expend up to 20 percent of its combined total of adult and dislocated worker allocations for incumbent worker training. Employers and trainees must meet eligibility criteria in order to participate in an IWT program, as outlined in Exhibit A. There are additional criteria that must be taken into account by NOW for an employer to receive IWT funds which are also outlined in the Incumbent Worker Training Application, Exhibit A.

Costs of Training

IWT projects are partnerships that involve investment by both employers and NOW. Participating employers will pay the following share of training costs:

- 10 percent of the cost for employers with not more than 50 employees
- 25 percent of the cost for employers with 51-100 employees; and
- 50 percent of the cost, for employers with more than 100 employees

The employer investment may be a cash or in-kind. The value of in-kind contributions must be demonstrated using documentation of fair market value of the contribution. Employers may contribute to the direct cost of training and training materials. The investment by the employer may also include the amount of the wages paid by the employer to a worker while the worker is participating in the training activity. Wages paid to the participant while in training can be included only as an in-kind contribution and will not be reimbursed. Employer cost share contributions must be tracked and documented. In addition, the methodologies for determining the value of in-kind contributions must be documented and conform to cost sharing requirements.

Awards

Employers will apply for funds using the IWT Application. At its discretion, NOW may use a competitive process with application deadlines to award resources and otherwise will allocate funds on a first-come first-serve basis while funds are available.

Funds will be awarded based on funds availability as well as need and appropriateness of training relevant to local industry priorities. The specific amount per project, number of employees to be trained, type of training, project outcomes and project requirements will be reviewed annually and are subject to change ongoing.

REFERENCES

WIOA Section 3(23)

WIOA Section 134(d)(4)

20 CFR 680.780, 680.790, 680.800, 680.810, and 680.820

2 CFR 200.306

Policy P05 Individual Training Account

Policy P07 On the Job Training, Limits and Procedures

Exhibit A
INCUMBENT WORKER TRAINING PROGRAM
EMPLOYER APPLICATION

Northwest Oregon Works (NOW) supports professional development as an integral part of effective workforce development. One way NOW demonstrates this support is through Incumbent Worker Training Programs (IWT). IWT programs provide training to existing workers in order to help them advance in a career pathway and/or to provide new or updated knowledge or skills in order to support retention, expansion and growth for the employer.

COSTS

IWT programs are partnerships wherein NOW and the employer co-invest in the training. Employers are responsible for a share of training costs based on number of employees as follows:

- 10 percent (10%) of the cost for employers with not more than 50 employees
- 25 percent (25%) of the cost for employers with 51-100 employees; and
- 50 percent (50%) of the cost, for employers with more than 100 employees

The employer investment may be a cash or in-kind. The value of in-kind contributions must be demonstrated using documentation of fair market value of the contribution. Employers may contribute to the direct cost of training and training materials. The investment by the employer may also include the amount of the wages paid by the employer to a worker while the worker is participating in the training activity. Wages may be applied to the amount of an employer's investment as an in-kind contribution only. NOW will not reimburse wages paid to trainees.

The following activities may be paid for with IWT funds:

- The cost of training for employees to learn: a new or updated technology, equipment or process; employer-specified or industry- specific skills;
- Train-the-trainer instruction to build the capacity of businesses;
- Training materials and supplies;
- Facility expenses directly related to and necessary for the training;
- Rental of tools and equipment critical to the project;
- Travel expense and per diem of instructor(s) at government-approved rates; and
- Instructor/trainer fees

Funds may not be used to pay for:

- Costs incurred prior to the approval date of the application;
- Construction or purchase of facilities or buildings;
- Equipment purchases;
- Business relocation expenses;
- Lobbying activities
- Activities that directly or indirectly assist, promote, or deter union organizing.

Employer Eligibility Criteria

Employers must meet all eligibility criteria in order to apply for IWT. Employer must:

1. Operate in Benton, Clatsop, Columbia, Lincoln and/or Tillamook Counties.
2. Operate within a NOW priority industry outlined in its local plan and/or operates in an in-demand, in-balance or declining industry as determined by labor market information.
3. Have operated in Oregon for at least one year and not relocated from another location resulting in layoffs in the preceding 120 days prior to date of application.
4. Be current on all state and local tax obligations including unemployment insurance and workers' compensation.
5. Not be a religious, lobbying, gambling, or marijuana-related organization.
6. Have at least one full-time employee.

If the project will serve a group of employers, the applicant must meet all application criteria and will serve as the eligible employer and fiscal agent in any funding agreement that results from this application.

The following factors will be considered by NOW when considering applications for funding:

- The characteristics of the workers to be trained and how their retention and/or advancement would benefit from the training.
- The relationship of the training to the competitiveness of the trainees and the employer.
- The quality of training.
- Whether the training will allow the participant(s) to gain industry-recognized training experience, lead to industry-recognized credentials and/ or an increase in wages;
- The number of participants the employer plans to train or retrain;
- The wage and benefit levels of participants before and after training;
- The existence of other training opportunities provided by the employer
- The occupation(s) for which incumbent worker training is being provided must be in demand;

Incumbent Worker Eligibility Criteria

An incumbent worker must be:

1. A U.S. citizen or otherwise legally entitled to work in the U.S.;
2. Age 18 or older;
3. Registered for the Selective Service (males who are 18 or older and born on or after January 1, 1960) unless an exception is justified;
4. Employed;
5. Meet the Fair Labor Standards Act requirements for an employer-employee relationship (<http://www.dol.gov/whd>); and
6. Have an established employment history with the employer for six (6) months or more.

If the IWT is being provided to a cohort of employees, not every employee in the cohort must have an established employment history with the employer for six months or more as long as a majority of those employees being trained do meet the employment history requirement. IWT participants may be required to complete registration with WorkSource Oregon, if eligible.

Types of Incumbent Worker Training

Incumbent worker training may be provided as classroom-based training, on-the-job training, apprenticeship or a combination of the above. Training may be provided by the company for which the incumbent worker(s) works, or reputable education or training vendors.

Applications for IWT programs should demonstrate the need for training, to include:

- Declining sales,
- Supply chain issues,
- Adverse industry market trends,
- Changes in management behavior or ownership,
- Phasing out of certain function(s) with the introduction of new function(s) that require worker retraining,
- Required skill changes that would otherwise require downsizing, layoffs, etc. if not addressed including, but not limited to:
 - Skill changes required by external economic or market forces
 - Significant changes in technology or operating processes
 - Rapidly changing industry or occupational job requirements
 - Emergence of new products
- New technology and/or equipment implementation,
- Creation of new employment opportunities that require advance skills and knowledge, or
- Other reason justified in the application and deemed appropriate by NOW.

Application and Award

Completed applications should be submitted to info@onwib.org. Funds will be awarded based on funds availability as well as need and appropriateness of training relevant to local industry priorities. At its discretion, NOW may use a competitive process with application deadlines to award resources and otherwise will allocate funds on a first-come first-serve basis while funds are available.

If awarded, employers will sign an IWT agreement, acknowledge receipt of Grievance & Complaint Procedures and EEO Notification and any other documents required by the fund source. Upon completion of the training, and prior to reimbursement, the employer will submit employee eligibility documentation (name, gender, SSN, date of birth, job title, wage for each trainee), certificates of completion and/or copies of the credentials for each trainee, and any other documents required by the fund source.

Due to varying funding source requirements, the Incumbent Worker Training may/may not be made on a reimbursement basis. In the case of reimbursement funding, the employer must pay for the training prior to asking for reimbursement from NOW. Reimbursements will be made to the employer within 60 days of receipt of a copy of the invoice and proof of payment for the training.

NOW may follow-up with employers receiving IWT funds for up to one year following the training end date to verify information regarding the employee(s) who received incumbent worker training, including employment status, wage information and job title.

**INCUMBENT WORKER TRAINING
APPLICATION FORM**

Name of Employer (applicant organization):	
Contact Name:	
Contact Job Title:	
Contact Phone Number:	
Contact Email:	
Company Physical Address:	
Mailing Address, if different:	
County:	<input type="checkbox"/> Benton <input type="checkbox"/> Clatsop <input type="checkbox"/> Columbia <input type="checkbox"/> Lincoln <input type="checkbox"/> Tillamook
Industry:	<input type="checkbox"/> Manufacturing <input type="checkbox"/> Healthcare <input type="checkbox"/> Leisure and Hospitality <input type="checkbox"/> Other:
Federal ID Number:	Date Established:
Number of Full-Time Workers:	Number of Part-Time Workers:
Has the company operated in Oregon for at least one year prior to the date of application? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Has the company relocated from another location resulting in layoffs in the preceding 120 days? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is the company current on all federal, state, and local tax obligations? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Does the company have an equal opportunity/non-discrimination policy in place? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is the company subject to a collective bargaining agreement? <input type="checkbox"/> Yes <input type="checkbox"/> No <i>If yes, and if union represented employees will be participating in the training activities of this program, it is required that consent be obtained from the representing union to collect the eligibility data from the employees PRIOR to funding approval.</i>	
Please provide a brief description of the business, product and/or service(s).	

Indicate the challenge(s) currently faced by the company that potential training would address:

- Declining sales,
- Supply chain issues,
- Adverse industry market trends,
- Changes in management behavior or ownership,
- Phasing out of certain function(s) with the introduction of new function(s) that require worker retraining,
- Required skill changes that would otherwise require downsizing, layoffs, etc. if not addressed including, but not limited to:
 - Skill changes required by external economic or market forces
 - Significant changes in technology or operating processes
 - Rapidly changing industry or occupational job requirements
 - Emergence of new products
- New technology and/or equipment implementation,
- Creation of new employment opportunities that require advance skills and knowledge, or
- Other reason justified in the application and deemed appropriate by NOW. Please explain:

Please describe the challenges that would be addressed by the proposed training.

How will this training make the employees more competitive in the economy and/or retain their employment?

How will the training make the company more competitive?

What is the potential for wage increases within one year of training?

Please describe the training, including training vendor, curriculum, hours of training, start and projected end date of training, number of employees to receive training, location of training delivery, method of training delivery, and whether the training will result in an industry recognized credential at the end of training (include name of credential, if applicable).


Training Budget

Category	Requested Funds	Employer Contribution
Non-company instructor or tuition costs		
Training-related rentals (tools, equipment, facilities, etc.)		
Training Materials and Supplies		
Other Costs (Describe)		
Travel/per diem for Instructor		
Trainee Wages	Not Paid For by NOW	
TOTALS		

Signature

Date

Attachment 4.5

	POLICY P15: WORK EXPERIENCE AND TRANSITIONAL JOBS
	APPROVED: 12/1/2020
	<input checked="" type="checkbox"/> NEW <input type="checkbox"/> REVISED

PURPOSE

The purpose of this policy is to provide guidance for the Northwest Oregon workforce area and establish the Northwest Oregon Works (NOW) standards regarding the development and implementation of transitional jobs and work experience activities under the WIOA Title I adult, dislocated worker and youth programs. This policy is established in accordance with the Workforce Innovation and Opportunity Act (WIOA) and applicable federal and state policies and guidance.

BACKGROUND

WIOA provides for a customer-centered, job-driven workforce system that is accessible to all job seekers. The adult, dislocated Worker, and youth programs provide career and training services in WorkSource Oregon, as a part of the nation's American Job Center network.

WIOA funding allows the delivery of services that prepare eligible individuals for education and employment opportunities, attainment of education and/or skills training credentials, and attainment of employment with career opportunities. To accomplish this, eligible participants must be assessed to determine skills, interests, needs, and personal goals in order to create an individual plan for each individual seeking WIOA services.

Work experience and transitional jobs are work-based learning activities designed to provide individuals with the work readiness skills or specific job skills necessary to attain or retain employment and enhance employability. Work experiences and transitional jobs are available to eligible adults and dislocated workers in accordance with this policy. Work experience activities are also mandatory elements of WIOA youth programs.

POLICY

A work experience is a planned, structured work-based learning experience that takes place in a workplace for limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act, exists. Funds provided for work experiences/transitional jobs may not be used directly or indirectly to displace workers by filling of a job opening that is vacant because the former occupant is on strike, or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage. WIOA funds may not be used to help employers to fill positions that promote or support the use, possession or distribution of marijuana or that support or promote gambling or religious activities.

Adults and Dislocated Workers

The goal of a work experience, including transitional jobs, for adults and dislocated workers is to establish a work history for the individual that demonstrates success in the workplace and develops the skills that lead to entry into, and retention in, unsubsidized employment. Service providers are responsible for determining appropriateness of work experience and transitional jobs services based on individual assessment, needs, barriers, and ability to benefit and succeed.

Transitional Jobs

Transitional jobs are wage-paid work experiences that are subsidized up to 100 percent. Like any work experience, transitional jobs can be in the public, private, or non-profit sectors. Up to ten (10) percent of combined adult and dislocated worker funds may be used to provide transitional jobs. Due to the limited funding available for transitional jobs, service providers are encouraged to work with employers who are willing to contribute a percentage of the cost for the transitional job. The employer reimbursement rate for transitional jobs is determined by NOW on a case-by-case basis and may be up to 100 percent, depending on funding availability. Although there is no assumption that the Individual will be retained in the transitional job after the work experience is over, retention is the preferred outcome.

Transitional Jobs are a type of work experience classified as an individualized career service under WIOA adult and dislocated worker programs. These jobs are designed to enable an individual to establish a work history, demonstrate work success in an employee-employer relationship, and develop the skills that lead to unsubsidized employment.

Transitional jobs are required to be combined with comprehensive career services and supportive services. Transitional jobs are only an alternative for standard work experience when addressing special populations including individuals with barriers to employment who are chronically unemployed or who have an inconsistent work history.

A chronically unemployed individual is defined as a worker who is unemployed and has been without work for 15 or more of the last 26 weeks. A person with inconsistent work history is defined as someone who, in the 12 months prior to WIOA registration, has lacked steady, full-time, permanent employment. This work history may include season work, temporary work, part-time work (less than 32 hours per week), or other periods of employment of less than ten consecutive weeks.

Barriers to employment may include, but are not limited to, criminal history, current or past recipients of Temporary Assistance for Needy Families (TANF) or Supplemental Nutrition Assistance Program (SNAP) benefits; individuals with disabilities; individuals experiencing/experienced homelessness, and individuals from underserved races or ethnicities as defined in labor market information.

Youth

Youth work experiences are planned, structured learning experiences that take place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act and state law. Work experiences provide youth participants with opportunities for career exploration and skill development.

Work experience for youth include summer employment opportunities and other employment opportunities throughout the year; pre-apprenticeship programs; internships; job shadowing (unpaid exposure to the workplace in

an occupational area of interest); and on-the-job training opportunities. Youth participants may participate in more than one work experience during the course of their WIOA program enrollment and all youth participants should have at least one work experience prior to program exit.

A minimum of 20 percent of local area youth funds must be spent on youth work experiences. Program expenditures may include wages/stipends, staff time spent identifying potential work experience opportunities, staff time working with employers to develop the work experience, staff time spent working with employers to ensure a successful work experience, staff time spent evaluating the work experience, participant work experience orientation sessions, classroom training or the required academic education component directly related to the work experience, and orientations for employers, incentive payments directly tied to the completion of work experience. Local area administrative funds are not subject to the twenty percent requirement; and leveraged resources cannot count toward the twenty percent. Supportive services do not count toward the work experience expenditure requirement even if supportive services assist the youth in participating in the work experience.

Worksite Agreements

All work experiences require written agreement between the employer and service provider that outlines the work experience/transitional job. The agreement is designed to establish assurances and conditions and ensure eligibility and compliance with applicable laws and guidance.

REFERENCES

The Workforce Innovation and Opportunity Act (WIOA) Section 134(d)(5) 20 CFR § 678.430

20 CFR § 680.150

20 CFR § 680.190

20 CFR § 680.195

20 CFR Preamble, Sections 680.190 and .195

20 CFR § 683.270

20 CFR § 680.840

20 CFR § 680.900

Training and Employment Guidance Letter (TEGL) No. 08-15

Training and Employment Guidance Letter (TEGL) No. 19-16

Attachment 6.1



BUDGET REVENUE ADDITIONS

Northwest Oregon Works received additional funding in the amount of \$1,440,173 from the date of the last annual budget approval in October of 2020. The funding streams are as follows:

- **Wildfire Disaster Recovery**

This grant was received from the state of Oregon HECC agency and ends September 2022. NOW was granted \$1,000,000 to assist areas along the coast affected by the summer wildfires. The state is contracting these funds to the applicable Workforce boards in three increments. The first increment amounted to \$333,333 with 10% administrative costs. As NOW and the other boards spend down these funds, the state will determine total percentage spent before dispersing the remaining two funding increments.

NOW will be focusing on areas impacted by the Echo Mountain Complex Fire in Clatsop, Tillamook, Benton and Lincoln Counties. NOW will identify dislocated workers to fill temporary employment positions to assist with clean up and rebuilding efforts and work with participants and business affected by the fire in training and long-term rebuilding strategies.

- **Healthy Oregon Workforce Training Opportunity (HOWTO)**

This grant was received from the state through the Oregon Health Authority agency and is for three-years ending December 2023. NOW was granted \$745,500 with 10% administrative costs

to alleviate the shortages in behavioral health workers in the region, along with promoting increased equity and diversity within the healthcare workforce.

The grant funds will be used to increase the number of trained peer support specialists, community health workers, medical assistants, certified health counselors, licensed social workers, and professional counselors in the region.

- **Youth Regional Reengagement**

This grant was received from the state through the Oregon Department of Education and is a six-month grant ending June 2021. NOW was granted \$290,000 with 15% administrative costs to reconnect youth in the region with education, training, and support.

The funds will serve youth within the Clatsop, Columbia, and Tillamook counties that are homeless, affected by poverty, and underserved due to race and ethnicities. NOW will hire or contract to ensure three full-time Student Success Coaches positions are created to locate, inform, and support participants.

- **WIOA Rapid Response Layoff Aversions**

This grant was received from the state of Oregon HECC agency with the intent to distribute the funds immediately. NOW was granted \$51,340 will all the funds being redistributed to businesses affected by the pandemic in the region.

NOW was able to process and issue financial support to a total 32 business within a span of three weeks.

- **Lincoln County CAREs**

NOW entered into a service agreement with Lincoln County to assist in the review, processing, and disbursement of over \$900,000 to assist small business within the county affected by the pandemic. NOW received \$15,000 in administrative funds to support fund disbursement to 220 companies.

- **Lincoln County (Emergency Echo Mtn. Fire)**

This grant was received from Lincoln County in the amount of \$5,000 to distribute the funds directly to fire survivors for goods and services.

BUDGET EXPENSE MODIFICATIONS

- NOW is moving \$10,000 from the travel budget into professional services since travel has significantly decreased due to the pandemic. NOW also entered into a contract with an IT company to cover all laptops and desktops at the center locations for NOW's contracted subrecipient personnel. In addition, NOW will be redeveloping its website in the next quarter.
- NOW renegotiated its facility costs with Oregon Coast Community College, as the current office space lease was no longer needed with NOW's employees working from home offices most of the time. NOW's monthly contract went from \$1,400 to \$400. NOW will leave the savings in the budgeted facilities line item until those available funds are reclassified for use as determined by management.

**NORTHWEST OREGON WORKS
BUDGET VS. ACTUAL
JULY 1, 2020 THROUGH DECEMBER 31, 2020**

Line #	RESOURCES	FUNDS AWARDED (PRIOR YR)	FUNDS AWARDED (CURRENT YR)	FUNDS DRAWN	AVAILABLE REMAINING BALANCE	REMAINING BALANCE %
FEDERAL FUNDING						
1	WIOA DISLOCATED WORKER	159,602	401,822	180,532	380,892	68%
2	WIOA YOUTH	-	526,650	211,357	315,293	60%
3	WIOA ADULT	53,921	434,775	161,423	327,273	67%
4	WIOA ADMINISTRATION	115,857	151,472	709	266,620	100%
5	WIOA DISASTER RECOVERY	172,405		86,652	85,753	50%
6	WIOA EMPLOYEE RECOVERY	-	176,985	37,434	139,551	79%
7	WIOA DISASTER RECOVERY WILDFIRES	-	333,333	-	333,333	100%
8	WIOA COVID MEDICAL ASSISTANCE	58,967	-	9,607	49,360	84%
9	WIOA RAPID RESPONSE LAYOFF AVERSION		51,340	51,340	-	0%
10	DHS SUMMER YOUTH EMPLOYMENT	28,818	-	8,867	19,951	69%
11	WIOA HIGH CONCENTRATION YOUTH	955	12,570	-	13,525	100%
STATE FUNDING						
12	HEALTHY OREGON WORKFORCE TRAINING	-	745,500	-	745,500	100%
13	COMPETITIVE STRATEGY	289,038	-	124,037	165,001	57%
14	YOUTH REGIONAL REENGAGEMENT		290,000	-	290,000	100%
15	TRAINING WORK EXPERIENCE	98,289	-	27,312	70,977	72%
16	INDUSTRY ENGAGEMENT	78,170	-	14,113	64,057	82%
17	UNRESTRICTED - GENERAL FUNDS	30,404	-	51	30,353	100%
LOCAL FUNDING						
18	FORD FAMILY FOUNDATION	50,000	-	50,000	-	0%
19	OREGON COASTAL ZONE MANAGEMENT	10,000	-	6,040	3,960	40%
20	LINCOLN COUNTY COMMISSIONERS	10,000	-	-	10,000	100%
21	SOUTHERN OREGON WORKFORCE BOARD	-	10,000	-	10,000	100%
22	COLUMBIA RIVER PUD TILLAMOOK	7,500	-	842	6,658	89%
23	PORT OF GARIBALDI	1,000	-	-	1,000	100%
24	LINCOLN COUNTY (CARES)	-	15,000	13,208	1,792	12%
25	LINCOLN COUNTY (EMERGENCY ECHO MTN. FIRE)	-	5,000	1,213	3,787	76%
OTHER FUNDING						
26	PAYMENT PROTECTION PLAN	-	79,697	79,697	-	0%
27	TOTAL AVAILABLE RESOURCES	1,164,926	3,234,144	1,064,434	3,334,636	76%

	BOARD EXPENSES	BUDGETED SPENDING	YTD SPENDING	REMAINING BALANCE AVAILABLE	REMAINING BALANCE PERCENTAGE	PERCENTAGE OF TOTAL FUNDS DRAWN	
	ADMINISTRATIVE STAFFING						
28	SALARIES	176,514	82,479	94,035	53%	8%	
29	TAXES & BENEFITS	70,053	25,287	44,766	64%	2%	
30	TOTAL ADMINISTRATIVE STAFFING	246,567	107,766	138,801	56%	10%	
	OPERATING EXPENSES						
31	STAFF & BOARD TRAVEL	6,500	1,104	5,396	83%	0.1%	
32	FACILITIES	17,530	8,510	9,020	51%	1%	
33	PROFESSIONAL SERVICES - BOARD	37,000	27,091	9,909	27%	3%	
34	TELEPHONE/COMMUNICATIONS	6,825	3,048	3,777	55%	0.3%	
35	AUDIT SERVICES	20,400	19,900	500	2%	2%	
36	FEES	7,320	3,213	4,107	56%	0.3%	
37	EQUIPMENT & MAINTENANCE	12,280	1,655	10,625	87%	0.2%	
38	SUPPLIES	5,200	2,010	3,190	61%	0.2%	
39	INSURANCE	5,300	2,346	2,954	56%	0%	
40	STAFF DEVELOPMENT	6,000	1,057	4,943	82%	0%	
41	MEMBERSHIPS	13,500	5,229	8,271	61%	0.5%	
42	COMMUNITY OUTREACH	-	-	-	-	0%	
43	TOTAL OPERATING EXPENSES	137,855	75,163	62,692	45%	7%	
	PROGRAM EXPENSES						
44	I-TRAC SOFTWARE	24,500	7,010	17,490	71%	0.7%	
45	WSO LEASES & MAINTENANCE	74,403	36,197	38,206	51%	3%	
46	PROGRAM OUTREACH	96,020	52,885	43,135	45%	5%	
47	PROFESSIONAL SERVICES	114,250	65,296	48,954	43%	6%	
48	SALARIES	165,149	85,847	79,302	48%	8%	
49	TAXES & BENEFITS	60,353	26,318	34,035	56%	2%	
50	TOTAL PROGRAM EXPENSES	534,675	273,553	261,122	49%	26%	
51	TOTAL BOARD EXPENSES	919,097	456,482	462,615	50%	43%	
		BUDGETED SPENDING	YTD SPENDING	REMAINING BALANCE AVAILABLE	REMAINING BALANCE PERCENTAGE	PERCENTAGE TO TOTAL FUNDS DRAWN	
	PROVIDER EXPENSES						
51	WIOA ADULT	310,000	134,630	175,370	57%	13%	
52	WIOA YOUTH	457,500	172,976	284,524	62%	16%	
53	WIOA DISLOCATED WORKER	378,500	150,128	228,372	60%	14%	
54	WIOA EMPLOYMENT RECOVERY	156,150	33,228	122,922	79%	3%	
55	WIOA DISASTER RECOVERY	151,745	70,094	81,651	54%	7%	
56	WIOA OMEP (ONE STOP OPERATOR)	24,450	7,803	16,647	68%	1%	
57	TRAINING WORK EXPERIENCE	93,664	24,223	69,441	74%	2%	
58	COVID MEDICAL RESPONSE	53,070	9,071	43,999	83%	1%	
59	SUMMER YOUTH EMPLOYMENT	24,027	5,799	18,228	76%	1%	
60	TOTAL PROVIDER EXPENSES	1,649,106	607,952	1,041,154	63%	57%	
61	GRAND TOTAL EXPENSES	2,568,203	1,064,434	1,503,769	59%	100%	
	YTD DIRECT PROGRAM COSTS BY COUNTY	CLATSOP	COLUMBIA	TILLAMOOK	LINCOLN	BENTON	TOTALS
	BOARD DIRECT PROGRAM COSTS	\$ 8,405	\$ 10,931	\$ 12,473	\$ 5,191	\$ 6,207	\$ 43,207.00
	SUB PROVIDER DIRECT PROGRAM COSTS	\$ 69,995	\$ 139,239	\$ 110,146	\$ 70,294	\$ 53,600	\$ 443,274.00
	TOTAL COSTS BY COUNTY	\$ 78,400	\$ 150,170	\$ 122,619	\$ 75,485	\$ 59,807	\$ 486,481.00
		16%	31%	25%	16%	12%	
	KEY						
	WIOA - Workforce Innovation and Opportunity Act						
	OMEP - Oregon Manufacturing Extension Partnership						
	DHS - Department of Human Services						
	WSO - Work Source Office						

Attachment 9.1

SERVICE	NOW TOTALS	BENTON	CLATSOP	COLUMBIA	LINCOLN (LC/NP)	TILLAMOOK
WIOA ADULTS AND DISLOCATED WORKERS						
A/DW Enrolled	122	21	8	20	4/19	50
<i>Training Services</i>						
➤ Skills-A/DW	36	9	5	3	3/10	6
➤ OJT-A/DW*	12	2	0	1	1/6	2
➤ Skills-ER	13	2	3	1	3	4
➤ OJT-ER	9	0	0	0	1	8
➤ Skills-TWI	8	5	0	0	1/1	1
➤ OJT-TWI	18	0	0	0	0	18
Credentials & Certs	20	6	6	7	0/1	0
<i>Employment</i>						
➤ A/DW Q1	37	4	5	5	0/5	18
➤ A/DW Q2	63	6	5	14	0/11	27
➤ A/DW Q3	25	5	4	4	0/5	7
➤ A/DW Q4	23	3	3	10	0/3	4
➤ DWG-DR	10	0	0	8	0	2
WIOA YOUTH						
<i>Youth Enrolled</i>						
➤ Active	41	7	6	26	0/1	1
➤ Follow Up	74	23	15	16	0/17	3
Career Services	15	2	1	12	0	0
<i>Training Services</i>						
➤ Secondary	7	1	0	6	0/0	0
➤ Skills	0	0	1	0	0/0	0
➤ Work Based	13	4	0	8	0/0	1
<i>Follow Up Services</i>						
➤ Career Related	24	17	3	4	0/0	0
➤ Post-Secondary	25	0	0	24	0/0	1
➤ Supportive	5	1	0	3	0/2	0
Degrees/Credentials	7	2	2	2	0/1	0
<i>Employment and Education</i>						
➤ Placed	17	5	2	7	0/1	2
➤ Retained	31	5	6	15	0/2	3

Each row includes unduplicated participant counts for activities STARTED this year and reported cumulatively as of the date of the report.

*The October report reflected higher numbers which were duplicates of other fund streams. This number is now reported for A/DW funds only.

Revised: January 12, 2020

Attachment 9.2

Strategy	0%	25%	50%	75%	100%
INVEST					
Focus on data to prioritize investments.					
Optimize the return on investment through sound resource management.					
Increase resources for workforce development in the local area.					
INNOVATE					
Pursue promising practices and programs that can be scaled up.					
Develop strategic partnerships in support of workforce initiatives.					
Lead efforts that result in employment and career advancement.					
IMPACT					
Mobilize opportunities that support critical industry sectors.					
Foster development of career pathways for youth and adults.					
Educate communities about the workforce services available.					

	ON TRACK		SOMEWHAT LAGGING		NEEDING TRACTION
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INVEST

- Applied for and obtained wildfire disaster relief grant
- Applied for and obtained Oregon Health Authority Grant for behavioral health pipeline
- Applied for and obtained Youth Development Division grant for youth reengagement
- Applied for and obtained County funds to assist wildfire victims with transportation and food

INNOVATE

- Implemented policy to assist service providers in mobilizing additional supports to customers including transitional jobs, needs related payments and adult stipends.
- Expanding contracted service delivery to include Community Services Consortium.
- Obtaining equipment to address connectivity barriers for remote customers.
- Exploring expansion of work crew models for youth due to COVID impacts.

IMPACT

- Meeting with healthcare industry to further support medical assistant pipeline and working with Willamette Workforce Partnership to serve common business customers in this sector.
- Working with Oregon Manufacturing Innovation Center to partner in supporting manufacturing sector.
- Supporting growth and expansion of INSEAM Program to other areas in Oregon.