



**AGENDA**  
**BOARD OF DIRECTORS**  
**& CONSORTIUM**

The Sunset Building  
4077 SW Research Way  
Corvallis, OR 97333

**OCTOBER 25, 2019 - 10:00am-2:00pm**

This meeting has been properly noticed and posted in the following places:

Columbia County Commissioners Office: 230 Strand Street 331, St. Helens, OR 97051  
Clatsop County Commissioners Office: 800 Exchange Street, Ste. 410, Astoria, OR 97103  
Tillamook County Commissioners office: 201 Laurel Ave., Tillamook, OR 97141  
Lincoln County Commissioners Office: 225 West Olive Street Room 110, Newport, Oregon 97365  
Benton County Commissioners Office: 205 NW 5th Street, Corvallis, OR 97330  
Columbia County: The Chronicle  
Clatsop County: The Daily Astorian  
Lincoln County: The News Guard  
Tillamook County: Headlight Herald  
Benton County: Gazette Times-Corvallis

This Agenda is also available at [www.nworegonworks.org](http://www.nworegonworks.org).

Telephone: +1 646 876 9923  
Meeting ID: 837 226 679  
Computer: <https://zoom.us/j/837226679>

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

**2. REVIEW and APPROVE AGENDA**

*Inclusion of any emergency items, or deletion of any items*

**3. PUBLIC COMMENT SESSION**

*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.*

**4. DISCUSSION and POSSIBLE ACTION**

Accept Staff's recommendation to approve the Minutes of the August 23, Board Meeting.  
Accept Staff's recommendation to approve the Minutes of the August 16, 2019 Consortium Meeting.

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

Accept Staff's recommendation to approve the PY2019-20 Annual Budget revisions (5 minutes) – Board then Consortium

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

Accept Staff's recommendation to approve the PY2019-20 first quarter Budget to Actual (5 minutes) – Board then Consortium

7. **DISCUSSION and POSSIBLE ACTION** – Debra Smith, NOW Program Manager  
Accept Staff’s recommendation to approve the Rapid Response Policy (5 minutes)
8. **STRATEGIC PLANNING DISCUSSION**  
Introductions and Agenda Summary (15 minutes)
9. **STRATEGIC PLANNING DISCUSSION**  
Review and Discussion of Mission (15 minutes)
10. **STRATEGIC PLANNING DISCUSSION**  
Sector Discussion (45 minutes)
- 11:45 – BREAK FOR LUNCH** (30 minutes)
11. **STRATEGIC PLANNING DISCUSSION**  
Goal Setting (45 minutes)
12. **STRATEGIC PLANNING DISCUSSION**  
Performance Reporting (50 minutes)
13. **STRATEGIC PLANNING DISCUSSION**  
Next Steps (10 minutes)
14. **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](mailto:Emily@onwib.org). . TTY is available at 711 or (800) 735-2900.*



# MINUTES

## **NORTHWEST OREGON WORKS BOARD OF DIRECTORS MEETING**

August 23, 2019 10:00 a.m. - 12:00 p.m.

Columbia River Receptions & Events at Meriwether Place  
1070 Columbia Blvd.  
St. Helens, OR 97051

**Present:**

**Board:** **Tony Erickson**, Oregon AERO, Chair; **Stephanie Hurliman**, Oregon Employment Dept.; **Bryan Campbell**, DHS, VocRehab; **John Hawkins**, Service Employees International Union; **Rod Belisle**, NECA-IBEW Electrical Training Center; **Terre Cooper**, Tillamook County Economic Development; **Amanda Morris**, Samaritan Health Service; **Cami Aufdermauer**, Tillamook County Habitat for Humanity

**Consortium:** **Doug Hunt**, Lincoln County Commissioner

**Conference Call-In:** **Whitey Forsman**, Pacific Oyster; **Zach Poole**, Pig' n Pancake, Vice Chair/Secretary; **Josh Kvidt**, Alyrica; **Linda Dugan**, Linda Dugan Insurance, Treasurer; **Heather Clark**, Alterations by Heather

**Excused:** **Todd Simmons**, Tillamook Peoples' Utility District; **Ivan Castille**, Laborers Local 737; **Ann Buchele**, Linn-Benton Community College; **Henry Balensifer III**, LEKTRO; **Birgitte Ryslinge**, Oregon Coast Community College; **Sara Skamser**, Foulweather Trawl

**Staff:** **Heather DeSart**; NOW Executive Director; **Debra Smith**; NOW Program Manager; **Emily Schwartz**; NOW Office Manager

**Guests:** **Shawna Sykes**, Oregon Employment Department; **Erik Knoder** Oregon Employment Department; **Jon Irvine**, Workforce Liaison; **Camille Padilla**, ResCare, Call-in; **Angeline Chan-Pepper**, ResCare; **Diana Nish**, ResCare; **ResCare youth**, Fay Smith; **Wendy Sperberg**, Advanced Textile Sewing Instructor; **Chris Breitmeyer**, Clatsop Community College, President; **Marc Goldberg**, Portland Community College, Associate Vice President-Workforce Development and Continuing Education; **Dr. Chris Villa**, Portland Community College, Rock Creek Campus President; **Chuck Daughtry**, Columbia County Economic Team, Executive Director; **Andrew Lattanner**, OMIC Training Center, Director



**1. CALL TO ORDER, CONFIRMATION OF POSTING, AND ROLL CALL**

*Chairman Erickson called the Meeting to order at 10:03am.*

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

**2. AGENDA REVIEW**

*(Inclusion of any emergency items, or deletion of any items)*

Correction of item 8 typo.

**MOTION: John Hawkins      SECOND: Rod Belisle      MOTION CARRIED.**

**3. SECOND PUBLIC COMMENT SESSION**

*There were no comments from the public.*

**4. DISCUSSION and POSSIBLE ACTION**

*Approve Minutes of the June 28, 2019 Board Meeting.*

**MOTION: John Hawkins      SECOND: Rod Belisle      MOTION CARRIED.**

**5. DISCUSSION and POSSIBLE ACTION**

Rod Belisle - Financial Advisory Team recommendation to approve report and update of the Travel Policy from the August 13, 2019 meeting.

*Cami Aufdermauer questioned the cost of the audit. Rod Belisle explained that the types of things that are being audited, and the secondary businesses involved raises the price.*

*Rod Belisle explained the changes in the Travel Policy.*

*Heather DeSart announced that in the upcoming October meeting, Jason would be presenting changes to the budget that were discussed previously.*

**MOTION: John Hawkins      SECOND: Stephanie Hurliman      MOTION CARRIED.**

**6. DISCUSSION and POSSIBLE ACTION**

Meeting frequency – *Board voted to keep meeting frequency to five meetings per year.*

**MOTION: John Hawkins      SECOND: Rod Belisle      MOTION CARRIED.**

**7. INFORMATION**



Oregon Employment Department gave an Economic Update for the five-county region, focusing on Columbia County – Shawna Sykes and Erick Knoder

**8. INFORMATION**

ResCare-Program Success Stories – Diana Nish and Angeline Chan Pepper brought in two Success Story videos to present. The first video was too quiet to hear, so only the second video of Fay Smith, who attended the Industrial Sewing class, was presented.

*Commissioner Hunt wanted to know how ResCare identifies and nurtures participants' talents.*

*Angeline and Diana explained the test that participants take to help identify areas in which they could work and would enjoy.*

**9. INFORMATION**

The State of Clatsop Community College was presented by the college President, Chris Breitmeyer. The presentation focused on the maritime program.

*Commissioner Hunt thanked Chris Breitmeyer and Kristen Wilkin for their work with maritime.*

**10. INFORMATION**

The State of Economic Development in Clatsop County was presented by Chris Breitmeyer for Kevin Leahy who was unable to attend. A handout was provided to the Board for an in-depth update on Clatsop Economic Development Resources (CEDR)

**11. INFORMATION**

The State of Portland Community College was presented by Marc Goldberg, PCC's Associate Vice President-Workforce Development and Continuing Education, and Dr. Chris Villa, PCC's Rock Creek Campus President. The presentation focused on PCC's Rock Creek Campus and the OMIC Training Center that will be coming in Fall 2020. Andrew Lattanner, the new OMIC Training Center Director was introduced.

**12. INFORMATION**

The State of Economic Development in Columbia County was presented by Chuck Daughtry, Columbia County Economic Team's Executive Director. Presented on the "Keep it Local Initiative," OMIC and tourism.

**13. BOARD CHAIR REPORT**

Chairman Erickson mentioned that Manufacturing Day would be coming up on October 4<sup>th</sup>. The rest of the report focused on a new nonprofit in Columbia County that assisted inmates about to be released get training for workforce.



Commissioner Hunt announced that the Consortium is trying to meet with Karen Humelbaugh to find out why the Board's funding got cut.

**14. EXECUTIVE DIRECTOR'S REPORT**

Heather DeSart announced Sara Skamser will be retiring, and the board will need to appoint a new business representative from Lincoln County to replace her.

Heather announced that the Consortium would like more performance review. Let the Board know that she will be asking what they would like to see at the next meeting in October.

**15. BOARD MEMBER COMMENTS**

*There were no Board Member comments.*

**16. SECOND PUBLIC COMMENT SECTION**

*Jon Irvine, the new Workforce Liaison for Oregon AFL-CIO, introduced himself to the board.*

**17. ADJOURN**

Chair Erickson adjourned the meeting at 12:11 p.m.



# MINUTES

## CONSORTIUM MEETING LOCAL ELECTED OFFICIALS

Tillamook County Library  
1716 3<sup>rd</sup> St.  
Tillamook, OR 97141

Friday, August 16, 2019  
10:00 AM - 1:00 PM

**This meeting has been properly noticed and posted in the following places:**

Columbia County Commissioners office: 230 Strand Street 331, St. Helens, OR 97051  
Clatsop County Commissioners office: 800 Exchange Street, Ste. 410, Astoria, OR 97103  
Tillamook County Commissioners office: 201 Laurel Ave., Tillamook, OR 97141  
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Benton County Commissioners office: 205 NW 5th Street, Corvallis, OR 97330  
Columbia County: The Chronicle                      Clatsop County: The Daily Astorian  
Lincoln County: The News Guard                      Tillamook County: Headlight Herald  
Benton County: Gazette Times-Corvallis

These Minutes are also available at [www.nworegonworks.org](http://www.nworegonworks.org).

Phone: 1 646 876 9923; Meeting ID: 922 087 198  
Computer: <https://zoom.us/j/922087198>

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*Those wishing to speak should sign the "Public Comment" sign-in sheet*

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

**STAFF:** Heather DeSart, NOW Executive Director; Emily Schwartz, NOW Office Manager

**CALL IN:** Debra Smith, NOW Program Manager

**GUESTS:** Karen Litvin, Project Masters Director

**MEETING LOCATION WAS MOVED TO THE COMMISSIONERS MEETING ROOM IN THE TILLAMOOK COUNTY JUSTICE COURT, 201 LAUREL AVE, TILLAMOOK, OR 97141**



## 1. CALL TO ORDER, CONFIRMATION of POSTING and ROLL CALL

The meeting was called to order at 10:37 AM. Posting Confirmed and Roll Call taken by Emily Schwartz and Quorum achieved.

## 2. REVIEW and APPROVE AGENDA

No Changes were made to the Agenda.

MOTION: MARY FAITH BELL      SECOND: HENRY HEIMULLER      MOTION CARRIED.

## 3. PUBLIC COMMENT SESSION

There were no comments from the Public.

## 4. DISCUSSION and POSSIBLE ACTION

Approve Meeting Minutes from the June 28, 2019 Meeting.

MOTION: PAT MALONE      SECOND: MARY FAITH BELL      MOTION CARRIED.

## 5. INFORMATION: Karen Litvin gave a background on how WorkSource came to be what it is in Oregon, and what the roles of the Consortium are. Commissioners are the ones who designate the entity who expends the funds on the Commissioners behalf.

Gave background on the roles of the local board.

Commissioner Hunt asked for more information on WorkSource.

- *WorkSource Oregon is what Oregon has branded for the One Stop Delivery System that is required under WIOA. This is where all services that are required under the federally mandated law are delivered. Local boards only administer Title I services through these centers while other entities deliver different services, however local boards are supposed to be the convener of all these other entities.*

Commissioner Malone asked for a list of the basic partners involved in local boards.

- *Local boards have private business, which is 51% mandatory majority from local sectors. Organized labor 20% requirement, education and training (community colleges), Vocational Rehabilitation, community-based organizations (Heather DeSart noted that Cami Aufdermauer from Habitat for Humanity is this rep. for the NOW Board) are other required partners.*
- *Heather DeSart and Emily Schwartz identified who on the board represent which required partner.*
- *Karen Litvin explained that if you add someone from one sector, you would have to add another person to keep the percentages required under federal law.*
- *Commissioner Hunt: NOW has tried to keep the board at a minimum because otherwise the size would potentially diminish the effectiveness of the board. NOW has also tried to keep a balanced geographic representation as members resign and are elected.*
- *Karen Litvin explained what a comprehensive center was and all the partners and services that must be offered in the center to be considered comprehensive. Heather DeSart explained that local boards*





are required to identify at least one comprehensive center in their local area and that Astoria was designated as NOW's.

- Karen Litvin explained that NOW has the smallest allocation of funding for WIOA but the most community college partners and the same amount of WorkSource centers as Portland Metro who have a much larger WIOA allocation. There are thirteen components that a board must do, regardless of allocation of funds. Because of NOW's allocation, there is more work with less resources.
- WorkSource Oregon came up with set standards that made it so customers would get consistent service and treatment no matter which center they went to. The standards also included sectors that are not required under law but are part of best practices. NOW has three sectors: Advanced Textile Manufacturing, Maritime, and Healthcare.

Commissioner Bell asked who determines the sectors and if they are the main focus for NOW's five counties.

- Karen Litvin explained the sectors are determined by the local boards in the local planning process. Under the law, the local board is required to come up with a Local Plan which identifies sectors and other mandatory elements. The Local Plan is updated every four years and sectors are determined by local area data, job placements, and employer willingness, then deciding which sectors are most essential to the local economic vitality.

Commissioner Hunt asked for a background on how NOW's three sectors came to be.

- Heather DeSart explained the identification of NOW's sectors. Advanced Textile Manufacturing was identified through the Board Chair, Tony Erikson. Maritime took shape in the Lincoln County Commissioners office during a meeting with Terry Thompson and NOW's coastal counterparts. Healthcare was a common theme across Oregon local board because of the consistent need in healthcare services. Explained that NOW's initiative has started to get traction.
- Commissioner Malone pointed out that getting a project for one of the sectors started can take years.
- Commissioner Heimuller mentioned that it's important to revisit which sectors are in the local plan as local economic conditions change.

Karen Litvin explained the difference between the Consortium Board and the Local Board as well as the role of the Consortium Board.

- Commissioner Hunt explained that if a Commissioner is present at a Local Board meeting, they do not have voting authority.
- Karen Litvin explained that the law requires the Consortium Board to have a CLEO (Chief Local Elected Official) that was elected by the board of local elected officials. The terms of the CLEO were outlined in the Intergovernmental Agreement.
- Consortium must approve of the Local Plan before it goes to the State Board and the Governor's office.
- Heather DeSart explained that the reason NOW has been having Strategic Planning sessions is because the new Local Plan is due in June 2020.
- Consortium must review the Local Boards audits.

#### SHORT BREAK

**INFORMATION:** Karen Litvin continued to explain the difference between the Consortium Board and the Local Board as well as the role of the Consortium Board and Local Board.

- While it wasn't specified in the slide that was shown, it is a role of the Consortium Board to review the Local Board's budget.
- Essentially everything regarding the one stop centers, the Local Board has authority.

Commissioner Wev wanted to know if there was an online option for getting WorkSource services.



- Karen Litvin explained that WorkSource Oregon does have online options for job seekers and employers.
- Heather explained that Stephanie Hurliman from OED (who sits on NOW's board) was in the process of purchasing technology to give the option of remote services and workshops.

Commissioner Wev brought up the point of the state's criteria for allocating money.

- Commissioner Hunt explained that Karen Humelbaugh has not been willing to provide the details about how it's allocated and that he has a phone meeting with her to cover this, as well as other, issues. Commissioners expressed concern for why the state was unwilling to provide the information.
- Karen Litvin explained that there are federal regulations to allocation requirements, but that the state can add whatever other requirements that they want.
- Commissioner Heimuller wanted to know if it would be good to send a letter to our Senators asking them to intervene. Commissioner Hunt spoke with Representative Gomberg who felt that he and Senator Johnson would be comfortable requesting that information. Commissioner Hunt will work on drafting a letter to give to Representative Gomberg and Senator Johnson at the Coastal Caucus.

Commissioner Bell was concerned with the structure of the two boards and how the Consortium Board gives oversight to the Local Board with the separation of roles between them.

- Commissioner Heimuller explained that there is a budget review that the Consortium is responsible for. The Consortium is also able to attend and participate in Local Board meetings, just without the ability to vote on items. He also explained that there are other instances where federal money flows down to local areas, and the feds require governmental oversight.
- Commissioner Malone mentioned that it was difficult to provide oversight over the budget when the Consortium meets as infrequently as it had.
- Heather DeSart reminded the Commissioners that the new meeting calendar for the program year was approved in June, and the Consortium meetings following regular Board meetings were marked with an asterisk.

Commissioner Bell asked how performance was being reviewed.

- Heather DeSart stated that NOW usually brings performance information to the regular Board meeting, but Debra Smith had been in training, so it hadn't been presented recently. Stated that it would be brought to the August Board meeting.
- Commissioner Heimuller wanted to know if there was something that measured performance across the state to see how NOW was performing compared to other Boards.
- Karen Litvin explained that some more proactive ways of measuring how a Local Board was doing was through committees.
- Commissioner Wev wanted to know what ResCare does. Karen Litvin explained that they are NOW's sub provider and case managers who are the ones to deliver the services under Title I to Adult, Dislocated Worker, and Youth.
- Commissioner Bell wanted to know if there was a way to get a committee together to measure performance regularly. Karen Litvin said that before anything was decided, this topic should be brought up with the Local Board first. Commissioner Hunt said that other Commissioners should put together what they wanted and send it to Heather DeSart or Emily Schwartz so it could be brought up to the Local Board.

Commissioner Hunt wanted to know if the other Commissioners felt that it would be helpful to have another one of these training meetings in the near future, or if they wanted to wait until the October meeting for their next discussion.

- Commissioners decided that they would wait for the next planned meeting in October. Commissioner Malone stated that while more meetings aren't necessarily wanted, he would like to maintain momentum of the Consortium Board.



Commissioner Hunt stated that there were starting to be talks with Karen Humelbaugh about NOW merging with their counterpart SOWIB (Southwest Oregon Workforce Investment Board) for a coastal WIB.

- Commissioner Heimuller suggested that merging may create a size issue and that there should be a current focus on trying to meet Benton County's needs.
- Karen Litvin stated that the process for counties petitioning to leave their local area has already been triggered, so if Benton wants to leave, the state process has already started.

Commissioner Wev stated that she is concerned about NOW's focused sectors and why the logging sector was not included.

- Heather DeSart explained that the board will be reevaluating the sectors for the local plan this program year.

Commissioner Malone wanted to know why three counties worked under TOC/OWA but not now.

- Karen Litvin explained that the laws were different under WIA, so when WIOA came about in 2014, the states were required to adjust local areas accordingly.

Commissioner Hunt stated that he would be getting a letter to the other Commissioners on Monday, August 19, for approval to give to Representative Gomberg and Senator Johnson at the Coastal Caucus.

## **6. SECOND PUBLIC COMMENT SESSION**

There were no comments from the Public.

## **7. ADJOURN**

The meeting was adjourned at 1:59 pm.

*Northwest Oregon Works meetings are open to the public and will 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 [info@onwib.org](mailto:info@onwib.org). TTY is available at 711 or (800) 735-2900.*



## Northwest Oregon Works

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3788 SE High School Drive • Post Office Box 140 Lincoln City, Oregon 97367  
(541) 264-4033 • FAX (541) 648-5282

[www.nworegonworks.org](http://www.nworegonworks.org)

Fiscal Year 2019-2020

### BUDGET

Budget Available --- June 18, 2019

Budget Board & Consortium Meeting --- October 25, 2019

Treasury Officer  
Linda Dugan  
[linda@duganins.com](mailto:linda@duganins.com)

**NOTE:** DRAFT VERSION

## **BUDGET**

Northwest Oregon Works (NOW) was formed on July 1, 2015, as a 501(c)(3) nonprofit corporation organized in the state of Oregon. The organization services a five-county area in Northwest Oregon including Benton, Clatsop, Columbia, Lincoln, and Tillamook Counties. As a workforce development organization dedicated to assisting employers in recruiting and retaining employees, and helping individuals find employment, NOW budgets, on an annual basis, the financial support required to accomplish the specific goals and the overriding mission of the organization.

### **Major Variances from Previous Year Budget with Upcoming Year**

NOW's major funding flows into the organization from Workforce Innovation Opportunity Act (WIOA) pass-through federal dollars on behalf of the state of Oregon. These funds comprise 75-80 percent of NOW's overall funding. NOW has received PY19-20 allocations from the state that is comprised of a 13% decrease from the previous years' WIOA funding. This amounted to a \$210,000 total WIOA decrease in funding, and when compared to NOW's first year of funding in PY15-16, the overall decrease is at 35%.

NOW also receives additional WIOA Dislocated Worker funds that the state of Oregon releases after a three-year hold back term. The state can hold back up to 25% of the total federal WIOA funds received allocating out funds not used after the third year. Typically, NOW will receive these additional funds ranging from \$90,000 - \$115,000 during November or December within the program year. However, NOW is noting that the amount of these funds may be significantly less since some of the state's holdback funds were used to lessen the effects of layoffs within the state of Oregon. This will equate to a greater percent decrease for NOW within the PY19-20 year as the total amount of these funds released will be significantly less. These funds were not included in the budget since no reasonable estimated amount could be determined.

### **Detailed Budget**

The narrative of this budget provides specificity and context to revenues and expenditures. As a nonprofit organization, NOW does not have the typical proprietary and fiduciary funds within this budget such as general, capital project, and debt service funds. NOW functions as a pass-through entity where funds are received and filter through to funding partners that provide the services in accordance to NOW's mission purpose. Detailed support for the revenue and expenditure categories within NOW's proposed budget can be obtained upon request with NOW's Treasurer, ED or CFO.

### **Operating Expenditures**

NOW incurs various operating infrastructure costs such as audits, wages, benefits, leases, utilities etc. These operating costs are paid with WIOA administration funds and other state funds set aside to assist the workforce board in covering these costs. NOW's administrative operating costs are estimated at 18% of the total PY19-20 forecasted expenditures.

### **Program Internal Expenditures**

NOW directly pays for expenditures related to program objectives. Examples of these costs are rent and utilities for the workforce centers in the five counties, professional services for tailored county programs, IT programs and program wages and benefit costs. NOW's program expenditures are estimated at 20% of forecasted expenditures. The projected PY19-20 programs and initiatives are as follows:

- Instructor for targeted youth
- Industry manufacturing collaboration events
- Industry textile instructor
- Industry maritime
- Industry healthcare initiative

### **Program External Expenditures**

NOW contracts with various companies or organizations that provide the necessary services required to achieve NOW's program objectives and mission purposes. These service providers directly invoice NOW for incurred approved costs and receive reimbursement on a monthly basis. NOW's service provider expenditures are estimated at 62% of forecasted expenditures. The projected PY19-20 subrecipient services and initiatives are as follows:

- WIOA adult, youth and dislocated workers
- Work experience
- Summer youth

**KEY:**

**NOW FUNDING STREAMS**

**Department of Labor (DOL)<sup>1</sup> funds:**

- Workforce Investment Opportunity Act (WIOA) ADMIN funds are used for internal operation/infrastructure expenditures.
- WIOA ADULT funds are used for OJT's (On-the Job-Training), ITA's (Individual Training Accounts), and Work Experience for adults aged 18 and up.
- WIOA YOUTH funds are used for youth aged 16-24 (out-of-school youth) and 16-21 (in-school-youth).
- WIOA DISLOCATED WORKER (DW) funds are used for OJT's (On-the-Job Training), ITA's (Individual Training Accounts), and Work Experience for dislocated workers, aged 18 or older and meeting specific criteria.
- WIOA HIGH CONCENTRATION OF YOUTH FUNDS (HCY) funds are used to provide additional assistance to local areas that have high concentrations of eligible youth.

**Department of Human Services (DHS)<sup>2</sup> funds:**

- SUMMER YOUTH EDUCATION PROGRAM (SYEP) funds are used to provide teen parents or non-parenting teens of Temporary Assistance for Needy Families (TANF) recipients with paid work experience.

**Higher Education Coordinating Commission (HECC)<sup>3</sup> funds:**

- Board Support Competitive Strategies (CS) funds is to provide financial resources to the grantee to assist with general costs of running a LWDB (Local Workforce Development Board).
- Industry Engagement (IE) funds are used to provide financial resources to NOW to assist in industry engagement efforts through support and maintenance of sector partnerships.
- Work Experience (WEX) funds are used to provide resources to assist NOW in coordinating and supporting training and work experience activities for eligible participants.
- Unrestricted General funding is used to cover any expenditures deemed necessary by the Local Workforce Development Board.

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<sup>1</sup> The Department of Labor (DOL) is a federal agency that oversees Workforce Innovation Opportunity Act (WIOA) funds.

<sup>2</sup> The Department of Human Services (DHS) is Oregon's principal agency for helping Oregonians achieve wellbeing and independence through opportunities that protect, empower, respect choice and preserve dignity.

<sup>3</sup> The Higher Education Coordinating Commission (HECC) works to help Oregonians benefit from the transformational power of high-quality postsecondary education and training.

**Oregon Department of Education<sup>4</sup> funds:**

- Youth Development Council (YDC) funds are used to enable youth ages 16-24 who face barriers to education and the workforce get back on the path to high school graduation, college, and/or career.

**Lincoln County and Economic Development funds:**

- Hospitality funds are used for the purpose of helping to fund the Lincoln County Hospitality Workforce Training.

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<sup>4</sup> The Oregon Department of Education fosters equity and excellence for every learner through collaboration with educators, partners and communities.



**NOW Annual Operating Budget**

**Program Year 19-20**


**Updated 10-08-2019**

		PY19-20		PY18-19 □		PY17-18 □	
<u>Line #</u>		<u>Carryover/ Awarded</u>	<u>%</u>	<u>Carryover/ Awarded</u>	<u>%</u>	<u>Carryover/ Awarded</u>	<u>%</u>
<b>Federal Funding</b>							
1	DOL WIOA Admin (Prior Year Carryover)	169,891	7%	155,411	5%	165,767	6%
2	DOL WIOA Adult (Prior Year Carryover)	83,438	3%	48,194	2%	117,873	4%
3	DOL WIOA Youth (Prior Year Carryover)	102,343	4%	80,374	3%	187,505	6%
4	DOL WIOA DW (Prior Year Carryover)	136,063	6%	69,609	2%	108,388	4%
5	DOL WIOA HCY (Prior Year Carryover)	15,337	1%	50,635	2%	17,620	1%
6	DOL RJS (Prior Year Carryover)	-	-	-	-	40,037	1%
7	DOL WIOA Admin (Awarded)	137,577	6%	169,891	6%	161,414	5%
8	DOL WIOA Adult (Awarded)	356,351	15%	451,844	16%	431,308	15%
9	DOL WIOA Youth (Awarded)	441,440	18%	543,591	19%	465,564	16%
10	DOL WIOA DW (Awarded)	440,400	18%	533,584	19%	559,614	19%
11	DOL WIOA HCY (Awarded)	-	-	16,700	1%	50,635	2%
12	DHS SYEP (Awarded)	37,207	2%	6,508	0.2%	65,052	2%
13	DOL Veterans SD (Awarded)	-	-	19,200	1%	24,095	0.8%
<b>State Funding</b>							
14	HECC Board Support CS (Prior Year Carryover)	106,148	4%	101,828	4%	81,584	3%
15	HECC Industry Engagement (Prior Year Carryover)	19,380	1%	62,629	2%	-	-
16	HECC Work Experience (Prior Year Carryover)	-	-	82,791	3%	-	-
17	HECC Unrestricted General (Prior Year Carryover)	30,812	1%	30,572	1%	23,137	1%
18	OED Youth Development (Prior Year Carryover)	-	-	82,309	3%	-	-
19	HECC Work Experience * (Awarded)	85,715	4%	82,791	3%	82,791	3%
20	HECC Industry Engagement* (Awarded)	62,500	3%	62,629	2%	62,629	2%
21	HECC Board Support C/S * (Awarded)	187,098	8%	162,097	6%	162,097	6%
22	HECC Unrestricted General (Awarded)	-	-	500	0.0%	8,219	0.3%
23	OED Youth Development (Awarded)	-	-	-	-	100,000	3%
<b>Local Funding</b>							
24	Hospitality Economic (Prior Year Carryover)	2,126	0.1%	7,663	0.3%	-	-
25	Ford Family (Prior Year Carryover)	-	-	10,000	0.0%	-	-
26	Hospitality Economic (Awarded)	-	-	-	-	15,000	1%
27	Ford Family (Awarded)	-	-	-	-	10,000	0.3%
28	<b>TOTAL FUNDING</b>	<b>2,413,826</b>	<b>100%</b>	<b>2,831,350</b>	<b>100%</b>	<b>2,940,329</b>	<b>100%</b>



NORTHWEST OREGON WORKS						
BUDGET VS. ACTUAL						
JULY 1, 2019 THROUGH SEPTEMBER 30, 2019						
Line #	RESOURCES	BUDGETED RESOURCES AVAILABLE	FUNDS DRAWN/ RECEIVED	REMAINING BALANCE	REMAINING BALANCE %	
<b>FEDERAL FUNDING</b>						
1	WIOA Admin (Prior Year Carryover)	169,891	34,774	135,117	80%	
2	WIOA Adult (Prior Year Carryover)	83,438	83,438	-	0%	
3	WIOA Youth (Prior Year Carryover)	102,343	102,343	-	0%	
4	WIOA DW (Prior Year Carryover)	136,063	136,063	-	0%	
5	WIOA HCY (Prior Year Carryover)	15,337	9,410	5,927	39%	
6	WIOA Admin (Current Year Allocation)	137,577	-	137,577	100%	
7	WIOA Adult (Current Year Allocation)	356,351	-	356,351	100%	
8	WIOA Youth (Current Year Allocation)	441,440	-	441,440	100%	
9	WIOA DW (Current Year Allocation)	440,400	-	440,400	100%	
10	DHS Summer Youth Employment Program	37,207	1,486	35,721	96%	
<b>STATE FUNDING</b>						
11	Work Experience *	85,715	4,999	80,716	94%	
12	Competitive Strategy **	293,246	45,143	248,103	85%	
13	Industry Engagement **	81,880	3,242	78,638	96%	
14	Unrestricted - General Funds revenue	30,812	50	30,762	100%	
<b>LOCAL FUNDING</b>						
15	Hospitality and Economic Development	2,126	-	2,126	100%	
16	<b>TOTAL AVAILABLE RESOURCES</b>	<b>2,413,826</b>	<b>420,948</b>	<b>1,992,878</b>	<b>83%</b>	
<b>BOARD EXPENSES</b>						
<b>Admin Staffing</b>						
17	Salaries	170,382	41,939	128,443	75%	10.0%
18	Taxes & Benefits	66,611	12,705	53,906	81%	3.0%
19	<b>Total Staffing</b>	<b>236,993</b>	<b>54,644</b>	<b>182,349</b>	<b>77%</b>	<b>13.0%</b>
<b>Operating Expenses</b>						
20	Staff & Board Travel	25,700	7,414	18,286	71%	1.8%
21	Facilities	16,096	3,946	12,150	75%	0.9%
22	Professional Services - Board	19,000	3,118	15,882	84%	0.7%
23	Telephone/Communications	7,000	2,036	4,964	71%	0.5%
24	Audit Services	19,300	-	19,300	100%	0.0%
25	Fees/Taxes	6,400	1,219	5,181	81%	0.3%
26	Equipment & Maintenance	3,500	432	3,068	88%	0.1%
27	Supplies	3,500	458	3,042	87%	0.1%
28	Insurance	5,790	1,173	4,617	80%	0.3%
29	Staff Development	8,000	1,225	6,775	85%	0.3%
30	Memberships	14,000	1,180	12,820	92%	0.3%
31	Community Outreach	-	50	(50)	-	0.0%
32	<b>Total Operating Expenses</b>	<b>128,286</b>	<b>22,251</b>	<b>106,035</b>	<b>83%</b>	<b>5.3%</b>
<b>Program Expenses</b>						
33	I-Trac	19,305	2,620	16,685	86%	0.6%
34	WSO Leases & Maintenance	79,800	18,960	60,840	76%	4.5%
35	Program Outreach	13,426	-	13,426	100%	0.0%
36	Professional Services	45,400	2,537	42,863	94%	0.6%
37	Salaries	186,311	45,433	140,878	76%	10.8%
38	Taxes & Benefits	62,018	12,207	49,811	80%	2.9%
39	<b>Total Program Expenses</b>	<b>406,260</b>	<b>81,757</b>	<b>324,503</b>	<b>80%</b>	<b>19.4%</b>
40	<b>TOTAL BOARD EXPENSES</b>	<b>771,539</b>	<b>158,652</b>	<b>612,887</b>	<b>79%</b>	<b>37.7%</b>



	<b>POLICY P09: RAPID RESPONSE AND LAYOFF ASSISTANCE</b>
	<b>APPROVED: 10/25/2019 – NOW</b>
	<input type="checkbox"/> NEW <input checked="" type="checkbox"/> REVISED

Rapid Response exists to assist workers and businesses throughout the inevitable periods of economic transitions that will occur throughout the business cycle.

**Rapid Response Goal:** to prevent layoffs when possible, limit their impact on workers, should they occur, and help dislocated workers transition to new employment as quickly as possible. It is meant to be innovative, flexible, responsive, and timely.

- To implement the board’s layoff aversion plan, a comprehensive approach requiring the integration of data, relationships, partnerships, and policies and procedures to allow an assessment of the economic situation that exists within the *Northwest Oregon Works* area.
- To provide a Rapid Response system that is proactive, data-driven, engaged with businesses, and focused on preventing layoffs or minimizing their negative impacts.
- To provide employers and dislocated workers Rapid Response Services in alignment with the Quality Rapid Response Principles.
- To build proactive rapid response partnerships working together to lessen the impact of layoffs
- To work toward fewer people filing for UI benefits and claimants filing for fewer weeks.
- To facilitate solutions by meeting customer needs through relationships with service providers, other government agencies, and other public and private entities.

WIOA, the Workforce Innovation and Opportunity Act and the state requires Rapid Response Infrastructure and Protocols in place to meet Rapid Response and Layoff Aversion goals. Oregon has designated local workforce development boards to have Rapid Response Infrastructure and Protocols in place to build a local Rapid Response and Layoff Aversion system, deliver Rapid Response services and to designate board staff to be the Dislocated Worker Liaison. In turn, the Northwest Oregon Works DW Liaison leads the implementation of the infrastructure and protocols.

The Northwest Oregon Works Rapid Response Infrastructure is made up of two teams serving the five counties of the Northwest Oregon Workforce area. The Northern Region consists of Tillamook, Clatsop and Columbia Counties; the Southern Region consists of Lincoln and Benton Counties. Each area team is represented by a Rapid Response Coordinator and/or designated representative responsible for coordinating the Rapid Response activities when directed by the dislocated worker liaison.

**Northwest Oregon Works Rapid Response Services:**

1. Are guided by WIOA, the Higher Education Coordinating Commission (HECC) Office of Workforce Investments (OWI), the Oregon Dislocated Worker Unit (DWU) policies and guidance, and Northwest Oregon Works policies.

2. Follow the
  - Northwest Oregon Works Rapid Response Roles and Responsibilities (Attachment A)
  - Northwest Oregon Works Rapid Response Process (Attachment B)
  - Northwest Oregon Works Layoff Aversion Strategies (Attachment C)
  - WIOA and State guidance (<https://www.oregon.gov/highered/institutions-programs/workforce/Pages/dislocated-worker-partner-resources.aspx>)
3. The Rapid Response Team connects with partners who work daily with local employers and who are aware of when employers are struggling and need layoff aversion resources such as: adapting to a changing economy, staying in business and/or retaining employees. Local partners consist of the five-county Economic Development Directors and Coordinators of the Small Business Development Centers. Relationships are being developed continually with business leaders from local community groups such as Rotary Club and Chambers of Commerce in all five counties. State partners include Business Oregon and State Regional Solutions members.
4. Builds relationships and has the materials ready before they are needed for the Rapid Response Information Sessions. Materials to address layoff aversion and Rapid Response are kept and maintained by Rapid Response Coordinators who are housed in our Work Source Centers. Frontline Staff in the Centers are trained and hand out materials as appropriate.

Attachments:

- A - Rapid Response Roles and Responsibilities
- B - Rapid Response Process
- C - Layoff Aversion Strategy
- D –Rapid Response Flow Chart
- E - Rapid Response Initial Contact Sheet
- F - Rapid Response Employer Contact Sheet
- G - Rapid Response Worker Survey

References:

- WIOA Secs. 133(a)(2) and 134(a)(2)(A)
- TEGL 19-16 (sections 18 and 20)
- HECC/OWI - Rapid Response – Doing the Job Revised and Rapid Response Framework Revised
- Oregon Dislocated Worker Unit Resources <https://www.oregon.gov/highered/institutions-programs/workforce/Pages/dislocated-worker-partner-resources.aspx>