



**Executive Committee Agenda**

**December 8, 2020 from 8:30am-9:30am**

Zoom or Call in ONLY- 1-408-638-0968

Meeting URL: <https://us02web.zoom.us/j/82298780566>

Meeting ID: 822 9878 0566

Topic	Lead	Time	Description
Consent Agenda	Gary	8:30am	<ul style="list-style-type: none"> <li>Ex Com minutes from November 10, 2020- <i>vote required</i></li> </ul>
			Motion:
Budget Modification #1	Jamie/Heather	8:40am	<ul style="list-style-type: none"> <li>Solicit Review and Approval of Modified Budget- <i>vote required</i></li> </ul>
			Motion:
Private Sector Recruitment	Heather	8:55am	<ul style="list-style-type: none"> <li>Executive Committee roles in private sector board member recruitment</li> </ul>
			Action:
Local Plan Update	Heather/Jessica	9:05am	<ul style="list-style-type: none"> <li>Solicit input regarding local plan review timeline</li> <li>Overview key components that have evolved</li> </ul>
			Action:
Legislative Concept	Heather	9:15am	<ul style="list-style-type: none"> <li>Overview of upcoming legislative session/advocacy</li> </ul>
			Action:
Round Robin Discussion	All	9:25am	<ul style="list-style-type: none"> <li>General Updates from Group</li> </ul>
			Actions:
<p>Attachments:</p> <ul style="list-style-type: none"> <li>November 10, 2020- Executive Committee Meeting Minutes</li> <li>Budget Modification #1</li> <li>Local Plan Template</li> </ul>			



**Executive Committee Agenda**

**November 10, 2020 from 8:30am-9:30am**

Zoom or Call in ONLY- 1-408-638-0968; Meeting ID 899 1621 2807

<https://us02web.zoom.us/j/89916212807>

**Attendees:** Gary North, Dr. Cronin, Julie Matthews, Jennifer Newby, Staff: Heather Ficht, Jamie Kendellen, Jessica Fitzpatrick, Melissa Barrett, Stefanie Siebold.

*Gary called meeting to order at 8:31am.*

Topic	Lead	Time	Description
Consent Agenda	Gary	8:30am	<ul style="list-style-type: none"> <li>Ex Com minutes from October 13, 2020- <i>vote required</i></li> </ul>
			<p>Motion: Julie moves to accept the minutes as presented, Marta seconds, unanimously approved</p>
Debrief Board Meeting	Heather/Stef	8:40am	<ul style="list-style-type: none"> <li>Debrief Board Meeting Discussion</li> <li>Clarify Strategy for Outreach and Recruitment of New Members</li> <li>Board Buddies- Expectations around making connections</li> </ul>
			<p>Actions: Recommendations were made for Heather to reach out to Tria Gould at Google in the Gorge, Red Rock BioFuels in the Basin, Mark Wendt in Klamath, and Maggie Hubble from Shift in Central for potential board membership. Marta will be sending an outreach email to intro to Heather and Tria.</p>
			<p>Update the recruitment materials before we send them out to the group for new outreach- Jessica and Heather.</p> <p>Group discussed board buddies and desire to have the process be random. The more engagement with each other industries the better. Allows folks to get a cross section of differing perspectives outside of their own industries.</p> <p>We will continue to discuss in the future, including using surveys to gather ideas, and</p>

			leaning on our new Biz Srvs Program Manager for leading the work.
Unaudited Financials	Jamie	9:10am	<ul style="list-style-type: none"> <li>Review and approve unaudited financials- <i>vote required</i></li> </ul>
			<p>Discussion: Jamie presented the unaudited financials, focusing on key areas: PPP spending is on track and will be spent-out without issue. We are underspent in Sectors, mainly due to the COVID shutdowns and limited and changing engagement with industry groups, so will be looking to reprioritize spending those funds. We have received additional funds to support YCC , as well as a \$1million grant from HOWTO to support the Behavioral Health Consortium, both reflected in the budget. Within the HowTo Grant is the hiring of 2 new staff members, which is reflected here, as is the previously approved staff member on the program team. There are no other changes or issues to point out.</p> <p>Heather also noted that our team and our providers are doing more than their share to ensure that funds are appropriately spent out and may be asked to take on additional funding as a result.</p> <p>Motion: Julie moved to approve the financials as presented, Jennifer seconded, unanimously approved.</p>
Round Robin Discussion	All	9:20am	<ul style="list-style-type: none"> <li>General Updates from Group</li> </ul>
			<p>Discussion: Heather added that after the presentation that she did for OR Business Council, the state WTDB asked her to join a sub-committee of the state board to evaluate the state workforce. The governor is also interested in</p>

		<p>participating. There will be six meetings before winter break.</p> <p>Julie Matthews updated that KR Telecomm is coming to K Falls and creating 20 – 25 jobs in the downtown. Referred to recent press releases for more information. Love’s is also coming to build a truck stop right off hwy 97 providing another 20 jobs.</p> <p>Marta said there is much progress in construction at CGCC. Weather permitting it will be done by July.</p> <p>Heather asked Jenni Newby if there was any progress or news related to the Department of Corrections decision related to terminating the CC contracts for adult basic education services in state prisons. Jenni indicated that we are waiting for information, but not optimistic that ABE will continue in the prisons. Strict guidelines that all community colleges have to comply with.</p> <p>Gary said not much has changed in construction in the last month or so. There has been a lot that has been put on hold, but he is hopeful that projects will start to ramp up again. Lumber market has come down. Appliances and import items where factories shut down, have seen material price increases trickle down. Tariffs that are currently in place may be eased in the future with the new administration.</p>
<p>Attachments:</p> <ul style="list-style-type: none"> <li>• October 13, 2020- Executive Committee Meeting Minutes</li> <li>• Unaudited Financials</li> </ul>		

*Meeting adjourned at 9:28am*

EC Works BUDGET 2020 - 2021 MOD2

11.17.20 rev

RESOURCES	2020 - 2021 Budgeted MOD2	2020 - 2021 Budgeted MOD1	Variance	
<b>Carry In Resources</b>				
Adult	388,121	388,121	-	
Dislocated Worker	487,651	399,011	88,640	
Youth	418,288	418,288	-	
WIOA Admin	261,189	261,189	-	
WIOA - Future Ready	57,457	57,457	-	
DOL - American Apprenticeship Initiative	33,632	33,632	(0)	
DOL - Apprenti	87,861	87,861	-	
DOL - DWG Disaster & Employment	584,591	584,591	0	
DOL/State - WTDB COVID Response	78,775	78,775	-	
State - TWIP	161,684	161,684	-	
State - Industry Engagement (Sectors)	138,756	138,756	-	
State - Competitiveness Strategies (Board Supp)	104,640	104,640	-	
Local - COHC Health Careers	68,776	68,776	-	
Local - Facebook	83,672	83,672	-	
Local - YCC (Tykeson)	50,000	50,000	-	
	<u>3,005,093</u>	<u>2,916,453</u>	<u>88,640</u>	
<b>Current Year Resources</b>				
Adult	1,087,272	1,087,272	-	
Dislocated Worker	845,299	845,299	-	
Youth	1,149,809	1,149,809	-	
WIOA Admin	342,486	342,486	-	
WIOA - High Concentration of Eligible Youth	11,250	11,250	-	
Federal - Paycheck Protection Program	111,350	111,350	-	
Federal/State - TANF Summer Jobs	220,000	220,000	-	
State - GED Wraparound	42,900	42,900	-	
State/Local - HowTo	1,000,000	-	1,000,000	
Local - YCC (BLPD, Redmond SD)	70,000	-	70,000	
County - Lake County	14,500	14,500	-	
	<u>4,894,866</u>	<u>3,824,866</u>	<u>1,070,000</u>	
<b>Total Resources</b>	<b><u>7,899,959</u></b>	<b><u>6,741,319</u></b>	<b><u>1,158,640</u></b>	17.19%
<b>EXPENDITURES</b>				
<b>Board Expenses</b>				
<b>Staffing</b>				
Salaries	658,959	583,649	75,310	
Employer Taxes	65,896	58,365	7,531	
Employee Benefits	185,827	157,585	28,242	
<b>Total Staffing</b>	<u>910,682</u>	<u>799,599</u>	<u>111,083</u>	13.89%
<b>Operating Expenses</b>				
Professional Services	40,000	60,000	(20,000)	
Legal Services	4,500	1,500	3,000	
Audit Services	18,746	18,746	-	
Fees/Taxes	8,500	8,500	-	
Phone & Internet	16,500	13,500	3,000	
Insurance	12,000	10,000	2,000	
Facilities	36,000	31,000	5,000	
Office Supplies/Expenses	20,000	13,000	7,000	
Memberships	13,500	13,500	-	
Printing	2,600	2,600	-	
Postage	300	300	-	
Staff/Board Travel	20,000	15,000	5,000	
Meetings	5,000	5,000	-	
Staff Development	11,500	10,000	1,500	
<b>Total Operating Expenses</b>	<u>209,146</u>	<u>202,646</u>	<u>6,500</u>	3.21%
<b>Board expense as % of revenue</b>	<b>14%</b>			
<b>Program Expenses</b>				
ITrac Database	38,510	38,510	-	
WSO Expenses - Leases, Phone/Int, Technology, etc...	42,580	42,580	-	
One Stop Operator	29,289	29,289	-	
Program General Expenses ***	1,116,148	885,648	230,500	
<b>Total Program Expenses</b>	<u>1,226,527</u>	<u>996,027</u>	<u>230,500</u>	23.14%
<b>Total Board Expenses</b>	<b>2,346,355</b>	<b>1,998,272</b>	<b>348,083</b>	17.42%

\*\*\* See attached schedule of 2020-2021 budgeted Program General Expenses

**EC Works BUDGET 2020 - 2021**

	<b>2020 - 2021 Budgeted MOD2</b>	<b>2020 - 2021 Budgeted MOD1</b>	<b>Variance</b>	
<b>Program Provider Contracts</b>				
Adult	850,000	850,000	-	0.0%
Dislocated Worker	860,000	860,000	-	0.0%
Youth	1,000,000	1,000,000	-	0.0%
20/21 TANF Summer Jobs	193,600	193,600	-	
DOL DWGs	460,138	460,138	-	
TWIP	147,383	147,383	-	0.0%
Future Ready	35,670	35,670	0	
DOL Apprenti	76,158	76,158	-	
GED Wraparound	42,900	42,900	-	
Lake County - WSO Center	10,000	10,000	-	0.0%
<b>Total Program Provider Contracts</b>	<b>3,675,850</b>	<b>3,675,850</b>	<b>0</b>	<b>0.00%</b>
<b>Contingency Fund</b>	<b>10,000</b>	<b>10,000</b>	<b>-</b>	<b>0.00%</b>
<b>Total EC Works Expenses</b>	<b>6,032,205</b>	<b>5,684,122</b>	<b>348,084</b>	<b>6.12%</b>
<b>Fiscal Year 2021-2022 Quarter 1 Resources</b>	<b>1,867,753</b>	<b>1,057,197</b>	<b>810,556</b>	<b>76.67%</b>
<b>Targeted Carry In 3 Months</b>	<b>1,196,205</b>			

	<b>2020 - 2021 Budgeted MOD2</b>	<b>2019 - 2020 Final</b>	<b>Variance</b>	
<b>Program Provider Contracts</b>				
Adult	850,000	654,910	195,090	29.8%
Dislocated Worker	860,000	646,713	213,287	33.0%
Youth	1,000,000	767,171	232,829	30.3%
20/21 TANF Summer Jobs	193,600	119,963	73,637	61.4%
DOL DWGs	460,138	69,286	390,852	564.1%
TWIP	147,383	110,034	37,349	33.9%
Future Ready	35,670	35,530	140	0.4%
DOL Apprenti	76,158	44,842	31,316	69.8%
DOL IQor	-	282,139	(282,139)	-100.0%
GED Wraparound	42,900	15,816	27,084	171.2%
Lake County - WSO Center	10,000	13,597	(3,597)	-26.5%
<b>Total Program Provider Contracts</b>	<b>3,675,850</b>	<b>2,760,001</b>	<b>915,849</b>	<b>33.2%</b>
<b>Historical - Program Provider Contracts</b>				
		<b>2016 - 2017 = \$2,911,261</b>		
		<b>2017 - 2018 = \$2,339,259</b>		
		<b>2018 - 2019 = \$2,733,464</b>		
		<b>2019 - 2020 = \$2,760,001</b>		

Program General Exp account tracking  
acct # 8185

	Adult	DW	Youth	Sectors	Facebook	HowTo	YCC
Target Populations	10,000.00	10,000.00	10,000.00				
YCC Data System			24,000.00				
Sponsorships	2,500.00	2,500.00	2,500.00				
Field Training (Super LLT \$6k)	4,000.00		2,000.00				
Sectors Projects - contract out Sectors	34,636.25	34,636.25	30,727.50				
EDCO				5,000.00			
EDCO/REDI				2,500.00			
COHC & Match - COCC				77,551.57			
Erika McCalpine DEI / OSU DEI	3,333.00	3,333.00	3,334.00				
Ranemaker Institute	9,466.00		4,734.00				
COCC - WTDB C N A & Nurse Assistant							
Future Ready							
COCC							
Warm Springs WIOA Program							
Crook County School District					83,671.75		
Incumbent Worker	75,000.00						
Abilitree	2,903.33						
NeighborImpact	15,860.94						
The Tofurky Company	20,385.85						
Housing Works	10,438.83						
Aperion Management	5,000.00						
Cascade Comprehensive Care	8,415.00						
Project Orange - cohort	30,000.00						
Project Waterfall - KCEDA Econ Dev - cohort	15,000.00						
Google				6,000.00			
Language Translation Services	3,333.00	3,333.00	3,334.00				
YCC			50,000.00				120,000.00
Youth Initiative - Hold - do not yet contract			140,000.00				
WorkSource Branding	4,000.00						
COIC - computers	3,000.00	3,000.00					
HowTo - Direct Expenses						39,500.00	
Layoff Aversion		88,640.00					
Reserve for Future Projects	6,666.00		3,334.00				
Balance	263,938.20	145,442.25	273,963.50	91,051.57	83,671.75	39,500.00	120,000.00

Program General Exp account tracking  
acct # 8185

	Other/State			Totals
	WTDB Covid	Funds	Future Ready	
Target Populations				30,000.00
YCC Data System				24,000.00
Sponsorships				7,500.00
Field Training (Super LLT \$6k)				6,000.00
Sectors Projects - contract out Sectors				100,000.00
EDCO				5,000.00
EDCO/REDI				2,500.00
COHC & Match - COCC				77,551.57
Erika McCalpine DEI / OSU DEI		6500		16,500.00
Ranemaker Institute				14,200.00
COCC - WTDB C N A & Nurse Assistant	70,000.00			70,000.00
Future Ready				-
COCC			16,040.00	16,040.00
Warm Springs WIOA Program			4,681.01	4,681.01
Crook County School District				83,671.75
Incumbent Worker				75,000.00
Abilitree				2,903.33
NeighborImpact				15,860.94
The Tofurky Company				20,385.85
Housing Works				10,438.83
Aperion Management				5,000.00
Cascade Comprehensive Care				8,415.00
Project Orange - cohort				30,000.00
Project Waterfall - KCEDA Econ Dev - cohort				15,000.00
Google				6,000.00
Language Translation Services				10,000.00
YCC				170,000.00
Youth Initiative - Hold - do not yet contract				140,000.00
WorkSource Branding				4,000.00
COIC - computers				6,000.00
HowTo - Direct Expenses				39,500.00
Layoff Aversion		1,360.00		90,000.00
Reserve for Future Projects				10,000.00
Balance	70,000.00	7,860.00	20,721.01	<b>\$ 1,116,148.28</b>

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**- REVISED October 2020\* -**

# **Workforce Innovation and Opportunity Act**

## **Local Plan**

**[INSERT LOCAL AREA NAME]**

Submitted by

**[INSERT LOCAL BOARD NAME]**

July 1, 2020 – June 30, 2024

[\*Revised content appears in red font]

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## Section 1: Workforce and Economic Analysis

Please answer the questions in Section 1 in **five (5) pages or less**. The Oregon Employment Department's Workforce and Economic Research Division has a regional economist and workforce analyst stationed in each of the nine local areas. These experts can assist in developing responses to the questions 1.1 through 1.3 below.

**Please briefly address any available economic analysis that focuses on expectations for the COVID and post-COVID economy.**

**Please limit the inclusion of tables and charts to those that are critical to your analysis.**

1.1 An analysis of the economic conditions including existing and emerging in-demand industry sectors and occupations; and the employment needs of employers in those industry sectors and occupations. [WIOA Sec. 108(b)(1)(A)]

[Click here to enter text.](#)

1.2 An analysis of the knowledge and skills required to meet the employment needs of the employers in the local area, including employment requirements for in-demand industry sectors and occupations. [WIOA Sec. 108(b)(1)(B)]

[Click here to enter text.](#)

1.3 An analysis of the local workforce, including current labor force employment (and unemployment) data, and information on labor market trends, and the educational and skill levels of the workforce in the region, including individuals with barriers to employment. [WIOA Sec. 108(b)(1)(C)]

[Click here to enter text.](#)

1.4 An analysis and description of adult and dislocated worker workforce development activities, including type and availability of education, training and employment activities. Include analysis of the strengths and weaknesses of such services, and the capacity to provide such services, in order to address the needs identified in 1.2. [WIOA Sec. 108(b)(1)(D) & 108 (b)(7)]

[Click here to enter text.](#)

1.5 An analysis and description of youth workforce activities, including activities for youth with disabilities. Identify successful models and best practices, for youth workforce activities relevant to the local area. [WIOA Sec. 108(b)(9)]

[Click here to enter text.](#)

## Section 2: Strategic Vision and Goals

Please answer the questions in Section 2 in **six (6) pages or less**. Section 2 responses should be greatly influenced by the members of the local workforce development board and other community stakeholders.

**Include how your vision, goals, and strategic planning process may respond to significant changes in your local area due to major events (e.g., the COVID pandemic, etc.).**

2.1 Provide the board’s vision and goals for its local workforce system in preparing an educated and skilled workforce in the local area, including goals for youth and individuals with barriers to employment. [WIOA Sec. 108(b)(1)(E)]

[Click here to enter text.](#)

2.2 Describe how the board’s vision and goals align with and/or supports the vision of the Oregon Workforce and Talent Development Board (WTDB):

The WTDB approved their [2020-2021 Strategic Plan](#) in September 2019.

**Vision**

Equitable Prosperity for All Oregonians

**Mission**

Advance Oregon through meaningful work, training, and education by empowering people and employers

[Click here to enter text.](#)

2.3 Describe how the board’s goals, strategies, programs, and projects align with and will contribute to achieving the WTDB’s Imperatives, Objectives, and Initiatives summarized below:

- Advancing equity and inclusion and connecting all of Oregon’s communities (tribal, rural, urban, and others);
- Working collaboratively and expanding workforce system partnerships, especially public-private partnerships;
- Acting on bold and innovative strategies that are focused on results;
- Aligning workforce system programs and services and investments;
- Increasing awareness, access, and utilization of workforce system programs and services;
- Understanding the true wages required for self-sufficiency and advocating solutions that address gaps;
- Increasing problem-solving and critical thinking skills in students, youth, and adults;
- Creating and recognizing industry-driven credentials of value including essential employability skills; and
- Increasing progress toward achieving Oregon’s Adult Attainment Goal.

[Click here to enter text.](#)

2.4 Describe board actions to become and/or remain a high-performing board. These include, but are not limited to four categories with accompanying indicators, based on national best practices and characteristics of high performing local boards. See Local Plan References and Resources. [WIOA Sec. 108(b)(18)]

- Data-driven Decision-making
  - The Board is positioned as the “go to” source for labor market information among community partners.
  - The Board utilizes the labor market intelligence provided by regional economists for decision making.
- Strategy
  - The Board monitors and updates a strategic plan.
  - The Board frames board meetings around strategic initiatives and utilizes a consent agenda.
- Partnerships and Investments
  - The Board collaborates regularly with core partners and organizations beyond the core partners.
  - The Board is business-driven and uses a sector-based approach to engaging local employers.
- Programs
  - The Board promotes efforts to enhance provision of services to individuals with barriers to employment.
  - The Board has established policies, processes, criteria for issuing individual training accounts that aligns with its identified goals, strategies, and targeted industries.

[Click here to enter text.](#)

2.5 Describe how the board’s goals relate to the achievement of federal performance accountability measures. [WIOA Sec. 108(b)(1)(E)]

[Click here to enter text.](#)

### Section 3: Local Area Partnerships and Investment Strategies

Please answer the questions in Section 3 in **four (4) pages or less**. Many of the responses below, such as targeted sector strategies, should be based on strategic discussions with the local board and partners.

**Include how your partnerships and investment strategies may change/respond to significant changes in your local area due to major events (e.g., the COVID pandemic, etc.).**

3.1 Taking into account the analysis in Section 1, describe the local board's strategy to work with the organizations that carry out core programs to align resources in the local area, in support of the vision and goals described in Question 2.1. See Local Plan References and Resources. [WIOA Sec. 108(b)(1)(F)]

[Click here to enter text.](#)

3.2 Identify the programs/partners that are included in the local workforce development system. Include, at a minimum, organizations that provide services for Adult Education and Literacy, Wagner-Peyser, Vocational Rehabilitation, Temporary Assistance for Needy Families, Supplemental Nutritional Assistance Program, and programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006. See Local Plan References and Resources. [WIOA Sec. 108(b)(2)]

[Click here to enter text.](#)

3.3 Describe efforts to work with partners identified in 3.2 to support alignment of service provision to contribute to the achievement of WTDB's goals and strategies. See Local Plan References and Resources. [WIOA Sec. 108(b)(2)]

[Click here to enter text.](#)

3.4 Describe strategies to implement the WorkSource Oregon Operational Standards, maximizing coordination of services provided by Oregon Employment Department and the local board's contracted service providers in order to improve services and avoid duplication. See Local Plan References and Resources. [WIOA Sec. 108(b)(12)]

[Click here to enter text.](#)

3.5 Identify how the local board will carry out a review of local applications submitted under WIOA Title II Adult Education and Literacy, consistent with the local plan and state provided criteria. See Local Plan References and Resources. [WIOA Sec. 108(b)(13)]

[Click here to enter text.](#)

3.6 Describe efforts to support and/or promote entrepreneurial skills training and microenterprise services, in coordination with economic development and other partners. [WIOA Sec. 108(b)(5)]

[Click here to enter text.](#)

3.7 Describe how the local board coordinates education and workforce investment activities with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services. [WIOA Sec. 108(b)(10)]

[Click here to enter text.](#)

3.8 Describe efforts to coordinate supportive services provided through workforce investment activities in the local area, including facilitating transportation for customers. [WIOA Sec. 108(b)(11)]

[Click here to enter text.](#)

3.9 Based on the analysis described in Section 1.1-1.3, identify the populations that the local area plans to focus its efforts and resources on, also known as targeted populations.

[Click here to enter text.](#)

3.10 Based on the analysis described Section 1, identify all industries where a sector partnership(s) is currently being convened in the local area or there will be an attempt to convene a sector partnership and the timeframe. Identify whether or not the Next Gen model is being used for each sector partnership. If the Next Gen model is not being used, describe why it is not being used.

[Click here to enter text.](#)

3.11 Based on the analysis described Section 1, describe the local investment strategy toward targeted sectors strategies identified in 3.10 and targeted populations identified in 3.9.

[Click here to enter text.](#)

3.12 Identify and describe the strategies and services that are and/or will be used to:

- A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs in addition to targeted sector strategies
- B. Support a local workforce development system described in 3.2 that meets the needs of businesses
- C. Better coordinate workforce development programs with economic development partners and programs
- D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs

This may include the implementation of incumbent worker training programs, on-the-job training programs, work-based learning programs, apprenticeship models, customized training programs, or utilization of

effective business intermediaries and other business services and strategies that support the local board's strategy in 3.1.  
[WIOA Sec. 108(b)(4)(A&B)]

[Click here to enter text.](#)

3.13 Does the local board currently leverage or have oversight of funding outside of WIOA Title I funding and state general funds to support the local workforce development system? Briefly describe the funding and how it will impact the local system. If the local board does not currently have oversight of additional funding, does it have future plans to pursue them?

[Click here to enter text.](#)



## Section 4: Program Design and Evaluation

Please answer the following questions in Section 4 in **five (5) pages or less**. Many of the responses below, such as career pathways and individual training accounts, should be based on strategic discussions with the local board and partners.

**Include how your program design may change in response to recent major events (e.g., the COVID pandemic, etc.) in your local area.**

4.1 Describe how the local board, working with the entities carrying out core programs, will expand access to employment, training, education, and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. [WIOA Sec. 108(b)(3)]

[Click here to enter text.](#)

4.2 Describe how the local board will facilitate the development of career pathways, consistent with the Career Pathways Definitions. See Local Plan References and Resources. [WIOA Sec. 108(b)(3)]

[Click here to enter text.](#)

4.3 Describe how the local board will utilize co-enrollment, as appropriate, in core programs to maximize efficiencies and use of resources. [WIOA Sec. 108(b)(3)]

[Click here to enter text.](#)

4.4 Describe one-stop delivery system in the local area, consistent with the One-Stop Center Definitions including:

- A. The local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, through the system and ensure that such providers meet the employment needs of local employers, and workers and jobseekers. [WIOA Sec. 108(b)(6)(A)]

[Click here to enter text.](#)

- B. How the local board will facilitate access to services provided through the one-stop delivery system in remote areas, through the use of technology, and through other means. [WIOA Sec. 108(b)(6)(B)]

[Click here to enter text.](#)

- C. How entities within the one-stop delivery system, including one-stop operators and the one-stop partners, will comply with WIOA section 188, if applicable, and applicable provisions of the Americans

with Disabilities Act of 1990 regarding the physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities, including providing staff training and support for addressing the needs of individuals with disabilities. See Local Plan References and Resources. [WIOA Sec. 108(b)(6)(C)]

[Click here to enter text.](#)

D. Describe the roles and resource contributions of the one-stop partners by providing a summary of the area's memorandum of understanding (and resource sharing agreements, if such documents are used). [WIOA Sec. 108(b)(6)(D)]

[Click here to enter text.](#)

E. Describe how one-stop centers are implementing and transitioning to an integrated technology-enabled intake and case management information system for core programs and programs carried out by one-stop partners [WIOA Sec. 108(b)(21)]

[Click here to enter text.](#)

4.5 Consistent with the Guidance Letter on Minimum Training Expenditures, describe how the board plans to implement the occupational skill development expenditure minimum.

Clearly state whether the local board will:

A. Expend a minimum 25% of WIOA funding under the local board's direct control on occupational skill development.

OR

B. Use an alternative formula that includes other income beyond WIOA funding to meet the minimum 25% expenditure minimum. Provide a description of other income it would like to include in calculating the expenditure minimum.

[Click here to enter text.](#)

4.6 Describe the policy, process, and criteria for issuing individual training accounts (ITAs) including any limitations on ITA amounts. [WIOA Sec. 108(b)(19)]

[Click here to enter text.](#)

4.7 If training contracts are used, describe processes utilized by the local board to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided. See Local Plan References and Resources. [WIOA Sec. 108(b)(19)]

[Click here to enter text.](#)

4.8 Describe process utilized by the local board to ensure that training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate. [WIOA Sec. 134(c)(3)(G)(iii)]

[Click here to enter text.](#)

4.9 Describe how rapid response activities are coordinated and carried out in the local area. See Local Plan References and Resources. [WIOA Sec. 108(b)(8)]

[Click here to enter text.](#)

4.10 Describe the design framework for youth programs utilized by the local board, and how the required 14 program elements are to be made available within that framework.

[Click here to enter text.](#)

## Section 5: Compliance

Please answer the questions in Section 5 in **ten (10) pages or less**. Most of the response should be staff-driven responses as each are focused on the organization's compliance with federal or state requirements.

5.1 Describe the process for neutral brokerage of adult, dislocated worker, and youth services. Identify the competitive process and criteria (such as targeted services, leverage of funds, etc.) used to award funds to sub-recipients/contractors of WIOA Title I Adult, Dislocated Worker, and Youth services, state the names of contracted organizations, and the duration of each contract. [WIOA Sec. 108(b)(16)]

[Click here to enter text.](#)

5.2 Identify the One-Stop Operator and describe the established procedures for ongoing certification of one-stop centers.

[Click here to enter text.](#)

5.3 Provide an organization chart as Attachment A that depicts a clear separation of duties between the board and service provision.

5.4 Provide the completed Local Board Membership Roster form included in Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment B. See Local Plan References and Resources.

5.5 Provide the policy and process for nomination and appointment of board members demonstrating compliance with Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment C.

5.6 Provide the completed Local Workforce Development Board Certification Request form included in Oregon draft policy WIOA 107(c) – Appointment and Certification of Local Workforce Development Board as Attachment D. See Local Plan References and Resources.

5.7 Provide the name, organization, and contact information of the designated equal opportunity officer for WIOA within the local area.

[Click here to enter text.](#)

5.8 Identify the entity responsible for the disbursement of grant funds. See Local Plan References and Resources. [WIOA Sec. 108(b)(15)]

[Click here to enter text.](#)

5.9 Indicate the negotiated local levels of performance for the federal measures. [WIOA Sec. 108(b)(17)]

[Click here to enter text.](#)

5.10 Describe indicators used by the local board to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers and the one-stop delivery system, in the local area. [WIOA Sec. 108(b)(17)]

[Click here to enter text.](#)

5.11 Provide a description of the replicated cooperative agreements, as defined by WIOA 107(d)(11), in place between the local board and the Department of Human Services' Office of Vocational Rehabilitation Services with respect to efforts that will enhance the provision of services to individuals with disabilities and to other individuals, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)]

[Click here to enter text.](#)

5.12 Describe the process for getting input into the development of the local plan in compliance with WIOA section 108(d) and providing public comment opportunity prior to submission. Be sure to address how members of the public, including representatives of business, labor organizations, and education were given an opportunity to provide comments on the local plans. If any comments received that represent disagreement with the plan were received, please include those comments here. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)]

[Click here to enter text.](#)

5.13 State any concerns the board has with ensuring the compliance components listed below are in place. Copies of documents are not required at this time but may be requested during monitoring.

- Administration of funds
- Agreement between all counties and other local governments, if applicable, establishing the consortium of local elected officials
- Agreement between the Local Elected Officials and the Workforce Development Board
- Local Workforce Development Board Bylaws
- Code of Conduct
- Approved Budget
- Memorandum of Understanding and/or Resource Sharing Agreements, as applicable
- Required policies on the following topics
  - Financial Management including cost allocation plan, internal controls, cash management, receipts of goods, cost reimbursement, inventory and equipment, program income, travel reimbursement, audit requirements and resolution, annual report, property management, debt

collection, procurement, allowable costs

- Program Management including equal opportunity for customers, supportive services, needs related payments, file management, eligibility, self-sufficiency criteria, individual training accounts, layoff assistance, priority of services, grievance for eligible training providers list, determination of an insufficient number of eligible training providers in the local area (if applicable), transitional jobs, stipends, training verification/refunds,
- Risk Management including records retention and public access, public records requests, monitoring, grievance, incident, disaster recovery plan
- Board Policies including board appointment, board resolutions, conflict of interest
- Human Resources including employee classification, benefits, holidays and PTO, recruitment and selection, employee development, discipline, layoffs, terminations, and severance, drug policy, sexual harassment, equal opportunity/non-discrimination
- Professional Services Contract for Staffing/Payroll Services, if applicable
- Contract for I-Trac Data Management System

**Click here to enter text.**

5.14 Provide the completed copies of the following local board approval forms:

- Statement of Concurrence
- Partner Statement of Agreement
- Assurances

WIOA compliant versions of these documents are posted at: <https://oregonlocalplanning.weebly.com/>