Oregon Workforce Investment Board

September, 2017
11:00 am – 1:30 pm
2:30 pm – 4:30 pm

Portland General Electric
Two World Trade Center
26 SW Salmon Street
Plaza Room
Portland, OR 97301
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## Members

- Ken Madden, Chair, Owner, Madden Industrial Craftsman
- Frank Wall, Vice Chair, Executive Director, Plumbing & Mechanical Contractors Association of Oregon
- Elana Pirtle-Guiney, Workforce and Labor Policy Advisor, Office of the Governor
- Chris Harder, Director, Business Oregon
- Kim Thatcher, Senator, Oregon Legislature, District 13
- Joe Weber, Global Director of Sales, ESCO
- Carrie Chaffee, OSU Federal Credit Union
- Ali O’Neill, O’Neill Construction Group
- Michael Dembrow, Senator, Oregon Legislature, District 23
- Barbara Byrd, Oregon AFL-CIO
- Paul Holvey, Representative, Oregon Legislature, District 8
- Shari Dunn, Dress for Success
- Anne Mersereau, Portland General Electric
- Gary Brown, Nvidia Corporation
- Kay Erickson, Director, Oregon Employment Department
- Bob Halligan, Willamette Valley Company
- Trina Lee, Director, Vocational Rehabilitation, DHS
- Rod Belisle, NECA/IBEW Electrical Training Center
- Mark Mitsui, President, Portland Community College
- Matt Millard, OHSU-AFSCME
- Jeffrey Kroslick, Options for Southern Oregon, Inc.
- Andrew McGough, Local Workforce Board – Worksystems
- Patrick Crane, Director, Office of Community Colleges and Workforce Development, HECC
- Kristina Payne, Executive Director, Lane Workforce Partnership

## Technical Advisors

- Karen Humelbaugh, Director, Office of Workforce Investments, HECC
- Jim Pfarrer, Director, Workforce Operations Division, Oregon Employment Department
- Dacia Johnson, Commission for the Blind
- Dan Haun, Deputy Director, Self Sufficiency, DHS
- Pete Karpa, Deputy Director, Vocational Rehabilitation, DHS

## Staff

- Todd Nell, Executive Director, OWIB
- Clay Martin, OWIB and Workforce Analyst, OWIB
- Jennifer Denning, Program Analyst, OWIB
- Kelly Dickinson, Program Analyst, OWIB

## September 8, 2017

**11:00 A.M. – 1:30 P.M.**

**2:30 P.M. – 4:30 P.M.**

Portland General Electric
Two World Trade Center
26 SW Salmon Street
Plaza Room
Portland, OR 97301

To listen, call: 877-810-9415, Access Code: 9550046

*Please note: A portion of the afternoon discussion will be in small groups and may not be audible by phone.

## AGENDA

Persons wishing to testify during the public comment period should sign up at the meeting. Times approximate and order of agenda items may vary.


<table>
<thead>
<tr>
<th>Time</th>
<th>Item</th>
</tr>
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<tbody>
<tr>
<td>11:00</td>
<td><strong>1.0 Call to Order and Opening Remarks</strong> Chair Madden</td>
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<tr>
<td>11:10</td>
<td><strong>2.0 Consent Agenda</strong></td>
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<tr>
<td></td>
<td>2.1 CONSENT ITEM: Approve March and June 2017 OWIB minutes</td>
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<tr>
<td></td>
<td>2.2 CONSENT ITEM: Approve May, July, and August 2017 OWIB Executive Committee minutes</td>
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<td>2.3 CONSENT ITEM: Approve June and August 2017 OWIB Continuous Improvement Committee minutes</td>
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<td>2.4 CONSENT ITEM: Approve June 23, 2017 OWIB Youth Taskforce minutes</td>
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<td>2.5 CONSENT ITEM: Approve May 9, 2017 OWIB Strategic Planning Taskforce minutes</td>
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<tr>
<td>11:15</td>
<td><strong>3.0 Public Comment</strong></td>
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<td>Each individual/group will have a time limit of three minutes.</td>
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<tr>
<td>11:25</td>
<td><strong>4.0 Intersection of Economic and Workforce Development</strong></td>
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<td>Jon Stark, Redmond Economic Development, Inc. (REDI)</td>
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<td>11:55</td>
<td><strong>5.0 Governor’s Office Report</strong></td>
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<td>Elana Pirtle-Guiney, Governor’s Office</td>
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<tr>
<td>12:05</td>
<td><strong>6.0 National Governor’s Association Conference: State Workforce Board Chairs and State Liaisons for Workforce Development Partnerships</strong></td>
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<td>Report from the 2017 Oregon Convening Chair Madden</td>
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All meetings of the Oregon Workforce Investment Board are open to the public and will conform to Oregon public meetings laws. A request for an interpreter for the hearing impaired or for accommodations for people with disabilities should be made to Kelly Dickinson at (503) 947-1733 or by email at HECC_WTDB@oregon.gov. Requests for accommodation should be made at least 72 hours in advance. Staff respectfully requests that you submit 15 collated copies of written materials at the time of your testimony. Persons making presentations including the use of video, DVD, PowerPoint or overhead projection equipment are asked to contact OWIB staff 24 hours prior to the meeting.
Members

Ken Madden, Chair, Owner, Madden Industrial Craftsmen
Frank Wall, Vice Chair, Executive Director, Plumbing & Mechanical Contractors Association of Oregon
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Minutes

March and June 2017 OWIB minutes
May, July, and August 2017 OWIB Executive Committee minutes
June and August 2017 OWIB Continuous Improvement Committee minutes
June 2017 OWIB Youth Taskforce minutes
May 2017 OWIB Strategic Planning Taskforce minutes
1. Welcome and Introductions
Chair Madden began the meeting at 1:05 PM with a round of introductions.

2. Consent Agenda
There was not a quorum. Consent agenda postponed for June 9, 2017 meeting.

3. Open Public Comment
Cord Bueker Jr. from Youth Development Division and the Youth Development Council made an announcement that the Youth and Community, the Youth and Innovation, Youth and Gangs and the Youth and Workforce Grant applications are now available online and being accepted. Visit www.OregonYouthDevelopmentCouncil.org for more information.

4. Local Area Programs and Best Practices
Bridget Dazey, Executive Director of the Clackamas Workforce Partnership, Andrew McGough, Director of Worksystems, and Jeanne Bennett, Chief Executive Officer of Workforce Southwest Washington, presented information on the Columbia-Willamette Workforce Collaborative as a best practice. McGough explained the history of the Columbia-Workforce Collaborative and how the partnership between SW Washington, Worksystems and Clackamas Workforce Partnership began in 2007. Bennet shared how adopting the Industry Engagement model developed by the state of Washington has allowed them to create and sustain an effective partnership between all partners in the collaborative. The model includes the following steps:
Step 1. Investigate
Step 2. Inventory and Analyze
Step 3. Skill Panels
Step 4. Creating a Plan and Acting on it
Step 5. Evaluation and Continuous Improvement

Bridget Dazey presented charts and figures that illustrated the success the collaboration has experienced (See attachments). From April 2015 to April 2016, their area had the fastest growing labor market regionally. McGough finished the presentation explaining the new grants and funding revenue that the regional partnership has attracted.

5. Break
6. Workforce Strategies

- **Work Opportunity Tax Credit**
  Dan Haun, Deputy Director of Self-Sufficiency Programs (SSP) for the Oregon Department of Human Services (DHS) provided updated information on the Work Opportunity Tax Credit (WOTC), the program intended to incentivize employers to hire various special populations including the long-term unemployed. A WOTC work group, including staff from the OWIB, the Oregon Department of Corrections (DOC), the Oregon Employment Department (OED), the Higher Education Coordinating Commission (HECC) and DHS, has been created since the last time Haun and Jim Pfarrer presented to the board. The focus of the workgroup is how to enhance utilization of the WOTC program by educating employers on the benefits and creating awareness of its existence with job seekers. In addition to the goal of focusing efforts on increasing awareness of the program, the workgroup is also looking into ways to document and track the progress of the efforts. Member Gary Brown mentioned that he would like to see a document of frequently asked questions to provide to job seekers or employers. Haun anticipates having a report to the OWIB of where we’ve come from and where he anticipates going by September 2017 the latest December 2017.

- **Oregon Talent Council (OTC) and Talent Plan**
  Charlie Hopewell, the ex-oficio member of the OTC, presented a generalized report on the current status of the council and the similarities of the OTC Talent Plan and the OWIB Strategic Plan. One key difference that the OTC highlighted was that their goal was not simply to get more graduates and skilled workers, but to get better and faster at developing skilled labor. They also identified that a large portion of the population needing to be skilled up were already in the workforce.

  Melissa Leoni, Executive Director of the OTC, approached the board with inquiries about how the OTC’s Talent Plan could be altered or updated to help support the work of the OWIB. She informed the board that the OTC is looking in to where investments could happen that would help fill gaps in training and employment. Chair Madden suggested Nell and Leoni continue working together to see how the Talent Plan can complement the work and plan of the OWIB.

7. Legislator Workforce Updates

Representative Jeff Reardon from district 48, former high school teacher and Career and Technical Education teacher, presented a diagram of the current workforce system. Information to create the diagram was pulled from numerous workforce partners. He commented that business and industry need to have a larger role in the system. Having that guidance will provide a clearer picture of how to include K-12 and other necessary partners. Those relationships need to be strengthened and utilized to discuss forward looking movements. Rep. Reardon provided the board with a handout of Colorado’s system as an example of a best practice.

8. Updates from Chair and Executive Director

Chair Madden announced that Oregon was chosen to host the Summer Oregon National Governor’s Association (NGA) Conference. OWIB staff will create and organize a subcommittee to help plan and coordinate arrangements for the meeting. Chair Madden thanked the OWIB team for pulling things together for the proposal and he thanked Heather Ficht for her hard work in the workforce development system. He presented her with the first OWIB Collaborative Action Award. Madden also thanked the Tillamook Cheese Factory for the contributions to the NGA Conference presentation.
Executive Director Nell updated the board on the status of the Oregon Youth Taskforce. The taskforce has worked to identify what the key priority goal for youth in Oregon:

- Strengthen the alignment between secondary and post-secondary education and workforce development programs and services at both state and local levels and in both rural and urban communities.
- Expand and invest in strategies that provide work experience and essential workplace skills (including life skills and soft skills) that result in demonstrated proficiency in academic and professional skill sets.

The OWIB will be working with the Oregon Youth Development Council, as well, in reviewing grant applications as they are submitted in an effort to increase collaboration.

Nell provided an updated on the WIOA Implementation Committee. Work continues to move forward on their project plan with a variety of partners including the OWP, the HECC, OED, VR and DHS Self-Sufficiency.

9. Additional Resources
Additional handouts were provided for informative reading materials.

10. Closing Remarks and Adjournment
Chair Madden closed the meeting at 2:36pm

11. Next Steps
- Present a report to the OWIB in September or December of how progress is coming with the WOTC program and what the future looks like.
- OTC continues to collect data from industries to identify where the gaps lay.
- Todd Nell and Melissa Leoni continue to discuss the interrelationship of the OWIB Strategic Plan and the work of the OWIB with the OTC’s Talent Plan.
- Create a taskforce to generate ideas and plans of how to highlight nationally the great work happening in Oregon.
- Create a Strategic Plan Taskforce to help drive work towards accomplishing the goals of the OWIB and to help ensure the Strategic Plan remains relevant and aligned with the Governor’s priorities.
- Incorporate YDC and Vocational Rehabilitation in the discussions around youth.
Oregon Workforce Investment Board (OWIB)

June 9, 2017

11:00 A.M. – 4:00 P.M.
Annual Business Meeting
Chemeketa Center for Business and Industry (CCBI)
626 High Street NE
Salem, OR

MEETING MINUTES

Members Present: Ken Madden, Chair; Frank Wall, Vice Chair; Elana Pirtle-Guiney; Joe Weber; Carrie Chaffee; Ali O’Neill; Barbara Byrd; Shari Dunn; Gary Brown; Kay Erickson; Trina Lee; Rod Belisle; Mark Mitsui; Matt Millard; Jeffrey Krolick; Patrick Crane; Kristina Payne.

Members Excused: Chris Harder; Kim Thatcher; Charlie Hopewell; Michael Dembrow; Paul Holvey; Anne Mersereau; Bob Halligan; Andrew McGough;

Technical Advisors and Staff Present: Karen Humelbaugh; Jim Pfarrer; Dan Haun; Todd Nell; Clay Martin; Kelly Dickinson.

Agenda and Materials Packet

Additional Handouts

Working lunch with Oregon Workforce Partnership

1.0 Call to Order/New Member Introductions
Chair Madden called the meeting to order at 1:32pm and provided an overview of the agenda. Chair Madden thanked Oregon Workforce Partnership for hosting a working lunch prior to the business meeting and thanked OWIB members who have participated in additional committees and workgroups in between Board Meetings. Chair Madden extended a welcome to new OWIB members Rod Belisle, Chris Harder, Anne Mersereau, Mark Mitsui, and Kristina Payne.

2.0 Public Comment
None.

3.0 Consent Agenda

- One-Stop Certification Policy
- One-Stop Operator Procurement Policy
- MOU/Cost Sharing Policy
- Adult and Youth Formula Funding Policy
- Dislocated Worker Formula Funding Policy
- Priority of Service Policy

ACTION ITEMS

All meeting materials can be found at: http://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx. If you are unable to read the materials, please contact kelly.d.dickinson@oregon.gov.
Oregon Workforce Investment Board (OWIB)

Motion: Frank Wall moved to approve the One-Stop Certification Policy; Joe Weber seconded the motion. Chair Madden called for a voice vote and the motion was approved unanimously.

Motion: Joe Weber moved to approve the One-Stop Operator Procurement Policy; Frank Wall seconded the motion. Chair Madden called for a voice vote and the motion was approved unanimously.

Motion: Frank Wall moved to approve the MOU/Cost Sharing Policy; Rod Belisle seconded the motion. Chair Madden called for a voice vote and the motion was approved unanimously.

Motion: Jeff Krolick moved to approve the Adult and Youth Formula Funding Policy; Joe Weber seconded the motion. Chair Madden called for a voice vote and the motion was approved unanimously.

Motion: Rod Belisle moved to approve the Dislocated Worker Formula Funding Policy and the Priority of Service Policy; Frank Wall seconded the motion. Chair Madden called for a voice vote and the motion was approved unanimously.

4.0 Policies

Joe Weber provided an overview of the Minimum Training Expenditure Policy and the stakeholder engagement and discussions leading to the proposed policy before the Board for approval.

ACTION ITEM

Motion: Joe Weber moved to approve the Minimum Training Expenditure Policy with no revisions, as recommended by the MTE Policy Workgroup; Barbara Byrd seconded the motion. Kristina Payne declared a conflict of interest and refrained from voting. Chair Madden called for a voice vote and, after no discussion, the motion was approved unanimously.

5.0 Governor’s Office

Legislative Update

Elana Pirtle-Guiney provided an update of recent legislative activities related to workforce funding and activities, including an update on House Bill 3437. Pirtle-Guiney emphasized the importance of coordinating and aligning with partners and stakeholders as much as possible to maximize effectiveness of investments in tight budget years.

Membership Update

Pirtle-Guiney also updated the Board on membership activities underway, including recruiting potential Board members from the health care industry, those representing rural communities, and holding vacant seats for any Oregon Talent Council members who may be interested in joining OWIB.

6.0 Budget

Karen Humelbaugh, Director of the HECC Office of Workforce Investments, provided an overview of WIOA basics and a summary of the budget.

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Oregon Workforce Investment Board (OWIB)

7.0 Strategic Planning

*Approve Strategic Plan Updates*

Clay Martin, OWIB and Workforce Analyst with the HECC Office of Workforce Investments, reviewed the proposed revisions to the OWIB Strategic Plan, as recommended by the OWIB Strategic Planning Taskforce for adoption. The revisions incorporate the Governor’s priorities and recommendations from the OWIB Youth Taskforce on the top youth priorities.

**ACTION ITEM**

Motion: Joe Weber moved to approve the revisions to the Strategic Plan as presented; Rod Belisle seconded the motion. Chair Madden called for a voice vote and after no discussion, the motion was approved unanimously.

*Approve Strategic Realignment of OWIB Actions*

Martin also provided an update on the strategic realignment of OWIB actions, as illustrated in the OWIB Planning Forecast – Alignment Summary. Martin explained the primary purpose of the forecast is to show alignment of the OWIB strategic planning processes with biennial budget and legislative processes.

**ACTION ITEM**

Motion: Frank Wall moved to adopt the OWIB Planning Forecast to guide and align OWIB efforts going forward; Matt Millard seconded the motion. Chair Madden called for a voice vote and after no discussion, the motion was approved unanimously.

8.0 Break

The Board recessed for a break at 2:30 P.M. and reconvened at 2:45 P.M.

9.0 Oregon’s Economy

*Employment Landscape of Rural Oregon*

Nick Beleiciks, State Employment Economist, and Gail Krumenauer, Senior Economic Analyst, with the Oregon Employment Department, presented an overview of Oregon’s Labor Market Landscape and led the Board in a discussion of the recent OED report “The Employment Landscape of Rural Oregon.”

10.0 Local Areas

Heather DeSart, Executive Director of Northwest Oregon Works; Heather Ficht, Executive Director of East Cascades Workforce Board; and Jake McClelland, Executive Director of Southwestern Oregon Workforce Investment Board, presented an overview and update of the Local Workforce Boards. In addition, the Oregon Workforce Partnership provided three handouts to the Board regarding data sharing, investments, and local workforce boards.

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<sup>1</sup>All meeting materials can be found at: [http://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx](http://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx). If you are unable to read the materials, please contact kelly.d.dickinson@oregon.gov.
11.0 Next Steps

Todd Nell, OWIB Executive Director, briefly reviewed a reference document provided to the Board that summarizes the state board roles under the Workforce Innovation and Opportunity Act and Oregon Revised Statutes.

Adjourn

Chair Madden adjourned the meeting at 3:47 P.M.
May 17, 2017

1:30 P.M. - 3:00 P.M.
Clackamas Community College
Wilsonville Training Center
29353 SW Town Center Loop East
Wilsonville, OR

MEETING MINUTES

Members Present: Ken Madden, Chair; Elana Pirtle-Guiney, Matt Millard.

Members Excused: Frank Wall, Vice Chair; Barbara Byrd.

Ex-Officio, Technical Advisors, and Staff Present: Kay Erickson; Karen Humelbaugh; Karen Litvin (phone); Todd Nell; Clay Martin; Jennifer Denning, Kelly Dickinson.

Agenda

1.0 Call to Order
Chair Madden called the meeting to order at 1:32pm and provided an overview of the agenda.

2.0 Legislative Update
Elana Pirtle-Guiney provided an update of recent legislative activities related to workforce funding and activities, including an update on House Bill 3437. Chair Madden suggested a representative from the Oregon Workforce Investment Board (OWIB) attend the upcoming hearing. Pirtle-Guiney also briefly spoke to the recently released revenue forecast.

3.0 Planning and Accountability
Clay Martin, OWIB and Workforce Analyst with the HECC Office of Workforce Investments, provided a high level overview of OWIB planned work and how it aligns with legislative and budget processes, as well as federal reporting and local monitoring.

4.0 Local Liaisons, OWP, and WIC
Tod Nell, Executive Director of the OWIB, explained how the OWIB WIOA Implementation Committee will soon transition to a committee focused on continual improvement once WIOA implementation is complete. Nell also led a discussion of the current structure of local liaisons with the OWIB and the local workforce boards. Discussion included how the local liaisons, OWP, and WIC are connected and how these entities can intentionally and thoughtfully build those connections to better align, continually improve, and move forward in local areas.

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Oregon Workforce Investment Board (OWIB)
Executive Committee

5.0 Policies
- Minimum Training Expenditures Policy
- One-Stop Certification
- One-Stop Operator Procurement Policy
- MOU/Cost Sharing Policy
- Priority of Service Policy
- Fund Allocation Policies for Adult/Youth and Dislocated Worker

Tod Nell, Executive Director of the OWIB, provided an overview of the policies before the Committee for approval and recommendation to the OWIB. Nell recommended that Chair Madden establish a work group to evaluate the proposed Minimum Training Expenditures Policy, along with the comments on the proposed policy submitted by the Oregon Workforce Partnership.

ACTION ITEM
Motion: Matt Millard moved to approve the One-Stop Certification, One-Stop Operator Procurement, MOU/Cost Sharing, Priority of Service, and Fund Allocation Policies for Adult/Youth and Dislocated Worker Policies as presented and recommend adoption by the OWIB and for Chair Madden to establish a work group to finalize the Minimum Training Expenditures Policy; Chair Madden seconded the motion. Discussion included the desire to review comments received on the proposed policy and to complete revisions and recommend adoption to the OWIB at the June 2017 meeting.

Chair Madden called for a roll call vote and after no further discussion, the motion was approved unanimously.

6.0 Public Comment
None.

7.0 Next Steps
Adjourn
Chair Madden adjourned the meeting at 2:31 P.M.
Members

Ken Madden Chair, VP Sales and Marketing, Madden Industrial Craftsmen, Inc.

Frank Wall Vice Chair, Executive Director, Plumbing & Mechanical Contractors Association of Oregon

Barbara Byrd, Secretary Treasurer, AFL-CIO

Elana Pirtle-Guiney, Labor and Workforce Policy Advisor, Governor Kate Brown’s Office

Matt Millard, System Application Analyst, Oregon Health and Science University

(Vacant Seat)

Ex-Officio

Kay Erickson, Director, Oregon Employment Department

Patrick Crane, Director, Office of Community Colleges and Workforce Development, HECC

Technical Advisors

Greg Ivers, Workforce Coordinator, Department of Human Services

Karen Humelbaugh, Director, Office of Workforce Investments, HECC

Karen Litvin, CEO, Oregon Workforce Partnership

Kurt Tackman, Program Manager, Office of Workforce Investments, HECC

Staff

Todd Nell, Executive Director, OWIB

Clay Martin, OWIB and WF Analyst, OWIB

Jennifer Denning, Program Analyst, OWIB

Kelly Dickinson, Program Analyst, OWIB

July 19, 2017

1:30 P.M. – 3:00 P.M.
Oregon Employment Department
Dave Pleasant Room
875 Union St. NE
Salem, OR

MEETING MINUTES

Members Present: Ken Madden, Barbara Byrd

Members Excused: Frank Wall, Matt Milliard, Elana Pirtle-Guiney

Ex-Officio, Technical Advisors, and Staff Present: Jennifer Denning, Clay Martin, Kurt Tackman, Greg Ivers, Todd Nell, Kay Erickson, Patrick Crane

Agenda

1.0 Call to Order
Chair Madden called the meeting to order at 1:34pm and provided an overview of the agenda.

2.0 Legislative Update
Kay Erickson gave an overview of the legislative session and also spoke to the key items related the Oregon Employment Department and OWIB. This included HB 3437 that eliminated the Talent Council and moved the work of the Talent Plan to the OWIB to carry out.

Patrick Crane provided an update from the Community Colleges and Workforce Development perspective. Patrick noted that HB 2311 charges the Higher Education Coordinating Commission (HECC), in coordination with the OWIB, with developing educational attainment goals for adult Oregonians who are not enrolled in an education program. The goals must be associated with current and projected job opportunities for adult Oregonians and be designed to promote labor market success.

3.0 NGA Summer Conference Update
Todd Nell gave an overview of the planning that has been happening to prepare for the National Governor’s Association (NGA) Summer Conference that Oregon is hosting. The conference will be held August 13-18 at the Marriott in Portland.

4.0 Board Name Change/Branding
Todd referenced HB 3437 that repealed the Talent Council and moves the work of the Talent Plan to the OWIB. The bill also changed the name of OWIB

1All meeting materials can be found at: http://www.oregon.gov/owib/committees/Pages/ExecutiveCommittee.aspx. If you are unable to read the materials, please contact jennifer.l.denning@oregon.gov.
Oregon Workforce Investment Board (OWIB)  
Executive Committee

to the Workforce and Talent Development Board. Todd stated that the OWIB plans to contract with a marketing firm to help with rebranding that includes a new name and logo that represents the changes in the work of the board. There will be more updates at the next full OWIB meeting.

5.0 Talent Plan Work Plan
Clay Martin gave an update on the transition of the work of the Talent Plan and referenced a matrix that he put together to show what HB 3437 requires. This work will be incorporated into the OWIB strategic plan as well as the state plan. Local Workforce Development Boards will also need to incorporate these goals into their local plans. The items in the strategic and state plans will be approved by the full OWIB committee.

It was noted that there was no funding included in HB 3437 but there was approximately $1 million included in the HECC budget for the transition of this work.

6.0 Public Comment
None.

7.0 Next Steps
More information will be sent out regarding OWIB members attending the NGA conference.

Adjourn
Chair Madden adjourned the meeting at 2:17.

1All meeting materials can be found at: https://www.oregon.gov/owib/committees/Pages/ExecutiveCommittee.aspx.  
If you are unable to read the materials, please contact jennifer.l.denning@oregon.gov.
Members
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Frank Wall Vice Chair, Executive Director, Plumbing & Mechanical Contractors Association of Oregon
Barbara Byrd, Secretary Treasurer, AFL-CIO
Elana Pirtle-Guiney, Labor and Workforce Policy Advisor, Governor Kate Brown’s Office
Matt Millard, System Application Analyst, Oregon Health and Science University
(Vacant Seat)
Ex-Officio*
Kay Erickson, Director, Oregon Employment Department
Patrick Crane, Director, Office of Community Colleges and Workforce Development, HECC

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Karen Litvin, CEO, Oregon Workforce Partnership
Kurt Tackman, Program Manager, Office of Workforce Investments, HECC

Staff
Todd Nell, Executive Director, OWIB
Clay Martin, OWIB and WF Analyst, OWIB
Jennifer Denning, Program Analyst, OWIB
Kelly Dickinson, Program Analyst, OWIB

August 23, 2017
1:30 P.M. – 3:00 P.M.
Oregon Employment Department
Dave Pleasant Room
875 Union St. NE
Salem, OR

MEETING MINUTES

Members Present: Frank Wall, Barbara Byrd, Matt Millard, Elana Pirtle-Guiney

Members Excused: Ken Madden

Ex-Officio, Technical Advisors, and Staff Present: Todd Nell, Clay Martin, Jennifer Denning, Karen Humelbaugh, Shalee Hodgson, Kay Erickson, Greg Ivers, Patrick Crane, Karen Litvin

Agenda

1.0 Call to Order
Vice Chair Wall called the meeting to order at 1:32pm and provided an overview of the agenda.

2.0 Public Comment
None

3.0 NGA Summer Conference Update
Todd Nell stated that the NGA conference was a success both from national and state perspectives. The events and panels turned out great with the creative economy/innovation quadrant event being the most successful in terms of connections and relationships.

Karen Humelbaugh added that she wants to continue to move this work forward in terms of the theme around the future of work. In particular, looking at the changing workforce and the gaps in the talent pipeline.

4.0 HB 3437 Implementation
Talent Assessment Request for Proposal
Todd stated that Clay Martin has completed the statement of work for the Talent Assessment Request for Proposal (RFP). The RFP will be released in early winter and a vendor will be chosen by February 2018. There will be more details on this at the September 8 OWIB meeting.

Name Change
Todd explained that the OWIB has contracted with a marketing firm to work

*All meeting materials can be found at: [https://www.oregon.gov/owib/committees/Pages/ExecutiveCommittee.aspx](https://www.oregon.gov/owib/committees/Pages/ExecutiveCommittee.aspx).
If you are unable to read the materials, please contact [jennifer.l.denning@oregon.gov](mailto:jennifer.l.denning@oregon.gov).
Oregon Workforce Investment Board (OWIB)
Executive Committee

on re-branding the OWIB to meet the requirements of HB 3437. More information on this will be presented on the September 8 OWIB meeting.

5.0 HB 2311 Work Plan
Todd noted that work is continuing on the implementation of the work plan for meeting the requirements of HB 2311. Julia Steinberger from the Higher Education Coordinating Commission is the point person on this project. Julia gave a brief overview of the work plan.

The work plan will be presented to the full OWIB at the September 8 meeting. Elana Pirtle-Guiney and Barbara Byrd asked that more context around HB 2311 and the goals and purpose of the work plan be shared at that meeting.

6.0 September OWIB Meeting Agenda
Todd gave an overview of the draft agenda for the September 8 OWIB meeting and stated the theme will be business, industry and economic development. The agenda was approved by the group.

7.0 Local Board Assessment
Shalee Hodgson gave an overview of the plan for assessing the local boards. Shalee stated that the assessment includes four categories with accompanying indicators, based on national best practices and characteristics of high performing local boards. Shalee will conduct the assessments by observing a board meeting in addition to meeting with board members, partners, stakeholders, etc. In the future this tool can be used in the local board certification process and the process will continue to be refined. The tool will be reviewed by the full OWIB and the results of the assessments will be reviewed by the Continuous Improvement Committee. Overall, the local boards are looking forward to the process. Shalee stated that she will keep the Executive Committee updated. Todd will email the assessment tool to the committee.

8.0 OWIB Internship Proposal
Todd announced that the OWIB would like to provide work experience opportunities and is looking into bringing on an intern from one of the local colleges or universities. The intern would have an opportunity to be involved in analysis and reporting work. More details will be provided once they are fleshed out.

Adjourn
Vice Chair Wall adjourned the meeting at 2:05.
Members Present: Joe Weber, Chair, Frank Wall, Heather DeSart (for Kristina Payne), Patrick Crane, Jim Pfarrer, Dan Haun, Pete Karpa, and Karen Humelbaugh.


Staff Present: Todd Nell; Clay Martin; Kurt Tackman, Jordana Barclay.

Agenda¹

1.0 Call to Order
Chair Weber called the meeting to order at 2:00 pm and provided an overview of the agenda.

2.0 Legislative Update
Todd Nell, Executive Director of the OWIB, and Clay Martin provided an update of recent legislative activities related to House Bill 3437 and the reassignment of the Oregon Talent Plan.

3.0 WIOA Implementation Priority Matrix
Clay Martin and Kurt Tackman provided a progress update on the WIOA Implementation Priorities, including an overview of the topic area, the action taken or recommended, and the next step deadline. Martin led the Committee members in a discussion regarding reconsiderations to the Priority Matrix. The members present agreed that the tracking of policies should continue but in a form that is more of a progress indicator list.

In addition, there was discussion of the anticipated transition from the WIOA Implementation Committee to a Continuous Improvement Committee.

To better provide perspective from both a Rural and Urban lens, Chair Weber noted that it might be effective to have Heather DeSart with NOW represent OWP. She brings both rural Oregon and metro Las Vegas perspective.

4.0 Sector Partnership Metrics
Jordana Barclay provided an update on the Sector Partnership Metrics, highlighting indicators of a high performing sector partnership before the

¹All meeting materials can be found at: [https://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx](https://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx). If you are unable to read the materials, please contact kelly.d.dickinson@oregon.gov.
Committee for approval and recommendation to the OWIB. Barclay emphasized that these indicators are a combination of process and outcome measures that focus on successful partnerships, not outcome measurements related to activity implementation of sector partnership.

The membership expressed interest in continued discussion regarding sector partnership metrics.

5.0 Public Comment
None.

6.0 Next Steps
Adjourn
Chair Weber adjourned the meeting at 3:10 pm.
Oregon Workforce Investment Board (OWIB)
Continuous Improvement Committee (CIC)
August 1, 2017
2:00pm-3:00pm

Members Present: Joe Weber, Chair, Barbara Byrd, Heather Ficht, Heather DeSart, Julia Steinberger (for Patrick Crane), Jim Pfarrer, Pete Karpa, Karen Humelbaugh

Members Excused: Frank Wall, Kim Thatcher, Dan Haun

Staff Present: Todd Nell, Clay Martin, Kurt Tackman

Agenda

1.0 Call to Order
Chair Weber called the meeting to order at 2:00 pm and provided an overview of the agenda.

2.0 Public Comment
None.

3.0 Committee Transition (Clay Martin)
Clay Martin provided an overview of the changes to the name of the committee and the charter for the committee. The changes to the name and the charter for the CIC were approved with a suggestion (made by Heather Ficht) to add an economic development member to the committee as soon as possible.

4.0 MOU and Cost Sharing Update (Clay Martin)
Clay Martin provided an update of the status of local workforce development board (LWDB) progress in submitting local area memoranda of understanding and cost sharing agreements. These agreements were due June 30, 2017. Karen Humelbaugh will be sending a letter to each LWDB additional materials required from LWDBs.

5.0 Local Board Assessment Tool (Shalee Hodgson)

All meetings of the Oregon Workforce Investment Board are open to the public and will conform to Oregon public meetings laws. A request for an interpreter for the hearing impaired or for accommodations for people with disabilities should be made to Kelly Dickinson at 503-947-1733 or by email at HECC_WTDB@oregon.gov. Requests for accommodation should be made at least 72 hours in advance. Staff respectfully requests that you submit 15 collated copies of written materials at the time of your testimony. Persons making presentations including the use of video, DVD, PowerPoint or overhead projection equipment are asked to contact OWIB staff 24 hours prior to the meeting.
Shalee Hodgson provided an overview of a new tool and process for LWDB assessment to be piloted/tested this year with all LWDBs. The tool was developed with consultant assistance to represent the characteristics of high-performing boards based on national best practices aligned with the unique elements in Oregon. This year it is intended to provide baseline information regarding Oregon LWDB best practices as well as LWDB strengths and weaknesses. Ultimately, it is expected to be incorporated into the LWDB certification process. The full OWIB will approve the final assessment tool and the results of the assessment will come to the CIC.

6.0 WIOA Allocation Formula (Karen Humelbaugh)
Karen Humelbaugh began a discussion regarding the WIOA allocation formula and LWDB sustainability. In general, federal and state funds have decreased since 2000 while LWDBs have increased responsibilities under WIOA. There is not predictability in funding but the overall trend is down. There can be erratic ups and downs that sometimes favor urban over rural and recent economic trends have affected some LWDBs because they no longer have areas of substantial unemployment. The state provided its first ever General Fund investment in 2011-13. Growth over time helped offset reductions in federal funding, but the General Fund investment for 2017-19 is down.

There is limited flexibility in the WIOA funding allocation formula. This is governed by TEGL 27-16. State General Fund money can be more flexible especially for future biennia. There are four options to consider for distribution: (1) WIOA formula or some other state-specific formula, (2) Equal distribution to all LWDBs, (3) Equal base plus a formula for the remainder, and (4) Competitive grants to LWDBs.

The CIC requested that staff bring back scenarios or simulations for the 2019-21 biennium for the distribution of General Fund dollars along with analysis of the advantages and disadvantages and the impact to LWDBs. In addition, the CIC requested that staff bring back options to consider for the cost side of LWDB sustainability including an analysis of the advantages and disadvantages and the impact to LWDBs. The CIC intends to consider these options in a deliberate process before making recommendations to the OWIB.

7.0 Developing New Education and Training Goals for Adult Oregonians (Clay Martin)
Clay Martin provided a brief overview of the implementation work plan for HB 2311 which will result in the development of new education and training goals for adult Oregonians separate and distinct from 40-40-20. Clay Martin also introduce Julia Steinberger, Community College and Workforce Policy Analyst for HECC CCWD, who is the lead staff person.
for the implementation project.

8.0 Policy/Priority Tracking (Clay Martin)
Clay Martin briefly introduced the new form for policy and priority tracking. Joe Weber recognized the importance of the information and requested that the form lead off next meeting to ensure that there is time for consideration and discussion.

Adjourn
Chair Weber adjourned the meeting at 3:10 pm.

Meeting Materials are posted at http://www.oregon.gov/owib.
Oregon Workforce Investment Board (OWIB)  
Youth Taskforce

June 23, 2017

1:00 P.M. – 3:00 P.M.  
Oregon Employment Department  
Third Floor, Room 312  
875 Union St. NE  
Salem, OR

MEETING MINUTES

Members Present: Frank Wall-Chair, Nick Mathern, Heather Ficht

Members Excused: Abby Hoffar, Celeste Janssen, Michael Dembrow, Rhonda Rhodes

Ex-Officio, Technical Advisors, and Staff Present: Cord Bueker, Karen Humelbaugh; Todd Nell; Jennifer Denning.

Agenda

1.0 Call to Order  
Frank Wall called the meeting to order at 1:12pm.

2.0 Review of April Minutes  
The minutes were reviewed from the April meeting and they were approved by the group.

3.0 Updates  
Karen Humelbaugh gave a brief legislative update involving the workforce system.

4.0 Develop Action Items to Accomplish Priorities/ Review Matrix  
The group had an open discussion around the following goal:

"Strengthen alignment between secondary and post-secondary education and workforce development programs and services at both the state and local levels and in both rural and urban communities."

The discussion focused on data and learning more about what is currently being collected, particularly around students that drop out or are close to dropping out.

Todd Nell and Jennifer Denning will meet with staff from the Oregon Department of Education to learn more their data systems. Jennifer will also meet with youth program managers from each of the Local Workforce Investment Boards to learn how they partner with their local school districts.
and engage youth in their programs.

5.0 Career and College Collaborative Overview

Lori Ellis from the Higher Education Coordinating Commission attended the meeting to give an overview the group that she is spearheading. The Career and College Collaborative, or C3, is a cross-sector action group working to mobilize counselors and educators with a focus on guiding every student to success in career and college.

Adjourn

The meeting was adjourned at 2:48pm.
Oregon Workforce Investment Board  
Strategic Planning Taskforce

May 9, 2017

10:00 A.M. – 11:30 P.M.
Oregon Employment Department
Dave Pleasant Room, 3rd Floor
875 Union Street NE
Salem, OR

MEETING MINUTES

Members Present: Rod Belisle, Shalee Hodgson, Dan Haun.

Members Excused: Carrie Chaffee, Shari Dunn.

Staff and Technical Advisors Present: Todd Nell, Jennifer Denning, Kelly Dickinson.

Agenda

1.0 Call to Order

Todd Nell, OWIB Executive Director, called the meeting to order at 10:04am. Nell identified the goals of the taskforce meeting and led the members in a review of the OWIB Strategic Plan 2016-17.

2.0 Governor’s Priorities: Poverty, Communities of Color and Rural Communities

Nell reviewed the Governor’s priorities as expressed in the letter dated December 7, 2016 and proposed draft language to be incorporated into the strategic plan. The taskforce evaluated the proposed language and identified the Introduction section on page 5 as the most appropriate section of the strategic plan to add the new language.

3.0 Youth Taskforce Priorities

Nell presented the top youth priorities as identified by the OWIB Youth Taskforce. The taskforce evaluated the proposed language and identified Goal 4 on page 8 as the most appropriate section of the strategic plan to add the new language.

4.0 Talent Plan

Shalee Hodgson, Deputy Director of Oregon Workforce Investments, provided an update on the Oregon Talent Council Talent Plan, currently under revision as scheduled on a biennial basis. Hodgson also provided an update on proposed legislation that would transition the Talent Council from the Employment Department to the OWIB and began a discussion of how the OWIB would incorporate the Talent Plan into the current

1All meeting materials can be found at: https://www.oregon.gov/owib/committees/Pages/Joint-Committees-Taskforces-and-Workgroups.aspx. If you are unable to read the materials, please contact kelly.d.dickinson@oregon.gov.
Strategic Plan, as well as how possible funding associated with the Talent Council could transfer to the OWIB through the Higher Education Coordinating Commission. The taskforce discussed multiple options for the OWIB to take regarding the Talent Plan: incorporating the plan into the OWIB Strategic Plan, referencing the Talent Plan as a stand-alone document, incorporating the Talent Plan as a supplement to the OWIB Strategic Plan, or another interim option in order to engage the OWIB and intentionally combine the two strategic plans at a later date. The taskforce discussed adding a cover letter to the OWIB Strategic Plan describing the interconnectedness between the OWIB and the Talent Council, identifying and describing illustrative examples, and incorporating the Talent Plan as a supplement to the OWIB Strategic Plan until more intentional work on interlocking the two strategic plans at a later date.

5.0 Apprenticeship, Business Services, and 2-Gen
Dan Haun, Deputy Director of Self Sufficiency, and Hodgson provided an overview of Apprenticeship, Business Services, and 2-Gen programs as options to incorporate into the OWIB Strategic Plan. The taskforce identified key aspects of these programs and suggested Nell draft proposed language to incorporate in the appropriate section(s) of the strategic plan.

6.0 Funding
This agenda item was discussed along with agenda item 4.0.

7.0 Next Steps
Nell presented the OWIB Equity Lens for Workforce, as adopted in November 2014, and led the taskforce in a discussion as to the most appropriate section of the strategic plan to incorporate the Equity Lens. The taskforce was satisfied that the Equity Lens for Workforce was appropriately referenced in the Guiding Principles section in page 6 and made a minor suggestion to reference the document by name in this section.

ACTION ITEM
Motion: Rod Belisle, Director of the NECA-IBEW Electrical Training Center, moved to incorporate the changes to the OWIB Strategic Plan as discussed with a recommendation to the OWIB for final adoption of the revisions; Haun seconded the motion. Nell called for a voice vote and after no discussion, the motion was approved unanimously.

8.0 Adjourn
Nell adjourned the meeting at 11:14 A.M.
Workforce Development is never more important to the success of the Oregon economy as it is today. How do we bridge the needs of business with the resources in workforce development and respond in a timely manner? Jon Stark, Sr. Director of Redmond Economic Development, Inc. and President of the Oregon Economic Development Association will present on the intersection of economic and workforce development, highlighting the successful relationship Central Oregon has with the local workforce investment board. How can this model be replicated around the State? How can we further educate economic development professionals on workforce tools, process, and policy in the years following the local workforce board redesign?
2018-20 Oregon Talent Assessment (a part of House Bill 3437 Implementation)

House Bill 3437’s purpose is to improve the statewide approach to effective and integrated workforce development. The Bill Requires that OWIB create a single, unified Workforce and Talent Development Plan every biennium in collaboration with key industries and State workforce stakeholders. The 2018-20 Oregon Talent Assessment\(^1\) is a part of the Workforce and Talent Development Plan and is a statewide general analysis of current and future in-demand occupations, skills, and certifications, badges, and industry-based credentials and a detailed analysis of 8-10 key industries in the state that are in strategic alignment with state and local workforce and economic priorities. It is primarily the voice of business and industry to focus and prioritize public and private investment in workforce and talent development in Oregon. The 2018-20 Oregon Talent Assessment will be completed by June 30, 2018. An ongoing OWIB Planning Committee will be responsible for all planning efforts including the Talent Assessment.

ACTION ITEM: Approve Formation of an Ongoing OWIB Planning Committee

Developing New Educational and Training Goals for Adult Oregonians (House Bill 2311 Implementation)

Oregon’s 40-40-20 education and training attainment goal meant that 40% of Oregon’s adult population would hold a 4-year post-secondary degree or higher, 40% would hold a post-secondary certificate up to a 2-year degree, and the remaining 20% would have graduated high school career ready. Prior to the passage of House Bill 2311, Oregon’s 40-40-20 goal applied to all adult Oregonians. The purpose of House Bill 2311 is to establish Oregon’s 40-40-20 goal only for young adults who would be expected to realize the goal as they exit secondary or post-secondary education and distinguish it from the remaining adult population in Oregon. The remaining adult population will be expected to realize a new goal developed in partnership between the Higher Education Coordinating Commission and OWIB. The new goal will represent the current and projected workforce needs of the Oregon economy and will be developed over the coming months. The development of the new goal will be completed by June 30, 2018 and the development process will be integrated with the development of the 2018-20 Oregon Talent Assessment.

\(^1\) The Oregon Talent Plan: A Needs Assessment and Investment Strategy was completed by the Oregon Talent Council and released in June 2017.
Summary

In November of 2015, the Council developed its first Talent Development Plan, which proved to be an invaluable reference tool that inspired conversations with a variety of industry, education and workforce partners. The 2015 Plan focused on five industry sectors and identified ten priority occupational clusters. These priorities shaped the Council’s initial investment portfolio and created opportunities to build partnerships and pilot new initiatives for addressing targeted talent needs.

The 2016-2017 Investment Portfolio Summary describes the Council’s investment processes and criteria, its directed investment models, and the outcomes and products resulting from its investments.

Grants Awarded in Rounds 1 and 2

The Council invested nearly $3.4 million in nine projects that addressed known talent gaps in 8 of the 10 priority occupational clusters identified by the Talent Plan. The first round focused on Oregon’s public institutions of higher education to address urgent talent gaps and prepare students and incumbent workers to be quickly productive in priority occupations. The second round focused on innovative and cost-effective education and training models with clear, measurable outcomes, including those that could be scaled or rapidly adapted across the state and that connected education with applied skills or experience. Proposals in both rounds were evaluated on industry engagement, cost-effectiveness and agility, reach and diversity, sustainability, and metrics/evaluation methods.

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<tr>
<th>Award</th>
<th>Industry &amp; Occupational Cluster*</th>
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<tr>
<td>Mount Hood Community College ($453,129) Advanced Manufacturing Certification Center</td>
<td>Advanced Manufacturing (5)</td>
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<tr>
<td>OHSU ($672,403) Industry Relevant Training and Research Experiences for Biomedical Engineering and Data Science Students</td>
<td>Bioscience (1,2,7)</td>
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<td>OIT/Oregon Tech ($340,783) Cybersecurity Workforce Development</td>
<td>Information Technology (9)</td>
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<tr>
<td>Oregon State University ($533,686) Pacific NW Electrical System Resiliency/Disaster Preparedness Training</td>
<td>Energy (7)</td>
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<tr>
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<tr>
<td>Linn-Benton Community College ($50,000) Linn-Benton Surgical Technology Statewide Program</td>
<td>Healthcare (8)</td>
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<tr>
<td>OIT/Oregon Tech ($182,177) Supervised Practicum in ABA: Building Oregon’s Autism Behavioral Health Workforce</td>
<td>Healthcare (6)</td>
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<td>Oregon Manufacturing Extension Partnership ($552,316) Smart Talent</td>
<td>Advanced Manufacturing (3,5)</td>
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<td>Portland Community College ($577,500) Realizing Advanced Manufacturing Potential in Portland</td>
<td>Advanced Manufacturing (3,5)</td>
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<tr>
<td>University of Oregon ($33,991) Project OnRamp: Growing the Data Science Workforce in the State</td>
<td>Information Technology (1,2)</td>
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*Oregon Talent Plan Professional and Technical Occupational Clusters*

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<tr>
<td>(1) Systems and data specialists</td>
<td>(4) Rehabilitation therapists and assistants</td>
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<tr>
<td>(2) Data and business intelligence analysts</td>
<td>(10) Advanced materials engineers and scientists</td>
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<td>(3) Industrial machinists, millwrights and operators of highly computerized and/or automated processes</td>
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<td>(5) Technologically skilled mechanics and maintenance technicians</td>
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<td>(6) Mental and behavioral counselors</td>
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<tr>
<td>(7) Interdisciplinary engineers</td>
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<td>(8) Primary health care practitioners</td>
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<td>(9) Cyber and information security Specialists</td>
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**Directed Investments**

The Council in February 2016 approved a directed investments process where the Grants Committee and staff directly collaborated with industry, education and training partners to develop and refine project proposals and make investment recommendations on an ongoing basis. In July of 2016, the Grants Committee prioritized and defined five talent solution types for further investment. Through this process, the Council awarded just under $1.8 million to:

- A mix of infrastructure and pilot programs that could immediately impact talent needs.
- Scale or expand the reach of existing training or education models, or further develop successful models or templates so they could be implemented by other organizations and industries.

**Directed Investment Models**

- **Professional Skills Models**: To improve the interpersonal and employability skills of emerging or incumbent workers along with the technical skills needed by industry.
  - Models within specific programs or tracks, integrated into degree required coursework, or summer/final year skills academies

- **Internship Models**: Experiential learning and industry exposure
  - Application of professional and technical skills

- **Talent Infrastructure**: Better connect employers and students
  - Need better connections between industry and students and to develop best practices model from existing successful programs

- **Knowledge & Skills Transfer Models**: Understand skill gaps to influence training and education
  - Additional research or small pilots needed

- **Accelerated Retooling for Highly Technical Occupations**: Initiatives to transfer knowledge and skills from experienced and soon-to-retire employees to incumbent and emerging workers
  - Models to prepare students holding non-technical undergraduate degrees for technical graduate programs or jobs
  - Looking for models that test whether there are ways to accelerate this type of retooling
**Professional Skills Models**

This category includes models within specific programs or tracks, integrated into degree required coursework (undergrad or graduate degrees), as summer or final year skills academies, and by industry consortia for current workers. The purpose of these models is to improve both the interpersonal and employability skills of emerging or current workers, along with the professional or technical skills required by industry, so that workers are better prepared and become faster contributors.

- **Bend-Poly Academy Program Assessment and Recommendations ($25,000)**
- **Oregon Bioscience Association ($750,000) BioPro and BioCatalyst Training Expansion and Model Development**
- **Oregon State University College of Science ($200,000) Integrated Professional Development.**
- **TIE (The Indus Entrepreneurs) Oregon ($24,700) Entrepreneur Boot Camp Expansion**

**Internship Models**

Internship programs connect industry with education to provide students and emerging workers with better experiential learning and work exposure, and can support industry in finding the talent they need. Successful models exist in Oregon for some of the Talent Plan's key occupations, but there are gaps. The Grants Committee identified the need for additional research to identify existing programs and gaps, and the principles and components of successful programs, to inform and engage education and industry and guide future investments in pilots, models or infrastructure.

- **Business Education Compact ($27,000) BEC Student Internship Program**
- **McMinnville Economic Development Partnership ($19,800) Community Internship Training Initiative**
- **Oregon State University College of Science ($50,000) Internship Program Evaluation**

**Talent Infrastructure**

Outside of training and education models, the Council also identified a need to invest in talent development infrastructure, such as making it easier for Oregon employers to connect with post-secondary students or making it easier for current workers to access training.

- **Oregon College Talent Network ($62,000) Implementation of Handshake career services platform**
- **TrainOregon Project ($489,153)**

**Knowledge & Skills Transfer Models**

This model includes initiatives designed to transfer knowledge and skills within industries or companies from experienced and soon-to-retire employees to current and emerging workers. This is not unique to Oregon and is a priority for certain industries facing higher rates of retirements in key positions. The Committee identified the need for research or small pilots to help the Council identify where to make future investments.

- **Rogue Community College ($52,500) Knowledge & Skills Transfer for Manufacturing & Millwrights**

**Accelerated Retooling for Highly Technical Occupations**

These training and education models are designed to prepare individuals with non-technical undergraduate degrees for technical graduate programs or jobs. The Committee saw this model as key to determining whether there are ways to accelerate this type of training while at the same time partnering with higher education and STEM/CTE to attract more students to the occupations and industries where these jobs exist.

- **Portland State University ($92,000) New Beginnings Expansion**
Investment Results

The following sections summarize the key results or activities for each Council investment. Projects marked with “**” have produced a final report that details the lessons learned and/or recommendations that may offer insights for others considering the same type of initiative. Projects marked with “****” have produced a report and handbook or guide that will be available to help other industry associations, industry collaborations, educational institutions or workforce boards to adopt this model.

Round 1 and 2 Outcomes

**Linn-Benton Community College ($43,434.33)**
*Linn-Benton Surgical Technology Statewide Program.* LBCC developed a statewide Surgical Technology program and conducted outreach to community hospitals to connect with potential students. The program addresses the shortage of professionals in rural Oregon and meets new state requirements for formalized training to obtain nationally recognized certification.

**Mount Hood Community College ($453,129)**
*Advanced Manufacturing Certification Center (AMC Center).* MHCC designed and implemented the AMC Center to incorporate a career pathway model for industry certifications as well as develop an Associate of Applied Science degree program in Mechatronics. The AMC Center has been planned and developed with industry leaders and will have the capacity to train 500 new and existing manufacturing workers by 2021.

**Oregon Health & Science University ($672,403)**
*Industry Relevant Training and Research Experiences for Biomedical Engineering and Data Science Students.* OHSU and OSU will provide the skilled professionals needed to sustain Oregon’s growth in biomedical engineering and integrate industry-centric training and experiential learning activities within new undergraduate and graduate programs at OHSU and OSU. The grant supported industry internships in 2016 and 2017 for students at both institutions, poster presentations at the 2016 Oregon Bioscience Association conference, graduate student training, and data science training courses for industry professionals.

**Oregon Institute of Technology/Oregon Tech ($334,611.25)**
*Cybersecurity Workforce Development.* Oregon Tech developed curriculum for an undergraduate cybersecurity degree to launch in the fall of 2018. New courses were offered during the 2016-17 academic year with 53 students enrolled. Oregon Tech anticipates an initial enrollment of 20-25 students who are expected to graduate within 3-4 years. Three graduate level cybersecurity courses were also developed, with a specialized cybersecurity track for the Master of Science in Engineering to also launch in fall of 2018. Lastly, Oregon Tech launched operations of the Oregon Tech Cyber Defense Center to provide cybersecurity services to community businesses and organizations and provide real-world training and experience for cybersecurity students.

**Oregon Institute of Technology/Oregon Tech ($182,177)**
*Supervised Practicum in ABA: Building Oregon’s Autism Behavioral Health Workforce through University/Industry Partnerships.* This project increased statewide access to the education and practicum experiences necessary to meet licensure standards. Fifteen individuals participated in practicum during the grant period with support from the practicum coordinator. Sites were established in Portland, Wilsonville, Salem, Medford and Klamath Falls. Industry partners provided seven paid practicum placements, and two undergraduate students found employment as ABA therapists. Full-time faculty has been hired to ensure the sustainability of the intensive practicum program.
Oregon Manufacturing Extension Partnership ($552,316)

Smart Talent. OMEP provided short-term industry-based training to increase incumbent worker skill proficiency, as well as making comprehensive company culture changes to improve the training and promotion processes for all workers. Smart Talent is designed to help manufacturing companies address industry skill shortages through work-based training and creation of a learning culture. Projects were completed with six small-to-medium sized manufacturing companies in Oregon (A.R.E. Manufacturing Inc., Cabinet Door Service Company (CDS), Hardwood Industries, Miles Fiberglass & Composites, Bulk Handling Systems, and Vitro Flat Glass) and 279 workers completed training. All the completers of training at participating companies increased industry work experience. All participating companies mapped clear development paths, with five companies including compensation in these pathways. Four Smart Talent Workshops were also held in Eugene, Salem, Redmond, and Medford with 13 companies attending.

Oregon State University ($531,204.26)

Pacific NW Electrical System Resiliency/Disaster Preparedness Training. OSU partnered with PSU and industry partners Central Lincoln Public Utility District, Portland General Electric and Pacific Power to develop graduate level, professional development, and industrial short-courses for electrical power systems engineers to be trained for disaster preparedness and electrical system resiliency. The grant supported 13 internships in the summer of 2016 with utility partners focused on resiliency. The grant also supported development of ECE 499/599 Electrical System Resiliency as part of the Energy Systems curriculum; Spring 2017 course enrollment was 43 students. PSU also offered an industry short-course “Electrical System Resilience and the Cascadia Subduction Zone” on June 30, 2017; 42 managers and engineers attended. Participants will be surveyed in 2018 to evaluate and continue to improve workforce training.

Portland Community College ($577,500)

Realizing Advanced Manufacturing Potential in Portland (RAMP PDX). RAMP PDX will train, place, advance and retain participants in a variety of advanced manufacturing jobs. The project focused on increasing the pipeline for the many advanced manufacturing companies in the region through outreach and maker events, training, coaching/student support, program development (CADD, digital design and fabrication, and math bridge), mechatronics facility and program development, and increasing industry collaboration.

University of Oregon ($33,991)

Project OnRamp: Growing the Data Science Workforce in the State. This project developed and piloted a new course on Machine Learning and Predictive Analytics targeted to and delivered online to support a wide range of students, including non-computer science majors and incumbent workers. 87 students participated, and 15 graduating seniors participated and will become employees in summer of 2017.

Directed Investment Outcomes & Products

Bend-Poly Program Assessment and Recommendations ($25,000)** This investment evaluated the Bend-Poly Summer Academy model that was designed to develop professional skills in digital marketing through two iterations. The project sponsors developed a report identifying best practices and lessons learned and created a slide deck tool to use in creating similar programs.

Business Education Compact ($9,324.34) BEC Student Internship Program. The project placed 9 college students (first generation, students of color or low socioeconomic status) in paid work experiences. This project helped BEC understand their value proposition is in impacting high school students and they are developing a high school student handbook and model of engagement.

McMinnville Economic Development Partnership ($19,800)*** Community Internship Training Initiative. MEDP delivered four regional training sessions with 67 participants (Port of The Dalles, Bend, Albany and
Marion County) focused on helping communities launch industry-led internship programs. MEDP developed a printed program handbook and electronic templates and provided coaching to these communities. The Port of The Dalles has launched Gorge Works, and Bend and Albany are moving forward with their internship concepts.

**Oregon Bioscience Association ($750,000)***** BioPro and BioCatalyst Training Expansion and Model Development. Project scaled these existing workforce training programs and offered training to bioscience, manufacturing and tech companies in Bend and Eugene. Oregon Bio has created a handbook that can be used by other industry associations or workforce boards to implement similar professional development programs.

**Oregon State University College of Science (COS) ($248,590.57)***** Integrated Professional Development and Internship Program Evaluation. This investment is helping to build a content library and the structure to integrate professional development (self-awareness, interpersonal skills, and career skills) into existing undergraduate curricula. Four courses were integrated during the grant period with 150 enrolled students. Integration is currently being pursued for an additional 25 courses and two new positions are being sustained beyond the grant to further support the integration process. The COS also catalogued existing Oregon-based internship programs directly serving the Council’s industry clusters and has developed a template for designing high impact internship programs based on goals and best practices.

**Oregon College Talent Network ($56,000).** This investment assisted 14 of Oregon’s public and private collected and universities to switch to the Handshake Career Services Management System in order to better serve students and Oregon employers. A total of 15 institutions are now using the platform, which means that with one log-in an employer can post a job or internship that may reach 100,000+ Oregon students.

**Portland State University ($92,000)** New Beginnings for Biomedical Informatics. Expansion of 30-week accelerated grad program that prepares students holding non-technical undergraduate degrees to be successful in Computer Science graduate studies. This successful approach was applied to the OHSU Biomedical Informatics Graduate Program for the masters and PhD degrees in Health & Clinical Informatics and Bioinformatics & Biomedical Informatics. All three have common knowledge requirements for computer programming, so the resulting grad prep program will have the OHSU students participate in the first two quarters of the PSU New Beginnings program before transferring to OHSU for a customized third quarter.

**Rogue Community College ($37,788.72)** Knowledge & Skills Transfer for Manufacturing & Millwrights. This project was designed to pilot an effort to learn how to transfer the wisdom, experience and skills of retiring workers to the next generation through a mentorship and pre-apprenticeship model. The project recruited three mentors and three mentees. Skill gaps were identified and the greater part of the mentee’s training took place in the workplace with the mentor. RCC provided training to address the identified skills gaps. With valuable lessons learned, the sponsors and industry planning committee are interested in expanding the project to additional participants and other industries.

**TiE Oregon ($21,264.44)** Entrepreneur Boot Camp Expansion. TiE developed industry-specific curriculum complete with lesson plans and held two boot camps with 14 participants in digital health and food/beverage. TiE collaborated with the Digital Health Collaborative and appropriate TiE members for digital health, and the Northwest Food Processors Association, Rosemary Anderson/Portland Opportunities Industrialization Center (POIC) and food/beverage entrepreneurs for food/beverage. TiE is presenting the boot camp curriculum to other TiE Chapters (US and global) and with additional funding from Prosper Portland will offer another four boot camps over the next year. POIC and the Rockwood Community Center will be offering the food/beverage boot camp to their adult students in the fall.

**Worksystems ($489,153)** TrainOregon Project. Under this project, the workforce development boards implemented a statewide, customized online learning platform to train new and existing workers in...
employability and industry-specific technical skills. The project served 4,511 job seekers who accessed 5,729 courses and completed 2,582 courses. The project is currently piloting a service for incumbent workers called Train Oregon for Business. Usage has been steadily rising in 2017 and the sponsors expect that to continue.

Conclusion

It is imperative that Oregon invests in the ongoing skill development of its workforce. The 2017 Oregon Talent Plan recommends continued investment in skills development for the 307 occupations or approximately 500,000 jobs that have high multiplier effects, ranging from specialized production workers to advanced data scientists, accommodating a wide range of skill sets and post-secondary training requirements.

Across the country, state and local government, alongside industry and education, are taking a more active and focused role in continuous skills training. Different models are being used depending on what type of skills are needed, but a scan of successful models reveals a clear set of characteristics:

- **Industry-led.** Industry is involved in a meaningful way to design and deliver training and have a vested interest in a program’s success.
- **Applied.** Learning objectives are directly tied to job performance; goals benefit the success and bottom line for workers and organizations.
- **Competency-based.** Learner performance and knowledge acquisition are measured by demonstrated skill mastery, not program completion.
- **Flexible.** Program scheduling and delivery modalities are flexible to accommodate needs of the employed.
- **Culture of learning.** Company cultures are created that reward the value of continuous learning.

The most successful investments made by the Council in 2016-17 were those where industry was an active partner and driver of the work, and where the community, education and training organizations supported and were responsive to industry needs. The obvious industry-driven investments (MEDP, OMEP, Oregon Bio, TiE and RCC) all had this element, along with many other skill model characteristics.

Industry is a willing partner in this work and has shown that it will co-invest in programs, hire and mentor interns, develop internship programs, and reward continuous learning. Oregon needs to continue to help industry to do this, both by sharing the results and products of the Council’s investments and truly considering the 2017 Talent Plan recommendations.

Similarly, the partnerships between industry, education, workforce and training organizations supported by the Council’s investments are creating benefits beyond the number of students or workers served or trained, and beyond our initial industry and occupational priorities. The 15 colleges and universities who are now using the Handshake career services platform, often with a single staff person to connect students and employers, are now meeting regularly to learn from each other, share tips, and potentially collaborate on employer engagement. The OSU Pacific NW Electrical System Resiliency project has supported a partnership of three utilities and two institutions (OSU and PSU) that not only has increased training and experiential learning for power systems engineers, but appears to be supporting collaboration and learning that more broadly supports the utilities’ internal planning and preparation work.

Finally, while the Council’s priorities over the past two years evolved to focus more on incumbent worker training, it’s clear that the Council’s investments in higher education projects has helped to fill curriculum gaps, build and improve industry partnerships, and support the expansion of practical experience or internship opportunities. It’s not clear, however, that anyone will fill that gap in the near-term and make similar investments in or incent educational institutions to focus on incorporating the characteristics of successful skill training models, as recommended by the 2017 Plan.
2018-20 Oregon Talent Assessment

A Part of House Bill 3437 Implementation
HOUSE BILL 3437

- Requires that OWIB create a single, unified Workforce and Talent Development Plan every biennium in collaboration with key industries and State workforce stakeholders.

- Additional implications
WORKFORCE AND TALENT DEVELOPMENT PLAN

- Oregon Talent Assessment
- OWIB Strategic Plan
- Workforce and Talent Development Plan
- Local Workforce Development Board Plans
OREGON TALENT ASSESSMENT

- In-demand occupations and skills
- Current and future talent needs and gaps
- Voice of business and industry
- Includes public workforce system stakeholders
EXPECTED TIMELINE

- Complete procurement – December 2017
- Talent Summits – January 2018
- Business Engagement – January–March 2018
- Evaluation of Data – January–March 2018
- Complete and publish Talent Assessment – April–June 2018
NEW EDUCATIONAL AND TRAINING GOALS

HOUSE BILL 2311 IMPLEMENTATION
HOUSE BILL 2311

- Oregon’s 40-40-20 Goal
- Impact of HB 2311
- Joint OWIB and HECC workgroup
NEW EDUCATION AND TRAINING GOAL

• Oregonians not enrolled in secondary or post-secondary education and training
• Connected to current and future job opportunities
• Designed to promote labor market success
• Provides a “North Star” for the Workforce and Talent Development Plan
KEY PROJECT ELEMENTS

• Joint OWIB-HECC Workgroup’s charge
• Business and industry engagement
• Public workforce system engagement
• Joint development project with the Oregon Talent Assessment
EXPECTED TIMELINE

• Form and Initiate Joint OWIB-HECC Committee – December 2017
• Talent Summits – January 2018
• Evaluation of Data – October 2017–March 2018
• Business Engagement – January–March 2018
• Develop and publish new education and training goal – April-June 2018
Discussion on Talent Development Priorities

Prior to the tour, you heard a high-level overview of developments and trends in particular industries and businesses. You also heard about workforce strategies and solutions that address business workforce needs. As you break into small groups, please consider these questions to prompt a discussion. Your goal is to identify two to three talent development priorities. In the report-out, please share your group’s top priority.

1. What are the key workforce and talent development issues in your organization?
2. What are some best practices you’re using to address these issues? Why are these solutions working?
3. What opportunities and challenges do you face with the current and future workforce issues around education, training and talent pipeline development?