Oregon job growth outpacing the nation’s

Change in Nonfarm Employment Since June 2009,
(Indexed June 2009 = 100)

Source: Federal Reserve Bank of St. Louis, FRED
Productivity gains outpacing the nation’s

Average Annual Percent Change in Labor Productivity, 2007-2017

Source: U.S. Bureau of Labor Statistics
Wage gains show a relationship to job growth

Low-wage occupations have higher wage growth

Employers’ Perspective
Survey asked executives to assess Oregon business conditions on a range of factors (e.g., taxes, regulatory policy, quality of life, skilled labor)

469 senior executives (CEOs, presidents, CFOs, COOs, vice presidents) responded to the survey during August-September 2019

Executives represented a wide range of local- and traded-sector industries
Employers have mixed views on the condition of the labor force

Share of survey respondents indicating that each element is a competitive strength for Oregon, by region, September 2019

<table>
<thead>
<tr>
<th>Region</th>
<th>Skilled Labor</th>
<th>Quality Innovation, Scientists, Engineers</th>
<th>Well-connected Universities</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDX</td>
<td>26%</td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Willamette Valley</td>
<td>23%</td>
<td>52%</td>
<td>60%</td>
</tr>
<tr>
<td>Rest of State</td>
<td>15%</td>
<td>34%</td>
<td>55%</td>
</tr>
</tbody>
</table>

Source: Oregon Business Council Business Climate Survey, 2019
Employers have mixed views on the condition of the labor force

Share of survey respondents indicating that each element is a competitive strength for Oregon, by firm size, September 2019

Source: Oregon Business Council Business Climate Survey, 2019
Automation is not the only mega-trend

Share of the Workforce Aged 55 and Older, 2019

Source: QWI Explorer application, U.S. Census Bureau
Automation is not the only mega-trend

Share of the Workforce Aged 55 and Older, 2019

Source: QWI Explorer application, U.S. Census Bureau
Technology will progress but has questions to answer.

What should the self-driving car do?

Source: http://moralmachine.mit.edu
Opportunities declining for non-college **men** in metro areas

![Graph showing production and administrative and clerical employment for non-college men from 1970 to 2015.](image)

Source: Autor, David. *Work of the Past, Work of the Future*
Opportunities declining for non-college women in metro areas

Source: Autor, David. *Work of the Past, Work of the Future*
Frontier work pays 30% above average

Source: Autor, David. *Work of the Past, Work of the Future*
Last-mile work pays 20% below average

Source: Autor, David. *Work of the Past, Work of the Future*
Wealth work pays at about the average

Source: Autor, David. *Work of the Past, Work of the Future*
Low-wage workers fall into nine clusters

1. Ages 18-24 not in school, no college degree
2. Ages 18-24 in school, no college degree
3. Ages 18-24, with an associate degree or more
4. Ages 25-50, with a high school diploma or less
5. Ages 25-50, with some college but no degree
6. Ages 25-50, with an associate degree or more
7. Ages 51-64, with a high school diploma or less
8. Ages 51-64, with some college but no degree
9. Ages 51-64, with an associate degree or more

Source: Ross, Martha and Bateman, Nicole. “Meet the Low-wage Workforce.” Brookings Metropolitan Policy Program. November 2019
Characteristics of low-wage workers vary across geography

Percent of metro area’s workers who have low wages, by cluster, 2016

Source: Ross, Martha and Bateman, Nicole. “Meet the Low-wage Workforce.” Brookings Metropolitan Policy Program. November 2019
Characteristics of low-wage workers vary across geography

Percent of metro area’s workers who have low wages, by cluster, 2016

Source: Ross, Martha and Bateman, Nicole. “Meet the Low-wage Workforce.” Brookings Metropolitan Policy Program. November 2019
People from underserved populations disproportionately perform low-wage work

Characteristics of low-wage workers versus mid- to high-wage workers in Oregon metro areas, 2016

Source: Ross, Martha and Bateman, Nicole. “Meet the Low-wage Workforce.” Brookings Metropolitan Policy Program. November 2019
Training for Work for the Future
Plan and Pay for College

Improve access through better information and technology
## Center on Education and the Workforce

<table>
<thead>
<tr>
<th>Institution</th>
<th>State</th>
<th>Level</th>
<th>Predominant degree</th>
<th>Institution type</th>
<th>Average age at entry</th>
<th>10-year NPV</th>
<th>10-year NPV rank</th>
<th>15-year NPV</th>
<th>15-year NPV rank</th>
<th>20-year NPV</th>
<th>20-year NPV rank</th>
<th>30-year NPV</th>
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Source: https://cew.georgetown.edu/cew-reports/collegeroi/

### Improve access through better information and technology
Scale practices that document and certify skills
Scale practices that document and certify skills

Source: The Credential Engine
Expand apprenticeships
Oregon talent has supported one of the better job recoveries during this expansion, and productivity gains look good.

But the view of executives on talent is decidedly mixed—some satisfaction at the high-end and strong concerns elsewhere.

One clear competitive advantage: we expect talent to continue to move here.
Job quality could be a bigger concern than job quantity given the aging of the workforce.
40-40-20 is the most ambitious postsecondary goal in the United States, and trends in technology justify it.

The highest-in-the-nation-goal has driven innovation in the “middle 40”. Oregon appears to be ahead in the postsecondary redesign game. Staying on the frontier of postsecondary design work is an imperative.
The changing geography of work has reduced opportunities for non-college graduates in metro areas and leaves Oregon’s smaller cities and towns as the best alternatives for some workers. That puts more pressure on economic developers, policymakers, and business leaders—especially in the service sector—to create good jobs across the state.
December 6, 2019
12:00pm – 4:00pm
Career & Technical Education Center (CTEC)
3501 Portland Road, NE
Salem, OR 97301
To listen, call: 877-810-9415 Access Code 9550046

MEETING MINUTES

Members Present: Rod Belisle, Craig Campbell, Jody Christensen, Bridget Dazey, Sen. Michael Dembrow (phone), Patty Dorroh (phone), Shari Dunn (phone), Ken Madden (Chair), Andrew McGough (phone), Anne Mersereau (Vice-Chair), Tony Frazier, Alex Lemieux, Julie Lewis (phone), Keith Ozols, Jimmy Swanson, Debbie Radie, Cathy Reynolds, Rhonda Rhodes, Sen. Kim Thatcher, Chelsea Watson (phone)

Members Excused: Mark Mitsui (Katie – PCC staff is sitting in for President Mitsui via phone)

Technical Advisors and Staff Present: Dan Haun, Karen Humelbaugh, Sydney King, Clay Martin, Todd Nell, Julia Steinberger

Standing Business

1.0 Preliminary and Organizational Business

1.1 The meeting began at 12:08pm with a tour of the Career and Technical Education Center. Rhonda Rhodes, the principal of CTEC, introduced the students leading the tour and some history of the school. Chair Madden brought the meeting to order at 1:05pm.
2.0 Public Comment

Each Individual/Group will have a time limit of three minutes

2.1 No public comment.

3.0 Consent Agenda

3.1 Chair Madden requested a motion to approve the consent agenda.

ACTION: Vice-Chair Mersereau moved and Rod Belisle seconded. Motion passed, consent agenda approved. ACTION: Vice-Chair Mersereau moved to approve support for the OWP Equity Action Partners Legislative Flyer, Rod Belisle seconded. Motion passed.

Workforce Development System

4.0 WTDB Leadership

4.1 Education and Policy Advisor to Governor Brown, Lindsey Capps, presented to the board on his subject matter and how it relates to WTDB. He opened up the discussion to include what the state could do to support this work more broadly. This presentation took a question and answer format. There was discussion around the connections between education and workforce and how to better align them.

4.2 The True Wage Taskforce completed their final report. The True Wage Taskforce was created to build awareness to what the true living wage is to reach self-sufficiency for the workforce. They took many things into consideration, child care and housing were the two areas that rose to the surface as being very challenging barriers in trying to reach self-sufficiency for workers in Oregon. This work will hopefully bring these factors to light for employers on how to help their workforce. ACTION: Shari Dunn motioned to approve the True Wage Final Report. Vice-Chair seconded. Motion passed.

4.3 Rod Belisle presented for the Licensing Taskforce. The Licensing Taskforce looks into what it takes for the workforce to gain licensure for various job requirements. The board discussed, and suggested that Oregon could be less restrictive on what these licenses require. This would allow more accessibility for eligibility for these licenses. Discussion ensued around this topic.

4.4 Director Todd Nell presented on behalf of the Artificial Intelligence Taskforce, as both Venkat and Mark Mitsui were unable to attend today’s meeting. This taskforce is looking into how to better understand the challenges and opportunities in the changing economy.

Director Todd Nell also took this time to present his Director’s Report. He reminded everyone that the 2020 WTDB Talent Summit is coming...
up on March 9th, 2020. Staff has been updating the membership handbooks, and will have a completed version for board members soon. Staff also has created a biography packet, members were asked to review and send in any changes and a photograph to better help members know who they serve on the WTDB with.

4.5 Director of the Office of Workforce Investments, Karen Humelbaugh presented the progress of the Adult Learning Advisory Committee (ALAC), that she is a part of. They are still undertaking this work, and have created a year-long plan. Shari Dunn is a co-chair of that committee with co-chair Terry Cross of HECC and was thanked for her work for ALAC.

Promising Practices

5.0 Youth Programs

6.1 Brent Parton spoke on behalf of New America, of which he is Deputy Director. New America focuses on k-12, higher education and workforce. He presented on a program he has been working on and with, Partnership to Advance Youth Apprenticeships (PAYA). The four main branches are, Advanced Manufacturing, IT, Healthcare and Professional Services. The 2-4 years that it takes to earn the credential is concurrent with workforce requirements. This allows for the student to join the workforce right away. This program is wildly popular in its flagship year. They received over 250 applications, and were only able to give out 9 grants.

Travis Reiman joined Brent Parton in presenting, and is Assistant Superintendent for Hillsboro High School. He brought the Talent Gap Analysis to light. Their school is made up by 52% youth of color, and 48% white youth. They have made huge strides in CTE work. Providing these training programs are issues that are hindering the youth, and Travis is committed to making it easier for youth to access these resources.

6.2 Elaine Phillipi presented for In 4 All, a 35-year-old non-profit organization of which she is the Executive Director. They act as a convener between education and workforce. She expressed that pathways to workforce opportunities need to be malleable, and that career paths have the ability to change.

6.3 Myronda Schilling spoke about the Northwest STEM Hub – its history, her involvement and what it does for students. The Northwest STEM Hub provides integrated learning and diverse educator pathways that enhance educators knowledge, which they can pass along to students. Oregon Manufacturing Innovation Center provides the work for the
students, and Portland Community College provides the education piece. These partnerships are what make the Northwest STEM Hub so successful. They have provided numerous grants throughout the region this year.

**Local Workforce Boards**

<table>
<thead>
<tr>
<th>6.0</th>
<th>Designations</th>
</tr>
</thead>
<tbody>
<tr>
<td>6.1</td>
<td>Due to running over on time, Karen Humelbaugh was not able to present on Local Workforce Board Designations. She did, however, encourage everyone to look at the provided materials and she will update during the next meeting.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>7.0</th>
<th>Adjourn</th>
</tr>
</thead>
<tbody>
<tr>
<td>7.1</td>
<td>Chair Madden adjourned the meeting at 4:05pm.</td>
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</tbody>
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Workforce & Talent Development Board
Artificial Intelligence Taskforce

MINUTES
December 17, 2019
11:00pm – 12:30pm
PCC Sylvania Campus
12000 SW 49th St
Portland, OR 97219

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

MEETING MINUTES

Members Present
Matt Abrahams (phone), Todd Nell, Fred Pool, Mark McPherson, KS Venkatraman, Nagi Naganathan, Mark Mitsui, Jim Piro, Bridget Dazey, Nick Insalata, Xubo Song, Soundharya Nagasubramian (phone)

Members Excused
Sabrina Parsons, Bryan Guiney, Matt Abrams

Staff Present
Todd Nell, Sydney King (minutes by phone)

Standing Business

1.0 Preliminary and Organizational Business

1.1 Co-Chairs Mitsui and Venkatraman brought meeting to order at 11:03am. Director Nell presented a review of last meeting. Based on last meeting, votes from K-12 and STEM advocates need to be included in the group. Chairs Mitsui and Venkat, and Director Nell reached out to Rhonda Rhodes and Myronda Schiding to join the AI taskforce. Director Nell confident Rhodes and Schiding will join.

1.2 Mitsui, Venkat and Nell sent email out to legislators asking for their engagement for representation for this taskforce. Discussion of the group engaged the members in strategizing how to get legislative engagement.

1.3 Members spoke to and discussed how AI will affect the future of work, education and the affect it will have on the various career pathways.

2.0 Public Comment

All members of the public will have a time limit of 3 minutes to speak.

2.1 No public comment

3.0 Consent Agenda

3.1 Bridget Dazey motioned to approve the AI Meeting Minutes from last meeting, 11/6/19. Unanimous. Motion passed.

3.2 Director Nell revised Charter based on agreed to edits at previous AI TF meeting. Venkat motioned to approve AI Taskforce Charter with amendments. Passed unanimously. A member requested to add public stakeholder and K-12 education.
4.0 Leadership

4.1 Director Nell provided brief update on status of taskforce work and membership. Members strategized how to identify youth and encourage programs of study that reflect their interests regarding this work.

4.2 Fred Pool and Jim Piro talked about Knight Campus for Accelerating Scientific Impact and a recent Leadership Meeting at World Trade Center.

5.0 Planning and Execution

5.1 The taskforce discussed how to incorporate other workgroups, educators, schools and programs into taskforce work. Mitsui touched on importance of pathways into community colleges and universities that lead to good jobs. Need to keep Diversity and Inclusion at top of mind. Group determined that presentations from key partners, key sectors and stakeholders were needed. Nell will pull preliminary list together and facilitate speakers/discussions at future meetings. Group agreed that this strategy will generate thoughtful questions and clarity for the taskforce to move forward and achieve agreed to deliverables called out in charter.

Discussion ensued on potential legislative membership. Numerous members agreed they would check their networks for possible house and/or senate representation on taskforce. Dr. Nagi suggested that we might want the AI taskforce to become a Governor’s initiative. Dazey suggested macro funding strategy for funding tied to the taskforce’s Final Report recommendations. This strategy would include multiple federal and state agency and program resources like Pell, WIOA, Perkins, STEP, etc. The HECC, OBC and OIT outcomes funding model was also discussed.

Mitsui noted that we need to focus on why AI is important, who are we trying to impact, which stakeholders should be involved, which jobs are likely to go away and what do about it, who will be impacted, etc. Then, what will we do and how. Make policy recommendations including, potentially the how.

ACTION STEPS: Director Nell committed to connecting with the key partners and stakeholders discussed to initially include Technology Association of Oregon, OED Research and K12 for next meeting.

10.0 Adjourn

Meeting adjourned 12:43pm.
Workforce Talent and Development Board (WTDB)

Meeting Minutes

Artificial Intelligence Taskforce
March 3, 2020
9-10:30

PCC Sylvania
CC 233B
12000 SW 49th Ave,
Portland, OR 97210

Call In: 877-810-9415; Access Code: 9550046

WTDB Imperatives:
1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient, Adaptable and Flexible to a Changing Economy

Members Present: Bridget Dazey, Mark Mitsui, KS Venkatraman (by phone), Jim Piro, Nick Insalata, Bryan Guiney, Mark McPherson, Rhonda Rhodes (phone)

Members Not Present: Soundharya Nagasubramian, Sabrina Parsons, Laurie Cremona Wagner, Xubo Song, Matt Abrams, Myronda Schiding and Fred Pool

Todd Nell, Sydney King and Clay Martin

Standing Business

9:00 1.0 Preliminary and Organizational Business
1.1 Meeting was called to order at 10:41am. Co-Chair Mitsui

2.0 Public Comment
2.1 None.

3.0 Consent Agenda
3.1 ACTION ITEM: Approve 1/24/2020 AI Taskforce Minutes. Bridget Dazey motioned to approve the minutes, Jim Piro seconded, motion passed, minutes approved.

Strategic Board Leadership

9:15 4.0 Updates & Discussion
4.1 Jim Piro reported out on the energy industry, specifically PGE, and their data analytics team with whom he had recently met. He also spoke about the utility industry, and how artificial intelligence aids the data security of the nation’s electric grid every day.

9:35 4.2 Laura Burney Nissen, a social worker and futurist, presented on futurism, and how artificial
intelligence is shaping this work. Several taskforce members had questions, and a discussion around its impact on displaced workers, the automation of medical care, and other important topics affected by AI ensued.

9:55  4.3  Co-Chair Mark Mitsui presented to the taskforce as a representative of the post-secondary sector with a lens of “how to help the community” in mind. He spoke to the scope of work that artificial intelligence will introduce to the workforce, and how to train students for this upcoming challenge. At PCC, 2/3 of college students have experienced food or housing insecurity, and the belief here is to double down on the basics, and supply these fundamental needs for students. Discussion around this topic ensued.

5.0  Discussion, Updates & Next Steps  

The taskforce went over the draft outline of the AI Report for the Governor and the legislature and made suggestions and edits to the document, as to prepare it as draft for presentation at the June WTDB meeting.

5.0  Adjourn  

Co-Chair Mitsui adjourned the meeting at 10:29am.
Workforce Talent and Development Board (WTDB)

Meeting Minutes

Executive Committee
January 15, 2020
1:30-3:00

Oregon Employment Department (OED)
3rd Floor, Dave Pleasant Conference Room
875 Union Street NE, Salem, OR 97311

Call In: 877-810-9415; Access Code: 9550046

WTDB Imperatives:
1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient, Adaptable and Flexible to a Changing Economy

Members Present: Ken Madden (phone), Anne Mersereau (phone), Rod Belisle, Bridget Dazey, Shari Dunn, Kay Erickson, Alix Hubert (training), Melinda Rogers, Jimmy Swanson (phone)

Members Not Present: Lindsey Capps, Ben Cannon, Patty Dorroh, Doug Hunt, Mark Mitsui, Soundharya Nagasubramian, KS Venkatraman

Staff Present: Karen Humelbaugh, Todd Nell, Sydney King, Clay Martin

Standing Business

1:30 1.0 Preliminary and Organizational Business
1.1 Meeting was called to order at 1:38pm. Chair Madden

1:35 2.0 Public Comment
2.1 None.

3.0 Consent Agenda
3.1 No consent agenda, caught up on minute approvals, next meeting should expect this meeting’s minutes as well as by-laws adjustments.

Strategic Board Leadership
1:40 4.0 Strategic Plan
4.1 The Strategic Plan was approved by the board on 9/13 with 1 adjustment. This was approved with the addition. The back of the Strategic Plan has a list of definitions on the back, highlighted in red. Words in red are subject to change.

ACTION ITEM: Approve Strategic Plan Definitions.
Members:
Ken Madden, Chair  
Anne Mersereau, Vice Chair  
Rod Belisle  
Lindsey Capps  
Bridget Dazey  
Patty Dorroh  
Shari Dunn  
Doug Hunt  
Mark Mitsui  
Soundharya Nagasubramian  
Melinda Rogers  
Jimmy Swanson  
KS Venkatraman

Non-Voting Members:  
Ben Cannon  
Kay Erickson

Staff:  
Karen Humelbaugh  
Sydney King  
Clay Martin  
Todd Nell

Vice Chair Mersereau motioned to approve the Strategic Plan with updated definitions and measurements. Rod Belisle seconded, Jimmy Swanson third. None opposed.

4.2 Imperative Teams are an effort to keep the board accountable. There are 5 imperatives that are represented by 5 different teams. All teams have met except for Team 1, due to scheduling conflicts. It is important to create a baseline to measure against moving forward. It was suggested that 2020 is used as the baseline year.

An idea surfaced to engage a consultant to assist employers in understanding how to better plug in to the workforce via a communications plan.

Kay Erickson suggested creating a visual tool and displaying this on the webpage.

<table>
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<tr>
<th>2:00</th>
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<th>Taskforce Updates</th>
<th>Chairs</th>
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<tr>
<td>5.1</td>
<td>Essential Employability Skills Taskforce will be stood up and staffed soon.</td>
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True Wage Taskforce is winding down. The True Wage Taskforce has confirmation from the State that the State will take on some of the cost of the “True Wage Calculator”. It was brought up that Worksystems has a “Prosperity Planner” that could serve as True Wage Calculator.

Licensing Taskforce is narrowing focus on the scope of their project. They sent out a survey to help narrow the scope. This provides feedback from people affected by licensure and lack thereof. The Committee discussed issues around licensure and thoughts on the matter. It will likely be that a web taskforce is created and work be moved into that committee.

Special Business

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<th>2:15</th>
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<th>Strategic Innovation Grants</th>
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Workforce Talent and Development Board (WTDB)

Funding was secured last biennium. This funding was awarded to certain local workforce boards determined through a competitive grant process.

**Members:**
- Ken Madden, Chair
- Anne Mersereau, Vice Chair
- Rod Belisle
- Lindsey Capps
- Bridget Dazey
- Patty Dorroh
- Shari Dunn
- Doug Hunt
- Mark Mitsui
- Soundharya Nagasubramian
- Melinda Rogers
- Jimmy Swanson
- KS Venkatraman

As a group, the WTDB has decided to offer these competitive grants to other entities that are interested and want to apply.

**Non-Voting Members:**
- Ben Cannon
- Kay Erickson

**Staff:**
- Todd Nell
- Karen Humelbaugh
- Sydney King
- Clay Martin

**ACTION ITEM:** Melinda motioned to broaden the scope of potential grantees from local workforce boards to non-profits and other interested parties. Vice Chair Mersereau seconded. Board members Shari Dunn and Bridget Dazey recused themselves from the vote.

<table>
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<tr>
<th>Time</th>
<th>Section</th>
<th>Description</th>
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<td>2:20</td>
<td>Legislative Strategy Discussion</td>
<td>Karen went over some legislative 101 for the board members. Later there was discussion around how the board is empowered to reach out, and ways to do so.</td>
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**Next Steps**

The board was asked to provide staff feedback and priorities on legislative groups.

The board asked for 1-pagers and talking points for potential discussions with legislators.

Meeting adjourned at 3:16pm
Workforce and Talent Development Board (WTDB)

Members:
Ken Madden, Chair
Anne Mersereau, Vice Chair
Rod Belisle
Bridget Dazey
Patty Dorroh
Shari Dunn
Doug Hunt
Mark Mitsui
Soundharya Nagasubramian
Melinda Rogers
Jimmy Swanson
KS Venkatraman

Non-Voting Members:
Ben Cannon
Kay Erickson

Staff:
Todd Nell
Sydney King
Clay Martin

Meeting Minutes

Executive Committee
March 3, 2020
1:30-3:00

PCC Sylvania
CC 233B
12000 SW 49th Ave,
Portland, OR 97210

Call In: 877-810-9415; Access Code: 9550046

WTDB Imperatives:
1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient, Adaptable and Flexible to a Changing Economy

Members Present: Ken Madden, Anne Mersereau (phone), Mark Mitsui, Rod Belisle, Bridget Dazey, Shari Dunn, Kay Erickson (phone), Jimmy Swanson (phone)


Staff: Todd Nell, Sydney King, Clay Martin

Standing Business
10:30 1.0 Preliminary and Organizational Business

1.1 Meeting was called to order at 10:41am. Chair Madden

10:35 2.0 Public Comment
2.1 None.

3.0 Consent Agenda
3.1 Shari Dunn motioned to pass the Executive Committee Minutes from 1-15-20, Rod seconded, motion passed, minutes approved.

By-laws were reviewed and it was decided additional review and language revisions needed before put to a vote.

Strategic Board Leadership
### Workforce and Talent Development Board (WTDB)

#### 4.0 Updates & Discussion

| 4.1  | National Governor’s Association update by Chair Madden and Todd Nell, both described key components of the NGA Winter Meeting in DC and mentioned they were given a tour of the Mexican Embassy and cultural center. | Ken Madden |
|      | Todd spoke about an invitation that was received recently from Brent Parton, who spoke at the Dec. 2019 board meeting, from PAYA, to join them at a conference in South Carolina at the end of the month. This sparked a discussion around youth apprenticeships. These conversations included a strategy to reach out to BOLI, registered apprenticeships and how ADECO works with them, and the importance of industry sectors adopting apprenticeship programs. | |
| 4.2  | Mark Mitsui reported out on the Artificial Intelligence Taskforce. He spoke about the guest that had just presented at AI Taskforce meeting, a social worker and futurist, Laurie Nissen from PSU. He elaborated on her presentation and how it relates to the AI field. | Mark Mitsui, Rod Belisle, Shari Dunn |
|      | Rod reported on Licensing Taskforce, mentioning that they have decided to re-evaluate the work of this taskforce, and that it will later be absorbed into another taskforce. | |
|      | Shari spoke about the True Wage Taskforce, and that is wrapping up, they have a drafted letter to send to the Governor with recommendations from their findings. | |
| 4.3  | The imperative teams are a part of the strategic plan developed with Corragio. Per the contract with Corragio, they are to check in with Exec. Team quarterly, and make sure they are on track. Michelle could not make this meeting, but has checked in with Todd and intends to attend the next meetings. | Todd Nell |
| 4.4  | Todd updated the committee on the Talent Summit on March 9th, in Portland, OR. The Talent Assessment will be released at this event, to be approved by the board the following Friday. | Todd Nell |
| 4.5  | The committee went over the agenda for March 13. | All |
| 4.6  | There are 18 submissions for the Innovation Grants, and the committee discussed how to develop a process around reviewing them. | Todd Nell |
| 4.7  | Clay reported on the State Plan. It is still available for public comment, and there is a large section dedicated to | Clay Martin |
Workforce and Talent Development Board (WTDB)

compliance. In an effort to continuously improve, he would like to start earlier next year so the process is not as rushed.

5.0 Adjourn
Meeting adjourned at 12:24pm by Chair Madden.  

Ken Madden
Docket Item: 4.3 True Wage Taskforce

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:

- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

Strategic Plan Imperatives:

1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy

Summary:

The current economic boom has resulted in record levels of employment and economic success for numerous Oregonians, yet for way too many they have been left behind and struggle with the affordability of daily life. The True-Wage Taskforce has sought to better understand and inform solutions.

Over the past several months, members of the Taskforce have pivoted from focusing on a potential redefinition of High-Wage to tackling this notion of True-Wage. True Wage, at a high level, is about employment that results in self-sufficiency. Housing, Childcare, Healthcare, Student Debt and Transportation Costs are clearly significant issues that impact True-Wage solutions. Of key importance, is the focus of limited public resources on occupations that are both important to Oregon’s economy and result in at least self-sufficient compensation and benefits, directly or over time, through a career pathway.

The group has reviewed, discussed and strategized on information and data provided by numerous sources including the Oregon Employment Department’s Research Division, the US Department of
HIGHER EDUCATION COORDINATING COMMISSION  
WORKFORCE AND TALENT DEVELOPMENT BOARD  
March 13, 2020  
Docket Item 4.3

Housing and Urban Development, other state's best practices, Work Systems on the Prosperity Planner, Lane Workforce Partnership on the Alice Report, the Department of Education's Early Learning Division, and many others.

The goal of the taskforce work has been to identify and prioritize barriers, opportunities and ultimately provide solid recommendations in its final report to the WTDB. These solutions aspire to increase systems and resource alignment while concurrently meeting the True-Wage related imperatives, objectives and initiatives outlined in our 2020-2021 WTDB Strategic Plan. The letter attached to this docket item transmits the True-Wage Taskforce’s recommendations to Governor Brown.

Docket Material:

March 2 True Wage Letter to the Governor

Staff Recommendation:

Approve the March 2 True Wage Letter to the Governor
March 2, 2020

Dear Governor Brown,

One of the primary duties of the Workforce and Talent Development Board (WTDB) is to assist you and your policy advisors through the creation and subsequent use of the WTDB Strategic Plan as a guiding document for the Oregon Workforce Development System in Oregon.

We are excited to say that our first-ever, one-page WTDB Strategic Plan (2020-2021) was developed over the Summer and early Fall of 2019 and is now live. The WTDB’s vision is Equitable Prosperity for all Oregonians. Our mission is to advance Oregon through meaningful work, training and education by empowering people and employers.

To fulfill this mission, we continue to research and analyze priority components of the workforce system that are in the strategic plan for potential improvement. Much of this good work is being done through our taskforce structure which includes the Artificial Intelligence, Licensing, Essential Employability Skills and True Wage Taskforces.

The True Wage Taskforce is led by Shari Dunn, Executive Director of Dress for Success, and has had notable success over the past several months exploring obstacles, issues and potential solutions around the true cost of self-sufficiency, including key issues like workforce childcare and workforce housing.

Four recommendations have come from the True Wage Taskforce. These recommendations were approved by the WTDB to be sent on to you for your review and, in some instances, as a call to action. They include:

1. **Explore potential investments in, and enhancement of, the Self Sufficiency Report and the Prosperity Planner (fact sheet attached) as required by 2020-2021 WTDB Strategic Plan.**

   The Self-Sufficiency Report is a statewide resource for a number of efforts. It is currently produced under the leadership of Dr. Pearce, Senior Lecturer and Director of the Center for Women’s Welfare at the University of Washington. With the right communications approach, we believe it provides a great opportunity to work with other state agencies and local partners to find meaningful solutions around true self sufficiency in a more cost-effective and efficient way.

   We have explored the potential return on this investment and believe it to be high, particularly for Oregonians who are low income and from communities of color, whether they live in rural or metro areas. Our collective WTDB efforts have resulted in securing funding from the HECC’s Office of Workforce Investments (OWI) to move this work forward! We will be entering into a contract with the University of Washington over the next several months. Please connect with us with suggestions on what the board can do regarding any current work or planned work around partnership strategies and opportunities that could leverage funding streams and outcomes.

2. **Build awareness on the True Cost of self-sufficiency by providing community, workers, and employers with a better understanding of the reality of what self-sufficiency really means.**
The WTDB will continue to explore additional and expanded online resources via business/employer partnerships that can help address current and future self-sufficiency challenges.

We have secured funding from the HECC and Office of Workforce Investments to hire a consultant to lead initial efforts on the development of a Communications Strategy and Plan to help build the collective awareness of the workforce system in Oregon. If there are key people or partners you believe should be a part of this work, please let us know.

3. **Develop policy and innovative investment recommendations for the Governor and legislature around childcare for the workforce and potentially for those working in childcare.**

   The taskforce recommends that you establish a taskforce comprised of private and public sector leaders to develop, fund and implement a public-private pilot program (Childcare Co-Operative) to expand access to affordable, quality childcare for Oregon’s workforce.

4. **Develop policy and investment recommendations to you and the legislature focused on workforce housing without negatively impacting affordable housing resources for low-income individuals.**

   The WTDB and True Wage Taskforce recommend tapping into the expertise of our members, from business, state and local government and non-profits, to partner with us in order to support your efforts on the $5M Greater Oregon Housing Accelerator fund and with other efforts.

Thank you for your interest in the Workforce and Talent Development Board and for all that you do for Oregon and our citizens!

Kind regards,

Ken Madden
Ken Madden, Chair, WTDB
Owner
Madden Industrial Craftsmen

Anne Mersereau, Vice Chair, WTDB
VP, Human Resources, Diversity & Inclusion
Portland General Electric

Shari Dunn
Shari Dunn, Chair, True Wage Taskforce
Executive Director
Dress for Success
Docket Item: 4.6 Adult Learner Advisory Committee

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:

- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

Strategic Plan Goals:

1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy

Summary:

Oregon House Bill 2311 (2017) directed the Higher Education Coordinating Commission (HECC) and the Workforce and Talent Development Board (WTDB) to establish a statewide educational attainment goal for adult Oregonians separate from 40-40-20. The HECC and WTDB convened the Adult Attainment Workgroup who recommended the following statewide adult attainment goal:

Oregon anticipates more than 120,000 additional jobs requiring post-secondary training or education between now and 2030. In order to meet this need, 300,000 additional adult Oregonians should earn a new degree, certificate, or credential valued in the workforce during that time. Because Oregon has substantial attainment gaps among minority, low income, and rural Oregonians, the state will also commit to reducing those attainment gaps by half during the decade.

The HECC adopted the Workgroup’s recommended Adult Attainment Goal in November 2018. The Goal applies to adults 25 to 64 years old who not currently enrolled in a high school equivalency program, an institution of higher education, or another post-secondary training program.
The broader purpose of the Adult Attainment Goal is to drive improvements in Oregon’s educational and workforce systems. In order to improve the state and the lives of Oregonians, strategies must be developed to help adult Oregonians increase their skills, especially those who have been on the sidelines of the economic recovery. A broad and inclusive approach to both how people gain skills, in addition to who gains skills is also needed. The future prosperity of Oregon depends on innovative and inclusive approaches to skill and talent development for adults from all backgrounds, skill levels, and regions of the state.

**Docket Material:**

[Adult Attainment Goal](#)

**Staff Recommendation:**

This is an information item. No action required.
HOUSE BILL 2311:
Establishing Oregon’s Adult Attainment Goal
BACKGROUND: HOUSE BILL 2311 (2017)

In 2011, the State of Oregon adopted one of the highest-reaching state goals for education in the country: “40-40-20.” This goal established a clear target against which to gauge the state’s educational progress, stating the aspiration that by 2025, 40 percent of Oregonians will complete a bachelor’s or graduate degree, 40 percent will complete an associate’s degree, certificate, apprenticeship, or other postsecondary credential, and the remaining 20 percent will earn a high school diploma or the equivalent.

House Bill 2311, signed into law in 2017, aligns state statute with how the 40-40-20 goal has been most commonly understood since its inception: as reflecting the need to improve P-20 educational outcomes for today’s younger learners, ensuring that they enter adulthood ready and able to succeed in Oregon’s economy and civic life. At the same time, HB 2311 reinforces the state’s commitment to ambitious educational outcomes for working-age adult Oregonians. Specifically, it requires the Higher Education Coordinating Commission (HECC), in coordination with the Workforce and Talent Development Board (WTDB), to development a new, parallel goal for the adult population not currently enrolled in a kindergarten through grade 12 school, an institution of higher education or another post-secondary training program. This goal must be aligned with career trajectories, education interests, and job opportunities.

GOAL-SETTING

ADULT ATTAINMENT WORKGROUP

To execute HB 2311’s charge, the HECC and the WTDB recognized that their partners in postsecondary education, business, and industry would be vital both to the development of a meaningful and actionable goal, and to the achievement of that goal. As a result, they formed an Adult Attainment Workgroup of key stakeholders to develop and recommend to the HECC and WTDB a statewide adult attainment goal. The Adult Attainment Workgroup included representatives of:

- The HECC
- The WTDB
- The Governor’s Office
- Business & Industry
- Local workforce investment boards
- Work-based training
- Community colleges
- Public universities
- Private postsecondary

The Adult Attainment Workgroup met four times between December 2017 and September 2018, discussing research and data provided by HECC staff and partner organizations, as well as workgroup members’ experiences and perspectives.

PARAMETERS AND STRUCTURE

Before agreeing to a final goal, the Adult Attainment Workgroup needed to answer a number of questions related to the parameters and structure of the goal.
Defining “adult”

First, the Workgroup focused on defining “adult” for the purposes of Oregon’s educational attainment goal for adult Oregonians. The Workgroup discussed options ranging from age 25-34 to age 18 and up. Ultimately, members expressed a desire for a wide age range and one that was distinct from Oregon’s existing 40-40-20 goal. Thus, the Workgroup agreed that, for the purposes of this goal, “adult” means age 25-64.

Defining “attainment”

The Workgroup also needed to clarify what counts as “educational attainment” for the purposes of this goal. They decided that the goal should be set in terms of “credentials of value” earned by adult Oregonians, and defined “credential of value as one that (a) adds value for employees and employers, (b) has measurable metrics, (c) leads to a family-wage job, and (d) is transferable.

Credentials that certainly count under this definition include certificates and degrees awarded by accredited colleges and universities, registered apprenticeships, and on-the-job training approved by workforce boards. Additional credentials such as industry recognized credentials, badges or other micro-credentials, or non-registered apprenticeship programs will be evaluated according to the criteria above and may be added to the definition.

Equity component

The Workgroup was committed to including an equity component in the goal, with the intention of ensuring that efforts to achieve the goal would prioritize underrepresented populations. The Workgroup determined that, to keep consistent with other HECC initiatives, it would use the language from the HECC Equity Lens\(^1\) and focus on underrepresented racial/ethnic minority, low-income, and rural Oregonians. Increasing educational attainment among adult Oregonians without addressing inequity is out of alignment with the agency’s mission.

Goal structure

Finally, the Workgroup discussed in what terms the goal should be expressed. Should the goal reflect 40-40-20 and be expressed in terms of percentages? Should it cite a specific number of degrees earned by adults above current projects? And what is the timeline for the goal? The Workgroup agreed to the following goal structure:

“By year X, Y adult Oregonians, Z of whom are from underrepresented populations, will earn a new postsecondary credential of value.”

To fill in the X, Y, and Z variables of the goal structure, the Workgroup looked to the HECC and its partners for data analysis.

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DATA ANALYSIS

The HECC’s Office of Research and Data collected, analyzed, and presented to the Adult Attainment Workgroup data on degree and certificate completion rates, workforce need, and attainment gaps among underrepresented racial/ethnic minority, low-income, and rural Oregonians.

Key data analyses are included in the charts below.

Chart 1: Credential Production and Workforce Demand

<table>
<thead>
<tr>
<th>Projected new jobs requiring postsecondary education and training</th>
<th>Additional credential completions by adults above current rate needed to meet workforce demand</th>
<th>Current degree &amp; career certificate completions for adult Oregonians age 25+</th>
<th>Total completions by adults (projected + new)</th>
</tr>
</thead>
<tbody>
<tr>
<td>122,500 from 2017-2027</td>
<td>12,000 per year or 120,000 over 10 years</td>
<td>Approximately 20,000 per year or 200,000 over 10 years</td>
<td>Approximately 320,000 over 10 years</td>
</tr>
</tbody>
</table>

Chart 2: Gaps in Oregon educational attainment by race/ethnicity, age 25 and older

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2 Source: HECC analysis of student records. Includes an estimate for twelve private institutions that are exempt from state oversight.

3 Source: American Community Survey data, 5-year and 1-year estimates.
**Chart 3: Credential Production and Workforce Demand**

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**Final Goal**

The final proposed goal, developed by the Adult Attainment Workgroup and refined by the HECC is below:

Oregon anticipates more than 120,000 additional jobs requiring post-secondary training or education between now and 2030. In order to meet this need, 300,000 additional adult Oregonians should earn a new degree, certificate or credential valued in the workforce during that time. Because Oregon has substantial attainment gaps among minority, low income and rural Oregonians, the state will also commit to reducing those attainment gaps by half during the decade.

While this goal is based on workforce projections developed by the Oregon Employment Department, we recognize that the broader purpose of this goal is to drive improvements in our educational and workforce systems. In order to improve the state and the lives of the people here, we need strategies that help adult Oregonians increase their skills, especially those who have been on the sidelines of the economic recovery. We also recognize that we need a broad and inclusive approach to both how people gain skills, in addition to who gains skills. The future prosperity of Oregon depends on innovative and inclusive approaches to skill and talent development for adults from all backgrounds, skill levels, and regions of the state.

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4 Source: American Community Survey data, 5-year and 1-year estimates.
Docket Item: 4.9 Oregon 2020-2023 WIOA Combined State Plan

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:

- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

Imperatives:

1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy

Summary:
Under the Workforce Innovation and Opportunity Act (WIOA), the Governor of each State must submit a Unified or Combined State Plan to the Secretary of the U.S. Department of Labor that outlines a four-year strategy for the State’s workforce development system. The publicly-funded workforce development system is a national network of Federal, State, regional, and local agencies and organizations that provide a range of employment, education, training, and related services and supports to help all job-seekers secure good jobs while providing businesses with the skilled workers they need to compete in the global economy. States must have approved Unified or Combined State Plans in place to receive funding for core programs. One of WIOA’s principal areas of reform is to require States to plan across core programs and include this planning process in the Unified or Combined State Plans. This reform promotes a shared understanding of the workforce needs within each State and fosters development of more comprehensive and
integrated approaches, such as career pathways and sector strategies, for addressing the needs of businesses and workers.

Oregon is submitting a Combined Plan for the first time. A Unified Plan includes only the six core programs. A Combined Plan include additional partners beyond the six core programs. The following programs are included in Oregon’s Combined Plan:

**Core Programs**
- Adult program (Title I of WIOA)\(^1\),
- Dislocated Worker program (Title I)\(^2\),
- Youth program (Title I)\(^3\),
- Adult Education and Family Literacy Act program (Title II)\(^4\),
- Wagner-Peyser Act Employment Service program (authorized under the Wagner-Peyser Act, as amended by title III)\(^5\), and
- Vocational Rehabilitation program (authorized under Title I of the Rehabilitation Act of 1973, as amended by Title IV)\(^6\).

**Additional Combined Plan Partner Programs**
- Temporary Assistance for Needy Families program (42 U.S.C. 601 et seq.)\(^7\),
- Employment and Training programs under the Supplemental Nutrition Assistance Program (programs authorized under section 6(d)(4) of the Food and Nutrition Act of 2008 (7 U.S.C. 2015(d)(4)))\(^8\),
- Work programs authorized under section 6(o) of the Food and Nutrition Act of 2008 (7 U.S.C. 2015(o))\(^9\),
- Trade Adjustment Assistance for Workers programs (activities authorized under chapter 2 of title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.))\(^10\),
- Senior Community Service Employment program (programs authorized under title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.))\(^11\), and
- Employment and training activities carried out by the U.S. Department of Housing and Urban Development\(^12\).

Each of these entities have their own missions, visions, and values and this Plan weaves these together on behalf of the broader workforce development system to realize equitable prosperity for all Oregonians. Delivering on this requires keen attention to the employment and skill needs...

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\(^1\) Higher Education Coordinating Commission Office of Workforce Investments  
\(^2\) Higher Education Coordinating Commission Office of Workforce Investments  
\(^3\) Higher Education Coordinating Commission Office of Workforce Investments  
\(^4\) Higher Education Coordinating Commission Office of Community Colleges and Workforce Development  
\(^5\) Oregon Employment Department Workforce Operations Division  
\(^6\) Oregon Department of Human Services Vocational Rehabilitation AND Oregon Commission for the Blind  
\(^7\) Oregon Department of Human Services Self-Sufficiency Programs  
\(^8\) Oregon Department of Human Services Self-Sufficiency Programs  
\(^9\) Oregon Department of Human Services Self-Sufficiency Programs  
\(^10\) Oregon Employment Department Workforce Operations Division  
\(^11\) Oregon Department of Human Services Seniors & People with Disabilities Programs  
\(^12\) U.S. Department of Housing and Urban Development
of business and industry both now and into the future and requires access to timely education and training for all individuals that is both valued in the marketplace and also results in or creates a pathway to self-sufficiency. This Plan demonstrates Oregon’s commitment to continuous improvement in the workforce development system to ensure increasing alignment of priorities and strategies to maximize resources currently within the workforce development system and to leverage additional resources not yet a part of the system.

**Important Changes and Improvements from the 2016-2019 Unified State Plan:**

**Combined vs. Unified Plan**
Expanding and strengthening partnerships has been a priority within Oregon’s workforce system for many years. More formally including state agency partners in the Oregon 2020-2023 WIOA Combined State Plan for the first time is further evidence of that priority. This will continue to allow greater alignment and leveraging of programs and resources.

**WTDB Strategic Plan**
The WTDB’s new 2020-2021 Strategic Plan is included as the focal point or “north star” of the Oregon 2020-2023 WIOA Combined State Plan. The WTDB Strategic Plan was discussed among agency partners and workforce system stakeholders at an October 3, 2019 meeting to, in part, help shape the Combined Plan. Aspects of the WTDB Strategic Plan are reflected throughout the Combined Plan.

**Economic and Workforce Analysis**
The Economic and workforce analysis is expanded in the Oregon 2020-2023 WIOA Combined State Plan. The Oregon Employment Departments Research Division provided additional data and analysis including new information on automated/autonomous vehicles, the forest products sector, the maritime sector, and defining true wage among others. The key findings from the 2018 Oregon Talent Assessment are also included.

**Priority State Strategies**
The Oregon 2020-2023 WIOA Combined State Plan describes the following priority state strategies among workforce system partners to deliver on the Imperatives in the WTDB 2020-2021 Strategic Plan and the performance measures required under WIOA:

- Industry Sector Strategies, particularly Next Generation Sector Partnerships
- Work-Based Learning which is also a priority strategy in Oregon’s new Career Technical Education (CTE) State Plan
- Career Pathways broadly defined and providing sequences of high-quality education, training, and services connected to industry skill needs
- Adult Attainment strategies that develop and provide a broad and inclusive approach to both how people gain skills and who gains skills
- WorkSource Oregon Centers that continue to provide the backbone of service delivery to businesses and job seekers
HIGHER EDUCATION COORDINATING COMMISSION
WORKFORCE AND TALENT DEVELOPMENT BOARD
December 6, 2019
Docket Item 4.5

Docket Material:

Draft Oregon 2020-2023 WIOA Combined State Plan,
Summary of Public Comment and Staff Response.

Staff Recommendation:

Approve Oregon 2020-2023 WIOA Combined State Plan and recommended revisions for submission to the U.S. Department of Labor.
Docket Item: 5.1 Local Planning – Oregon Workforce Partnership

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:

- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

 Strategic Plan Imperatives:

1. **Create a Culture of Equitable Prosperity**
2. **Increase Understanding and Utilization of the System**
3. **Position Oregon as a National Leader**
4. **Identify and Align Strategic Investments**
5. **Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy**

Summary:

Under the Workforce Innovation and Opportunity Act (WIOA), the Governor of each State must submit a Unified or Combined State Plan to the Secretary of the U.S. Department of Labor that outlines a four-year strategy for the State’s workforce development system. In a similar fashion, local workforce development boards (LWDBs) must submit a four-year plan to their respective state boards.

In Oregon, the nine LWDBs are currently developing their local plans according to the guidelines and template provided by the Higher Education Coordinating Commission Office of Workforce Investments on November 19, 2020. Most LWDBs were working on their local plan before the guidelines and template were finalized and are now in final stages of preparation including public comment and LWDB approval. LWDB plans are due to the WTDB for review by April 30, 2020.
LWDB plans will be evaluated\(^1\) during May and presented to the WTDB with recommendations from the evaluation team at the June 12, 2020 WTDB meeting.

**Docket Material:**

Workforce Innovation and Opportunity Act Local Plan Template.

**Staff Recommendation:**

This is an information item only.

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\(^1\) The evaluation process is currently under development and will be completed and communicated soon. Through U.S. Department of Labor grant funds, the consultants with the firm of Maher & Maher are assisting in the development of the evaluation process, communication, and training related to the process.
Workforce Innovation and Opportunity Act
Local Plan
[INSERT LOCAL AREA NAME]

Submitted by
[INSERT LOCAL BOARD NAME]

July 1, 2020 – June 30, 2024
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Section 5: Compliance .................................................................................................. 12
Section 1: Workforce and Economic Analysis

Please answer the questions in Section 1 in eight (8) 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.

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 twelve (12) pages or less. Section 2 responses should be greatly influenced by the members of the local workforce development board and other community stakeholders.

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
  o The Board is positioned as the “go to” source for labor market information among community partners.
  o The Board utilizes the labor market intelligence provided by regional economists for decision making.

• Strategy
  o The Board monitors and updates a strategic plan.
  o The Board frames board meetings around strategic initiatives and utilizes a consent agenda.

• Partnerships and Investments
  o The Board collaborates regularly with core partners and organizations beyond the core partners.
  o The Board is business-driven and uses a sector-based approach to engaging local employers.

• Programs
  o The Board promotes efforts to enhance provision of services to individuals with barriers to employment.
  o The Board has established policies, processes, criteria for issuing individual training accounts that aligns with its identified goals, strategies, and targeted industries.

2.5 Describe how the board’s goals relate to the achievement of federal performance accountability measures. [WIOA Sec. 108(b)(1)(E)]
Section 3: Local Area Partnerships and Investment Strategies

Please answer the questions in Section 3 in eight (8) 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.

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)]

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)]

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)]

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)]

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)]

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)]
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?
### Section 4: Program Design and Evaluation

Please answer the following questions in Section 4 in **ten (10) 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.

#### 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)]

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)]

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.

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)]

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)]

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)]
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)]

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.
## Section 5: Compliance

Please answer the questions in Section 5 in **eight [8] 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)] |
| 5.2 | Identify the One-Stop Operator and describe the established procedures for ongoing certification of one-stop centers. |
| 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. |
| 5.8 | Identify the entity responsible for the disbursal of grant funds. See Local Plan References and Resources. [WIOA Sec. 108(b)(15)] |
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

### 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 will be posted in the near future.
Docket Item: 6.1 Local Board Designations

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:

• Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
• Advising the Governor and the legislature on workforce policy and plans;
• Aligning public workforce policy, resources, and services with employers, education, training and economic development;
• Identifying barriers, providing solutions, and avoiding duplication of services;
• Promoting accountability among public workforce partners; and
• Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

Strategic Plan Imperatives:

1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy

Summary:

On October 22, 2014, the Governor, upon recommendation of the Oregon Workforce Investment Board (now WTDB), designated five new local workforce areas. The process conformed to Section 116 of the Workforce Investment Act (WIA) and aligned with Section 106(b)(4) of the Workforce Innovation and Opportunity Act (WIOA).

On September 13, 2019, WTDB Docket Item 6.2 included information that some county commissioners across the State were discussing the option to (re)designate local workforce development areas.

To date, three counties in Oregon – Morrow, Umatilla, and Benton – have requested to leave their current local workforce development areas. Copies of the requests are included. Now that some counties have made that request, the next step will be for any newly proposed local workforce areas to submit a request for designation. These requests must include specific
analysis and other (economic, demographic, etc.) information pertaining to the proposed new areas. Representatives from the WTDB, HECC/OWI, and the Governor’s office will review these responses and determine next steps.

Designating new local workforce development areas occurs when the Governor, after receiving recommendation(s) from the WTDB, submits the proposed boundaries to the US Department of Labor for federal approval. New local workforce development areas will potentially result in the realignment of some county-by-county economic initiatives. Changes to local area boundaries will result in changes to the federal funding received by each local area affected. If no unexpected delays occur, any new local workforce development areas approved by the Governor would become effective on **July 1, 2021.**

Below is a high level, outline of the process, once the designation request process has started:

The process for designation must include the following:

1. Consultation with the state board;
2. Consultation with chief elected officials;
3. Consideration of comments received through the public comment process, which includes an opportunity for public comment and comment by businesses and representatives of labor organizations;
4. Consideration by the governor of geographic areas served by local education agencies, intermediate education agencies, postsecondary and vocational institutions or schools, and alignment with labor market areas (which could be defined as regional economies); and
5. Consideration by the governor of the distance that individuals must travel to receive services in such local areas and the resources available to effectively administer the activities carried out under WIOA title I.

The role of the WTDB in this process includes:

- Reviewing forwarded designation requests from the Governor
- Determining/evaluating whether there was compelling evidence that a designation would improve a variety of factors
- Providing opportunities for public comment throughout the process
- Make final recommendations to the Governor

**Docket Material:**

- Designation Requests and Map

**Staff Recommendation:**

This is an information item. No action required.
Local Workforce Development Area Designation Request Form

Use this form to request any changes to the current Local Workforce Development Areas (local areas) in Oregon.

A completed physical copy, or a scanned copy that includes the requestor's signature, must be submitted to:

Workforce and Labor Policy
c/o GOVERNOR'S OFFICE
900 Court Street NE, Suite 160
Salem, OR 97301
Attn: Policy Advisor

Initiator/Requestor:
☑ Chief Elected Official(s) Click here to enter text.
☐ Oregon Workforce Investment Board (OWIB) Click here to enter text.

Requested change (please include proposed new boundaries/areas):
Click here to enter text.

Reason/justification for requested change(s):
Click here to enter text.

Signature of requestor(s):
George Mundock

Title:
Board Chair

Date:
June 18, 2019
Umatilla County
Board of County Commissioners

George L. Murdock 541-278-6202  William J. Elfering 541-278-6201  John M. Shafer 541-278-6203

June 25, 2019

Requested Change

Umatilla County wishes to be transferred to a new workforce investment board region composed of Umatilla and Morrow Counties. Our new regional office would be housed at the Port of Morrow in Boardman. We are aware that local workforce regions are established to reflect the unique characteristics of the area they serve. We do not believe our region was established using that criteria but rather as a matter of convenience and scale.

Reason/Justification for Requested Change

The current configuration is unwieldy covering more than a third of the entire State of Oregon. A map of the state quickly reflects the fact that most local boards are comprised of a single county or in some cases perhaps two or three counties.

Seeking to have a local board that stretches from the Washington border, along the Idaho border, to the Nevada border overlooks the fundamental purpose of local boards that is to reflect the citizenry and the economy of the area they serve. There are virtually no economic or even social ties between the northern end of the EOWB region and the southern end. Much of the lower half of the region has more ties to Idaho and Nevada. It is almost 400 miles from one end of the EOWB to the other.

We’ve tried to imagine the response if an attempt were made to put all of the counties between the Columbia River and the California border in a single region which, in the end, would be a smaller area than the current Eastern Oregon Region. Instead, that area includes seven separate regions.

When the region was first formed, Umatilla County sought to be placed in a regional that more accurately reflected the economic character of the county. Instead, in order to create a population base sufficient to support a certain region, Umatilla was arbitrarily placed in the EOWB. There is a clear record of the fact Umatilla County did not wish to be in the EOWB and the EOWB clearly did not want Umatilla County included. This has been documented and the director of the EOWB has a record.

In good faith, Umatilla County sought to provide quality board members to the EOWB. All of our appointed members have resigned citing concerns the EOWB lacks a desire for oversight and is neither transparent nor accountable but simply wants a board that will rubber stamp decisions. These were both major business leaders who have made it clear they would be happy to serve in a new configuration.

In addition, we are deeply concerned about the proportion of the EOWB budget devoted to staff and overhead. It appears the 2019-2020 budget includes yet another new staff position. We believe the resources of a workforce region should be focused on programs, not exorbitant salaries and staffing levels and that our new region could demonstrate that philosophy.

More recently, the contract which was being used to serve Umatilla and Morrow Counties has been transferred to an organization housed with EOWB despite the protests of Umatilla County and the fact there had been no service complaints. In addition, when a recent call for proposals was sent out, the Umatilla County proposal was not funded. Sadly, the criteria for awarding the grants was established after they were received.
While we do not believe we could be successful in attracting major business leaders to EOWB, we are confident we could immediately enlist a large group of business leaders for a region of our own where they would be involved in meaningful participation. At the moment, it appears that participation from major business leaders is dwindling within EOWB.

Umatilla County, like Morrow County, is experiencing rapid economic growth fueled by Amazon and other major enterprises. In addition, while there remains a great deal of wheat production and cattle ranching in the area, precision agriculture has expanded dramatically.

We believe both Umatilla and Morrow Counties have established impressive workforce activities on their own since there has been minimal support from EOWB. Most recently, a two-day workforce summit was held in Pendleton that served 900 participants. The budget for that event was over $20,000. A grant of $500 was received from EOWB, but the remaining funds came from local sponsors. The production of the event was entirely done by individuals from Umatilla County.

Moreover, this is only the tip of the iceberg in terms of the workforce efforts being done at the current time by Umatilla and Morrow Counties. Unfortunately, the work is not being done in concert with the Eastern Oregon Workforce Board but rather independently by the two counties due to an almost virtual estrangement from the EOWB. Imagine the possibilities if the proposed new region could become a full partner with the OWIB.

Respectfully submitted,

George Murdock,
Chair
Umatilla County Board of Commissioners

GM/ms
WHEREAS the Workforce Innovation and Opportunity Act (WIOA) includes the requirement that the Governor designate local workforce development areas to enable receipt of funding under Title I of the WIOA;

WHEREAS WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy;

WHEREAS in 2015, Local Workforce Boards were re-chartered to align federal and state program areas that would better serve Oregon's residents and businesses, and Umatilla County was placed in a Local Workforce Investment Board with Baker, Grant, Harney, Malheur, Morrow, Union and Wallowa Counties, designated Eastern Oregon Workforce Board (“EOWB”);

WHEREAS the purpose of a local area is to serve as a jurisdiction for the administration of workforce development activities using Adult, Dislocated Worker, and Youth funds allocated by the State and to coordinate efforts related to the other core programs at a local community level;

WHEREAS the current configuration is unwieldy covering more than a third of the entire State of Oregon and a map of the state quickly reflects the fact that most local boards are comprised of two or three counties and with much smaller land areas;

WHEREAS seeking to have a local board that stretches from the Washington border, along the Idaho border, to the Nevada border overlooks the fundamental purpose of local boards which is to reflect the citizenry and the economy of the area they serve and the fact that there are virtually no economic or even social ties between the northern end of the EOWB region and the southern end;

WHEREAS despite active participation in the EOWB, administration and funding has largely ignored the northeast area of the area and instead focused on issues and situations common to the remainder of the area but not present or applicable to Umatilla or Morrow Counties;

WHEREAS Umatilla County, like Morrow County, is experiencing rapid economic growth fueled by data centers and other major enterprises, and although a great deal of wheat production and cattle ranching remain the area, precision agriculture has expanded dramatically, creating the need for specific workforces in the two county region;
WHEREAS the workforce needs of the region have resulted in the two counties utilizing their own limited funding to address specialized workforce needs and issues, without the assistance of or funding from the EOWB;

WHEREAS the similar workforce needs of Morrow and Umatilla County have resulted in a regional labor market area with citizens working in one county and living in the other county;

WHEREAS a concerted and joint effort of the two counties in one Local Workforce Development Area, would better serve the workforce needs of the area and direct needed resources in a more effective and efficient method to assist job seekers and meet the skilled workforce required of this region.

NOW THEREFORE, THE UMATILLA COUNTY BOARD OF COMMISSIONERS ORDERS THAT:

1. Umatilla County will support and participate in a new Local Workforce Development Board that will cover the areas of Morrow and Umatilla Counties.

2. Umatilla County will file a Workforce Development Area designation request form with the Governor's Office for a Morrow-Umatilla Workforce Development Board.

DATED this 19th day of June, 2019.

UMATILLA COUNTY BOARD OF COMMISSIONERS

George L. Murdock, Chair

John M. Shafer, Commissioner

William J. Ellering, Commissioner

ATTEST:

OFFICE OF COUNTY RECORDS

Records Officer

Order No. BCC2019-053 - Page 2 of 2
WHEREAS the Workforce Innovation and Opportunity Act (WIOA) includes the requirement that the Governor designate local workforce development areas to enable receipt of funding under Title I of the WIOA;

WHEREAS WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy;

WHEREAS in 2015, Local Workforce Boards were re-chartered to align federal and state program areas that would better serve Oregon's residents and businesses, and Morrow County was placed in a Local Workforce Investment Board with Baker, Grant, Harney, Malheur, Umatilla, Union and Wallowa Counties, designated Eastern Oregon Workforce Board ("EOWB");

WHEREAS the purpose of a local area is to serve as a jurisdiction for the administration of workforce development activities using Adult, Dislocated Worker, and Youth funds allocated by the State and to coordinate efforts related to the other core programs at a local community level;

WHEREAS the current configuration is covering more than a third of the entire State of Oregon and a map of the state quickly reflects the fact that most local boards are comprised of two or three counties and with much smaller land areas;

WHEREAS seeking to have a local board that stretches from the Washington border, along the Idaho border, to the Nevada border overlooks the fundamental purpose of local boards which is to reflect the citizenry and the economy of the area they serve and the fact that there are virtually no economic or even social ties between the northern end of the EOWB region and the southern end;
WHEREAS despite active participation in the EOWB, administration and funding has largely ignored the northeast area of the area and instead focused on issues and situations common to the remainder of the area but not present or applicable to Umatilla or Morrow Counties;

WHEREAS Morrow County, like Umatilla County, is experiencing rapid economic growth fueled by data centers and other major enterprises, and although a great deal of wheat production and cattle ranching remain in the area, precision agriculture has expanded dramatically, creating the need for specific workforces in the two county region;

WHEREAS the workforce needs of the region have resulted in the two counties utilizing their own limited funding to address specialized workforce needs and issues, without the assistance of, or funding from the EOWB;

WHEREAS the similar workforce needs of Morrow and Umatilla County have resulted in a regional labor market area with citizens working in one county and living in the other county;

WHEREAS a concerted and joint effort of the two counties in one Local Workforce Development Area, would better serve the workforce needs of the area and direct needed resources in a more effective and efficient method to assist job seekers and meet the skilled workforce required of this region.
NOW THEREFORE, THE MORROW COUNTY BOARD OF COMMISSIONERS RESOLVES THAT:

1. Morrow County will support and participate in a new Local Workforce Development Board that will cover the areas of Morrow and Umatilla Counties.

2. Morrow County will work in collaboration with Umatilla County to accomplish the new Local Workforce Development Board.

3. Morrow County will file a Workforce Development Area designation request form with the Governor’s Office for a Morrow-Umatilla Workforce Development Board.

Dated this 26th day of June 2019.

MORROW COUNTY BOARD OF COMMISSIONERS
MORROW COUNTY, OREGON

Jim Doherty, Chair
Melissa Lindsay, Commissioner
Don Russell, Commissioner

Approved as to Form:

Morrow County Counsel
November 5, 2019

Workforce and Labor Policy
c/o Governor’s Office
900 Court Street NE, Suite 160
Salem, OR 97301
Attn: Policy Advisory

Dear WorkSource Oregon,

The Commissioners of Benton County formally request WorkSource Oregon consider the attached Local Workforce Development Area Designation Request for transfer of Benton County from Northwest Oregon Works (NOW) to Willamette Workforce Partnership (WWP). We believe Benton County’s workforce development will best be served by aligning with WWP for its alignment around business sector strategies and geographic continuity. Additionally, we offer the following for your consideration:

- Linn-Benton Community College (LBCC), a cornerstone of workforce development education, training, and programs, lies within WWP. Historically, LBCC and NOW have struggled to find ways to work together. Ideas and conversation regarding healthcare partnerships have languished.
- Benton County businesses have close alignment with the sector strategies of WWP, including transportation, warehousing and distribution, manufacturing and health care. Conversely, NOW’s maritime and advanced textiles sectors poorly align with Benton County.
- Benton County’s Community Services Consortium, its community action agency, contracts for services to WWP for Linn County today; synergies between the County’s poverty alleviation programs and workforce training are better optimized through WWP.
- Benton County’s annual average wage more closely aligns with WWP than NOW, another reflection of its sector alignment.
- Benton County’s population and community needs differ dramatically from those of coastal communities.

We believe WWP would welcome our participation and represents the best alignment to achieve Benton County and WorkSource Oregon’s goals and objectives.

Respectfully,

Annabelle Jaramillo, Chair
Pat Malone, Commissioner
Xanthippe Aingerot, Commissioner
Local Workforce Development Area Designation Request Form

Use this form to request any changes to the current Local Workforce Development Areas (local areas) in Oregon.

A completed physical copy, or a scanned copy that includes the requestor's signature, must be submitted to:

Workforce and Labor Policy
c/o GOVERNOR'S OFFICE
900 Court Street NE, Suite 160
Salem, OR 97301
Attn: Policy Advisor

Initiator/Requestor:
☒ Commissioners: Annabelle Jaramillo, Pat Malone and Xanthippe Augerot
☐ Oregon Workforce Investment Board (OWIB) Click here to enter text.

Requested change (please include proposed new boundaries/areas):
Change from Northwest Oregon Works to Willamette Workforce Partnership

Reason/justification for requested change(s):
Better alignment to achieve Benton County's and WorkSource Oregon's goals and objectives. Please see attached letter for further supporting information.

Signature of requestor(s):

Annabelle Jaramillo
Pat Malone
Xanthippe Augerot

Title:
Chair
Commissioner
Commissioner

Date:
11/5/2019
11/5/19
11/6/19
Docket Item:  6.2 DOL Funding Allocations

Our Position is that the Oregon Workforce and Talent Development Board (WTDB) enables meaningful work for all Oregonians by:
- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions.

Strategic Plan Goals:

1. Create a Culture of Equitable Prosperity
2. Increase Understanding and Utilization of the System
3. Position Oregon as a National Leader
4. Identify and Align Strategic Investments
5. Create a Board Culture that is Resilient and Adaptable and Flexible to a Changing Economy

Summary:

WIOA HAS FOUR MAIN TITLES:

- Title I- State and Local Boards; Adult, Dislocated Worker, Youth (Higher Education Coordinating Commission- HECC)
- Title II- Adult and Family Literacy (HECC)
- Title III- Wagner-Peyser (Labor Exchange- Oregon Employment Department)
- Title IV- Vocational Rehabilitation (Department of Human Services- Commission for the Blind)

As part of its responsibilities, the Oregon Workforce Talent and Development Board (WTDB) reviews the annual Title I budget that the HECC prepares in consultation with the Governor’s Office. The Grant Year for Federal WIOA Funds is July 1 through June 30 of each year.
In Oregon, the HECC Office of Workforce Investments receives an annual allotment from the US Department of Labor (DOL) via three funding streams: Adult, Dislocated Worker and Youth. These funds are used for Employment and Training Activities including board support.

A majority of the funding is required to go to Local Workforce Development Boards (LWDBs) via prescribed formula. The formula is based on employment and economic data at the board level.

Prior to the formula being applied the state (HECC) is allowed to reserve up to:

- 5% of each of the funding streams for Administration
- 10% of each of the funding streams for Statewide Activities
- 25% of the Dislocated Worker funding for Rapid Response/Pre-Layoff Services

After reserving funds, the remaining funds go directly to the LWDBs. Due to dramatic cuts in local allocations, the state has been reserving less than its allowable amounts in previous years.

That US Department of Labor has not yet issued the Training and Employment Guidance Letter (TEGL) that announces the annual allotment for 2020 so this is for informational purposes only.

**Docket Material:**

[Allocation Flow Charts](#)

**Staff Recommendation:**

This is an information item. No action required.
WIOA Title I Formula Allocation Process for Youth/Adult Funds (with no Areas of Substantial Unemployment - ASUs)

Allocation Training Employment Guidance Letter (TEGL) is received for Youth/Adult/DW

State reserves are set aside—remaining $'s go to the LWDB's based on a formula

Allocation is calculated:
- 33.3% Areas of Substantial Unemployment (ASU) (6.5% or higher)—No ASUs (this is left as 33.3% in a holding pot)
- 33.3% Excess Unemployment
- 33.3% Disadvantaged Youth/Adults

$ per LWDB and % of the total LWDBs

90% Hold Harmless is Calculated:
Calculated by taking the average percentage of the LWDB's portion of funds for the last two years and multiplying by 90%. (If a LWDB had 25% in Year 1 and then 30% of the total allocation in Year 2 = 27.5% x .90 = 24.75% - in this example the LWDB would be guaranteed 24.75% of the total allocation for the current year.

If any LWDBs need to have their initial allocation increased in order to meet the Hold Harmless, those funds shall be obtained by ratably reducing the allocations to be made to other LWDBs that are above the Hold Harmless calculation. Not used until all of the holdback is used

Only 66.66% allocated at this point

All the LWDBs are now brought up to the Hold Harmless calculation using the remaining 33.33% of the allocation left (holding pot)

After everyone is brought up to at least the Hold Harmless--this still leaves a balance in the holding pot - This remaining balance is now allocated out.

This allocation is calculated by taking each LWDB’s percentage of the first round of allocation in comparison to the overall allocation to the LWDBs. (if a LWDB had 5% of the first round allocation--they would receive 5% of the remaining balance in the holding pot)

Final Allocation for the Grant Year broken into PYxx and FYxx for all the LWDBs (All PY for Youth--PY/FY for Adult)
WIOA Title I Formula Allocation Process for Dislocated Worker Funds

1. Training & Employment Guidance Letter (TEGL) is received for Youth/Adult/DW
2. HECC may withhold up to 15% for Statewide Activities (includes 5%)
3. HECC may withhold up to 25% for Rapid Response Activities
4. State reserves are set aside-remaining $'s go to the LWDBs based on a formula

State Allocation Formula:
- 20% Total Unemployed
- 20% Excess Unemployed
- 20% Exhaustees
- 20% Total UI Claimants
- 20% Declining Industries

90% Hold Harmless is Calculated:
Calculated by taking the average percentage of the LWDB's portion of funds for the last two years and multiplying by 90%.
(If a LWDB had 25% in Year 1 and then 30% of the total allocation in Year 2 = 27.5% x .90 = 24.75% - in this example the LWDB would be guaranteed 24.75% of the total allocation for the current year.)

If any LWDBs need to have their initial allocation increased in order to meet the Hold Harmless, those funds shall be obtained by ratably reducing the allocations to be made to other LWDBs that are above the Hold Harmless calculation.

Final Allocation for the Grant Year broken into PYxx and FYxx for all the LWDBs
WIOA Title I Formula Allocation Process for Youth/Adult Funds

Allocation Training Employment Guidance Letter (TEGL) is received for Youth/Adult/DW

State reserves are set aside—remaining $’s go to the LWDBs based on a formula

Allocation is calculated:
- 33.3% Areas of Substantial Unemployment (6.5% or higher)
- 33.3% Excess Unemployment
- 33.3% Disadvantaged Youth/Adults

$ per LWDB and % of the total LWDBs

90% Hold Harmless is Calculated:
Calculated by taking the average percentage of the LWDB’s portion of funds for the last two years and multiplying by 90%. (If a LWDB had 25% in Year 1 and then 30% of the total allocation in Year 2 = 27.5% x .90 = 24.75% - in this example the LWDB would be guaranteed 24.75% of the total allocation for the current year.)

If any LWDBs need to have their initial allocation increased in order to meet the Hold Harmless, those funds shall be obtained by ratably reducing the allocations to be made to other LWDBs that are above the Hold Harmless calculation.

Final Allocation for the Grant Year broken into PYxx and FYxx for all the LWDBs (All PY for Youth—PY/FY for Adult)