

PacMtn Workforce Development Council
Executive Finance Committee Agenda
Friday March 8, 2019 ▪ 11:00 am – 12:30 pm
PacMtn Offices ▪ John Loyle Conference Room
1570 Irving St. ▪ Tumwater, WA 98512
Zoom Meeting: <https://zoom.us/j/962718747>
1-669-900-6833



I. Welcome & Check-In Items

- A. Introductions & Establish Quorum
- B. Review of EFC Committee Agenda
- C. Action Item: Motion to Approve November 2018 EFC Minutes (Attachment 1)
- D. Board Chair Comments
- E. Review of Upcoming Board Meeting Agenda
- F. CEO Report

II. Committee & Task Force Updates

- A. One Stop Committee
- B. Targeted Populations Committee
- C. Adult Basic Education & Literacy (ABEL)
- D. Business and Sector Engagement (BaSE)

III. Fiscal Items (Bridget Lockling)

- A. Action Item: Motion to Approve Quarterly Financials (Attachment 2)
- B. Action Item: Motion to Approve PY17 990 Tax Statement
- C. Action Item: Motion to Approve Policies
 - Opioid Use Reduction and Recovery (OURR) Eligibility Policy (Handout)
 - On-Site Representation and Customer Referral Policy (Handout)
- D. Action Item: Motion to Approve Community Outreach Grant – Olympic College Youth Camp

IV. Executive & Administrative Items

- A. WorkSource Collaborative Report (Handout)
- B. Discussion: WorkSource Certification Process (Attachment 3)
- C. Discussion: Review of Retreat Comments and Next Steps (Handout)

V. Possible Executive Session to Discuss CEO Performance

VI. Good of the Order & Announcements

Proposed 2019 Board Meeting Schedule

Date	Location
March 28	TBD
April/May Budget Workshop (date TBD)	TBD
June 27	TBD
September 26	TBD
November 18	TBD
December 13	TBD

Executive Finance Committee

Date	Location
March 8	PacMtn Offices
April 12	PacMtn Offices
May 10	PacMtn Offices
June 14	PacMtn Offices
September 13	PacMtn Offices
October 11	PacMtn Offices
November 8	PacMtn Offices
December 13	PacMtn Offices

Executive Finance Committee Members

Name	Business	County	Position
1. Duane Evans	Port Blakely US Forestry	Lewis	Chair
2. Jacquelin Earley	Sierra Pacific Industries	Mason	Chair-Elect
3. Dr. Jim Minkler	Grays Harbor College	Grays Harbor	Vice-Chair
4. Steve Rogers	Pacific County Historical Society & Museum	Pacific	Treasurer
5. Cheryl Heywood	Timberland Regional Library	Regional	One Stop Committee Lead
6. David Schaffert	Thurston County Chamber	Thurston	Targeted Populations Committee Lead
7. Kairie Pierce	WA State Labor Council	Regional	Target Populations Committee Co-Lead
8. Lisa Olson	Pacific County Commissioner	Pacific	Consortium Chair, Ex Officio
9. Derek Epps	Seattle Shellfish	Mason	Industry Representative
10. Vacant			ABEL Committee Lead

Workforce Development Speak (Commonly Used Acronyms)

ABE	Adult Basic Education	IFA	Infrastructure Funding Agreement
CBO	Community Based Organizations	ITA	Individual Training Account
CJ	Community Jobs	MOU	Memorandum of Understanding
CLEO	Chief Local Elected Official	MyJob	My Journey Out Beyond
CSO	Community Service Offices	OJT	On the Job Training
DOL	Department of Labor	OURR	Opioid Use Reduction & Recovery
DSHS	Department of Social of Health Services	TAA	The Trade Adjustment Assistance
DVR	Division of Vocational Rehabilitation	TANF	Temporary Assistance for Needy Families
ESD	Employment Security Department	WDA	Workforce Development Areas
DW	Dislocated Worker	WEX	Work Experience
ESD 113	Educational Service District – Capital Region	WIOA	Workforce Innovation & Opportunity Act
ETPL	Eligibility Training Provider List	WTECB	Workforce Training & Education Coordinating Board



Member List

<u>Name</u>	<u>Business</u>	<u>County</u>	<u>Position</u>
1. Duane Evans	Port Blakely US Forestry	Lewis	Chair
2. Jacquelin Earley	Sierra Pacific Industries	Mason	Chair Elect
3. Dr. Jim Minkler	Grays Harbor College	Grays Harbor	Vice Chair
4. Cheryl Heywood	Timberland Regional Library	Regional	One Stop Committee Lead
5. David Schaffert	Thurston County Chamber	Thurston	Targeted Populations Committee Co-Lead
6. Kairie Pierce	WA State Labor Council	Regional	Target Populations Committee Co-Lead
7. Terri Drexler	Mason County Commissioner	Mason	Consortium Chair, Ex-Officio
8. Derek Epps	Seattle Shellfish	Mason	Industry Representative
9. Steve Rogers	Pacific County Historical Society & Museum	Pacific	Treasurer

Attendees: Duane Evans, Jacquelin Earley, Steve Rogers, Cheryl Heywood, David Schaffert
Staff: Cheryl Fambles, Vanessa Wasman, Corinne Daffern, Bridget Lockling

Excused: Dr. Jim Minkler, Kairie Pierce, Derek Epps, Terri Drexler

I. Welcome & Check In

A. The meeting was called to order at 11:12 am and quorum was established at 11:30 pm. David Schaffert joined the meeting by phone and later arriving in person for the remainder of the meeting.

C. Duane gave his Board Chair Report mentioning the recent WWA conference and encouraged Board members to give a report out on their experiences at the conference. He also mentioned the January 2019 WDC retreat and Cheryl Fambles' Distinguished Leader Award. The November WDC Agenda was reviewed and no changes were made. Preparations were made for Employment Security Department Commissioner Suzi Levine joining that meeting. The Committee identified some of the questions to facilitate the discussion with her. Duane reminded the group about the upcoming Regional Expo December 6 at the Little Creek Casino.

D. Motion to Approve the September 2018 EFC minutes – *Steve Rogers motioned to approve the minutes, seconded by Cheryl Heywood. Motion carries.*

II. Task Force Updates

- A. One Stop Committee – Cheryl Heywood reported that the group met on October 4th and discussed brand standardization, current and future states of integrated service delivery, onsite policy recommendations as well as training and core competencies. She also mentioned the beginnings of a shared intranet site for all One Stop partners as well as a developing a dashboard that helps summarize and explain the activities of the committee.

Targeted Populations Committee – David Schaffert gave this report saying that the group met in early October with focused discussion on how does the Committee engage in the One Stop work and goals? How does the Committee leverage Career Connected Learning work for this population? He also said that Craig Clark, Senior Compliance Officer at PacMtn came to the last Targeted Populations meeting and spoke to the group regarding Equal Opportunity updates and information on behalf of the Barrier and Access Solutions Committee (BASC).

Adult Basic Education & Literacy (ABEL) – Corinne Daffern reported that the group hasn't met recently but was included in the last One Stop Committee meeting. Cheryl Heywood said that all Chrome Books within the TRL system are in circulation with patrons and there have been 11 graduates from the HS21 program. Cheryl Fambles mentioned that a representative from the ABEL committee will be named in the future and will sit on the Executive Finance Committee.

Business and Sector Engagement (BaSE) – Cheryl Fambles reported that this committee will be supporting the Regional Expo in December and will be launching an incumbent worker program that will focus on how to train up the existing workforce and also will be having specific discussions on the cluster update.

III. Fiscal Items

- A. Program Year July 1, 2017 – June 30, 2018 Quarterly Financial Statements – Bridget went over the statements reporting that overall organization expenses for the year are about 75% of budgeted. Program Services expenses came in at 71% of budget, contracts ending June 30th came in at target, while most contracts are continuing on into PY18. There are a few contracts that show over expenditures but those contracts have been modified since the last Budget so the new totals are not reflected in the statements. Administrative Services costs are 91% on budget and are on target in all budget areas. *Steve Rogers motioned to approve the quarterly financial statements, seconded by Cheryl Heywood. Motion carries.*

- B. Recommendation to Adopt the PY18 Final Budget – Bridget pointed out the \$3M increase due to the Opioid Reduction and Recovery grant funding and additional incoming funds from the State's Rapid Response Mitigation fund. Administrative budget shows minor changes in salaries and benefits and including increase in the cost of IT equipment and financial software. *Steve Rogers motioned to recommend approval of*

the PY18 Final Budget, seconded by Cheryl Heywood. Motion carries.

C. Change in Camo2Commerce Columbia Bank Signature Card –The change is occurring due to the close out of the Camo2Commerce funds and change in staffing for that program. *Steve Rogers motioned to approve the change in the C2C Columbia Bank Signature Card, seconded by Cheryl Heywood. Motion carries.*

D. Community Outreach Funding Proposals

- Thurston County Chamber Boss of the Year Recognition Event
- Pacific Northwest Apprenticeship Conference

The materials were reviewed. *Steve Rogers motioned to approve both of the Community Outreach Funding Proposals, seconded by Cheryl Heywood. Motion carries.*

IV. Executive & Administrative Items

A. Extension of the Title I Service Provider Request for Proposal (RFP) – Cheryl Fambles and Corinne Daffern reported on this topic recommending delay of the release for RFPs for Title I Service Providers for one year due to the large number of other PacMtn initiatives involving those same providers. There is great momentum in the partners working well together and another year would allow movement forward on some important activities. This additional time also allows greater understanding about what we might need to build into the next RFP. The proposal is that procurement planning would begin in the fall of 2019 with release of the RFP in January 2020. *Steve Rogers motioned to authorize the CEO to execute plans as outlined for extension of the current WIOA Service Providers through June 30, 2020, seconded by Cheryl Heywood. Motion carries.*

V. Good of the Order Items & Announcements –

Cheryl Heywood mentioned Timberland Regional Library’s Veteran’s History Project and the opportunity for patrons to reserve light boxes to help combat Season Effective Disorder in some of the libraries.

David Schaffert reminded the group that Governor Inslee will be the keynote speaker at the next Chamber Forum and congratulated Cheryl on her Distinguished Leader award.

Steve Rogers said that he is a new member of the Pacific County Economic Development Council and that South Bend School Board won 2018 Small School Board of the Year award.

Meeting adjourned at 12:44 pm. Submitted by: Vanessa Wasman, Program Assistant

PacMtn Workforce Development Council

Board Meeting Agenda

Thursday, March 28, 2019 ▪ 1:30 - 4:00 pm

Location ▪ To Be Announced



I. Welcome & Leadership Reports (Duane Evans)

- A.** Welcome, Establish Quorum & Review Today's Agenda
- B.** Board Chair Report
- C.** CEO Report (Cheryl Fambles)

II. Action: Consent Agenda

The Consent Agenda is a SINGLE item for Board consideration that encompasses items the Board would typically approve with little comment. Procedural items such as approval of Minutes, or other legal or housekeeping items are appropriate for a Consent Agenda. There can be explanation of items, but there is no discussion of the Consent Agenda. If discussion is warranted or requested ANY item can be immediately removed and placed on the regular Agenda for full board discussion.

A. Action Item: Motion to Approve

- Minutes from December 2018 Meeting and Retreat
- Quarterly Financials
- PY17 990 Tax Statement
- Opioid Use Reduction and Recovery (OURR) Eligibility Policy
- On-Site Representation and Customer Referral Policy

I. Strategic Discussions

- A.** Follow-up from January Board Retreat

II. Committee & Task Force Updates (Task Force Leads)

- A.** Executive Finance Committee
- B.** One Stop Committee
- C.** Targeted Populations
- D.** Business and Sector Engagement (BaSE)
- E.** Adult Basic Education & Literacy (ABEL)

III. Board Learning Feature Topics

- A.** Skills USA Short Video
- B.** WorkSource Short Video: Veteran Transition Support

IV. Good of the Order & Announcements

Board Member Activities and Alerts

- **BaSE (Business and Sector Engagement) Committee** comprised of the EDC's and PacMtn Staff met to discuss next steps with updating the Cluster Analysis report. **A draft RFP has been written, and will be released on Monday, March 11th.** We expect a final report to come in the first quarter of the new program year. As a part of the release, PacMtn will work with the committee and the contractor to host a larger community meeting to release the report, and to report out on additional data that impacts the future of our regional workforce. The date is yet to be confirmed.

PacMtn also launched the **Future of Work – Employee Development Program**. Previously, this work was *incumbent worker training*. We have already started receiving requests, and have approved projects in all 5 of the counties. Over the month of March, staff and representatives from the Thurston Chamber, our B2B contractor, will be working to put the final pieces in place to enable employers to host their trainings—developing employees in ways that benefit them, the company, and the economy.

- **Targeted Populations Committee** will have a new senior staff support person beginning March 14. Jage Curl will meet with Kairie and David before Stacey fully retires and be in training over the next number of weeks to familiarize himself with his new areas of responsibility. He will be introduced at the March 28 Board Meeting.
- **Adult Basic Education and Learning (ABEL) Committee** needs a Leader and staff will be working with agencies and individuals in this community of practice to identify a person to sit on the Board. That same individual could lead ABEL or, it could be a different Board Member. Thoughts or discussion on who might be interested and appropriate should be shared with Cheryl or Corinne.

Please see the attached **Performance Targets** for 2018-2019 Title 1 Dislocated, Adult, and Youth Services. PacMtn has historically been a strong performer meeting all targets. The largest hurdle to date has been the MIS system debacles and a complete inability to have confidence in the data and to produce reports for the entities that have historically been required to achieve these outcomes. Direction from the State and Dept. of Labor has been limited on how the other partners who are now also held to this WDA-wide metric—DVR, ABE and Wagner Peyser, to name a few, will be managed in achievement of this metric. New players to the WIOA performance world are challenged even more. Over the next year, the Board will need a strategy as 2020 begins the year when performance may be tied to funding or other monitoring accountabilities.

PacMtn is continuing in an **appeal of Washington State Department of Commerce WorkFirst Request for Qualifications (RFQ)**. They have deemed our application as ineligible for review for failure to submit a Notice of Intent by the due date of that specialized timeline. We met the overall submission timeline, but missed the extra hoop. We cited communication failures and lack of quality

management of the process. We have held that contract nearly 20 years. They acknowledge Pacific Mountain as a valued contractor consistently providing high quality services to WorkFirst participants. We are continuing to ask consideration given that history of performance, but they have been to date unwilling, citing fairness to all who did follow the requirements. The contract represents \$1.6 million annually, with 6 impacted staff. The bid awards are to be announced March 15. We will keep the Board apprised of the outcome of the appeal and our negotiations.

Program News

The Future of Work Task Force is made up a wide range of stakeholders from the legislative branch, the executive branch, state agencies, community and technical colleges, workforce development councils, other education, non-profits, and the private sector. An initial report is now available <http://www.wtb.wa.gov/Documents/FutureofWork2018Report.pdf>. This group is addressing the issue that our talent pipeline development systems (education, training, supports) are designed for a different industrial economy. These systems must transform itself to align with transformations in the economy. "Futureproof" businesses and citizens prepare them to compete in any economy by seizing opportunities to reskill through a lifelong career pathway that is flexible/customizable.

January 15 South Sound Business ran a very positive article celebrating "[Camo2Commerce Program Ends but Impact Remains at JBLM](#)".

PacMtn WDA was recognized for Outstanding Performance (for the quarter ending September 30, 2018). A letter from ESD states "strong performance on the outcomes shown below from your WIOA Title I grants and discretionary contracts. Please thank your entire team for the hard work and professionalism they put into making this happen!"

Outcome	Target	Actual	% of Target
WIOA Adult Employments	98	1,003	1023%
WIOA Adult Enrollments	150	1,330	887%
CCWA Comprehensive Internship	19	22	116%
CCWA Career Connected Learning	136	325	239%

This is the second year in a row the number have been so high. Much of this exceptionally high achievement is owing to the commitment to co-register individuals and to work together with other system partners located in the WorkSource.

Changing Lives

Recently the **Shelton McDonald's** tore down and rebuilt their store and the Mason team stepped up to meet and exceed their hiring needs. An ESD staff reached out to the Project Manager and referred the opportunity to the Business Solutions Coordinator. The Mason team handed out 100 applications and over the days of December 12, 13, 19 & 20 there were 93 interviews at the WorkSource center

CEO HIGHLIGHTS

March 2019

and 21 were hired. WorkSource also served as an orientation/training pickup site for the youth who were hired and 43% of those hired had engaged with WorkSource before and/or were in programs. For those not hired, the team discussed an outreach plan to recruit those job seekers to provide additional services.

Letter **applauding My JOB staff...** "In my position as Attendance Secretary at Green Hill Academic School, I have observed the MyJOB program in action on our campus. Instructors Immanuel Garraway and Camden Sahlinger have developed a good rapport with residents. I am impressed with the lessons, direction and encouragement they offer to students. The experience of writing a resume and cover letters is developing important skills for these young men. Thank you for your part in providing this excellent opportunity to our residents."

Shelton School hosts Construction Skills USA

https://drive.google.com/file/d/1Rk1E59_1zpcCh-AHWeR4eR47HZgVFglx/view?usp=sharing



STATE OF WASHINGTON
WORKFORCE TRAINING AND EDUCATION COORDINATING BOARD

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05 October 2018

Cheryl Fambles
Chief Executive Officer
Pacific Mountain Workforce Development Council
150 Irving Street SW
Tumwater, WA 98512
(360) 704-3568
cheryl@pacmtn.org

Dear Cheryl Fambles,

This letter finalizes the agreed upon Program Year 2018 and 2019 Workforce Innovation and Opportunity Act (WIOA) performance targets for the Pacific Mountain Workforce Development Council in Washington. Following a review of the proportionate adjustment models based on a baseline of state-level performance targets, data supporting the proposed local performance targets, and subsequent discussions with State staffs and local area representatives, we are confirming the final performance targets as follows:

WIOA Adult

Performance Measure	2018 Proposed Target	2019 Proposed Target
Employment Rate 2 nd Quarter After Exit	66.2%	67.1%
Employment Rate 4 th Quarter After Exit	65.5%	66.4%
Median Earnings 2 nd Quarter After Exit	\$4,736	\$5,036
Credential Attainment Rate 2 nd Quarter After Exit	61.4%	63.4%

WIOA Dislocated Worker

Performance Measure	2018 Proposed Target	2019 Proposed Target
Employment Rate 2 nd Quarter After Exit	60.5%	61.3%
Employment Rate 4 th Quarter After Exit	57.9%	58.7%
Median Earnings 2 nd Quarter After Exit	\$6,094	\$6,444
Credential Attainment Rate 2 nd Quarter After Exit	64.8%	66.8%

WIOA Youth

Performance Measure	2018 Proposed Target	2019 Proposed Target
Employment Rate 2 nd Quarter After Exit	55.2%	56.1%
Employment Rate 4 th Quarter After Exit	52.1%	52.9%
Credential Attainment Rate 2 nd Quarter After Exit	51.7%	52.7%

Eleni Papadakis, Executive Director – Workforce Training and Education Coordinating Board

For any questions or concerns, please contact Dave Wallace at dave.wallace@wtb.wa.gov



MEMORANDUM

To: PacMtn WDC Executive Finance Committee

From: Bridget Lockling, Director of Finance & Administrative Services

Date: February 1, 2019

Subject: Current Fiscal Items for Review and Discussion

1st Quarter Financial Statements

Financial Statements are provided to reflect activity through September 30, 2018. First quarter expenditures are in line with projected spending and no major deviations or concerns are apparent at this time.

Our Statement of Financial Position reflects an increase to Net Assets due to first quarter earnings in our payment point programs – Community Jobs and MyJOB.

Recommendation: Motion to approve the PY18 1st Quarter Financial Statements

PY17 Audit Update

The State Auditor's Office conducted their onsite audit from December 10th through January 10th. This audit included review of our WIOA 'Cluster' and our WorkFirst grant. The estimated cost of this audit is almost \$28,000, which is more than the anticipated \$25,000 in our PY18 budget. This is partly due to the added review of WorkFirst which was supposed to occur last year but because of subrecipient determination status issues was not able to be completed. The final audit report is still under finalization by their audit manager but initial feedback and results provided by the auditor on site there were no major issues or findings. All items of concern from last year have been addressed and corrected. An exit conference will be held on February 19th at 11am.

PY18 Program and Fiscal Monitoring Update

The Employment Security Department program and fiscal monitoring team was on site from January 7th through the 16th. They completed an extensive review of our WIOA formula and discretionary grants. They identified areas in case file documentation that needs improvement, policy language that needs updating and contract language that needs to match federal requirements. There were a few items still under review and discussion. They will send a draft report within 30 days.

Fiscal Department Staff Changes

After some recent staff turnover in the fiscal department, we analyzed the workload and structure of the department to determine necessary improvements. To better serve the organization needs and be responsive to the growing work and requirements, the current Senior Accounting Specialist position will be eliminated and replaced by an Administrative Coordinator and a Financial Services Specialist. This change will help create efficiencies in processes and respond to the increasing needs on both the financial and administration side, specifically in supporting human resource needs. Currently a temp accountant is filling the gap and recruitment for these positions will start in the near future.

Pacific Mountain Workforce Development Council

NOTES TO FINANCIAL STATEMENTS

Program Year July 1, 2018 through June 30, 2019

For month ending September 30, 2018

These notes pertain to the Statement of Activities, Statement of Financial Position and Statement Cash Flows attached.

- 1) The Statement of Activities provides a summary of expenses compared to revenue earned for the period, reported on an accrual basis (pgs 2-3). This is then compared with current period budgets and year to date budgets. More emphasis will be placed on year to date spending rather than on a monthly basis because timing may be off slightly from month to month from last year. The budgeted numbers reflect

AREAS OF NOTE:

- a) WIOA Formula contractor spending is at expected levels through the first quarter.
- b) The Incumbent Worker Training for childcare program was restricted but they were not able to spend out their contract budget.
- c) Career Connect contracts were still under development the first quarter, programs will ramp up activities in the coming months.
- d) All In house program spending is within expected ranges for year to date.
- e) High Impact Community grants that were extended through the first quarter of PY18 came in under budget. The next round of HIC grants will begin late winter.
- f) All categories in the admin office budget are coming in at or below budget.

- 2) Page 5 represents a summary of spending levels by grant compared to total budgeted amounts available. This is further sectioned according to source of funds. Grant expenditures will be watched to make sure they are meeting expected spending goals and requirements

- 3) The Statement of Financial Position represents the organizations net assets, comparing current assets and liabilities. We currently have net assets of \$967,216. Net assets have increased by \$39,647 since last quarter due to gains in our payment point programs.

- 4) The Statement of Cash Flows represents the cash received and used during the time period. This reflects we have sufficient cash on hand to handle our daily operating transactions. Our cash balances are higher due to better timing of drawdowns and shorter delays on reimbursements from some grants. Purchases of equipment reflects the new cubicle system in the admin office. There is a 2 day turnaround time for cash requests to the State for our WIOA Formula fund reimbursements and a 1 day turnaround for cash requests made to Department of Labor. Cash requests for the WorkFirst grant take one to two weeks, while some of our smaller grants are only reimbursed on a monthly basis. We keep enough unrestricted funds available for use to cushion gaps in reimbursement times.

Pacific Mountain Workforce Development Council

STATEMENT OF ACTIVITIES

PY18 Budget to Actual Report

<i>For month end September 2018</i>	Current Year Actual	Current Year Budget	Variance	Total Budget	Balance Remaining	% Spent	Target %
REVENUES							
Grant & Contracts	2,611,144.50	3,188,379.01	577,234.51	15,023,097.56	12,411,953.06	17%	21%
Other	-	-	-	-	-	0%	0%
Total Revenues	2,611,144.50	3,188,379.01	577,234.51	15,023,097.56	12,411,953.06	17%	21%
EXPENSES							
Program Services							
Direct Participant Services	1,893,586.71	2,387,519.57	493,932.86	10,787,832.39	8,894,245.68	18%	22%
Business Services & Solutions	166,381.31	200,150.56	33,769.25	600,301.11	433,919.80	28%	33%
Special Impact Projects	38,473.27	73,834.15	35,360.88	279,192.61	240,719.34	14%	26%
Misc Contracts & Projects	124.15	11,250.00	11,125.85	95,000.00	94,875.85	0%	12%
Subtotal	2,098,565.44	2,672,754.28	574,188.84	11,762,326.11	9,663,760.67	18%	23%
Administrative Services							
Admin Office Operations	428,125.92	467,335.06	39,209.14	1,879,929.08	1,451,803.16	23%	25%
Transition Activities	22,100.60	17,039.67	(5,060.93)	68,158.69	46,058.09	32%	25%
Integrated Service Activities	22,501.30	31,250.00	8,748.70	125,000.00	102,498.70	18%	25%
AmeriCorps Activities	-	-	-	-	-	#DIV/0!	#DIV/0!
Subtotal	472,727.82	515,624.73	42,896.91	2,073,087.77	1,600,359.95	23%	25%
TOTAL EXPENSES	2,571,293.26	3,188,379.01	617,085.75	13,835,413.88	11,264,120.62	19%	23%
Change in Net Assets	39,851.24	-	(39,851.24)	1,187,683.68			

<i>Beginning Net Assets</i>	927,569
<i>Plus current Net Assets</i>	39,851
<i>Change in special funds</i>	<u>(204)</u>
<i>Ending Net Assets W/O Donor Restrictions</i>	<u>967,216</u>

Pacific Mountain Workforce Development Council

STATEMENT OF ACTIVITIES

Expense Detail

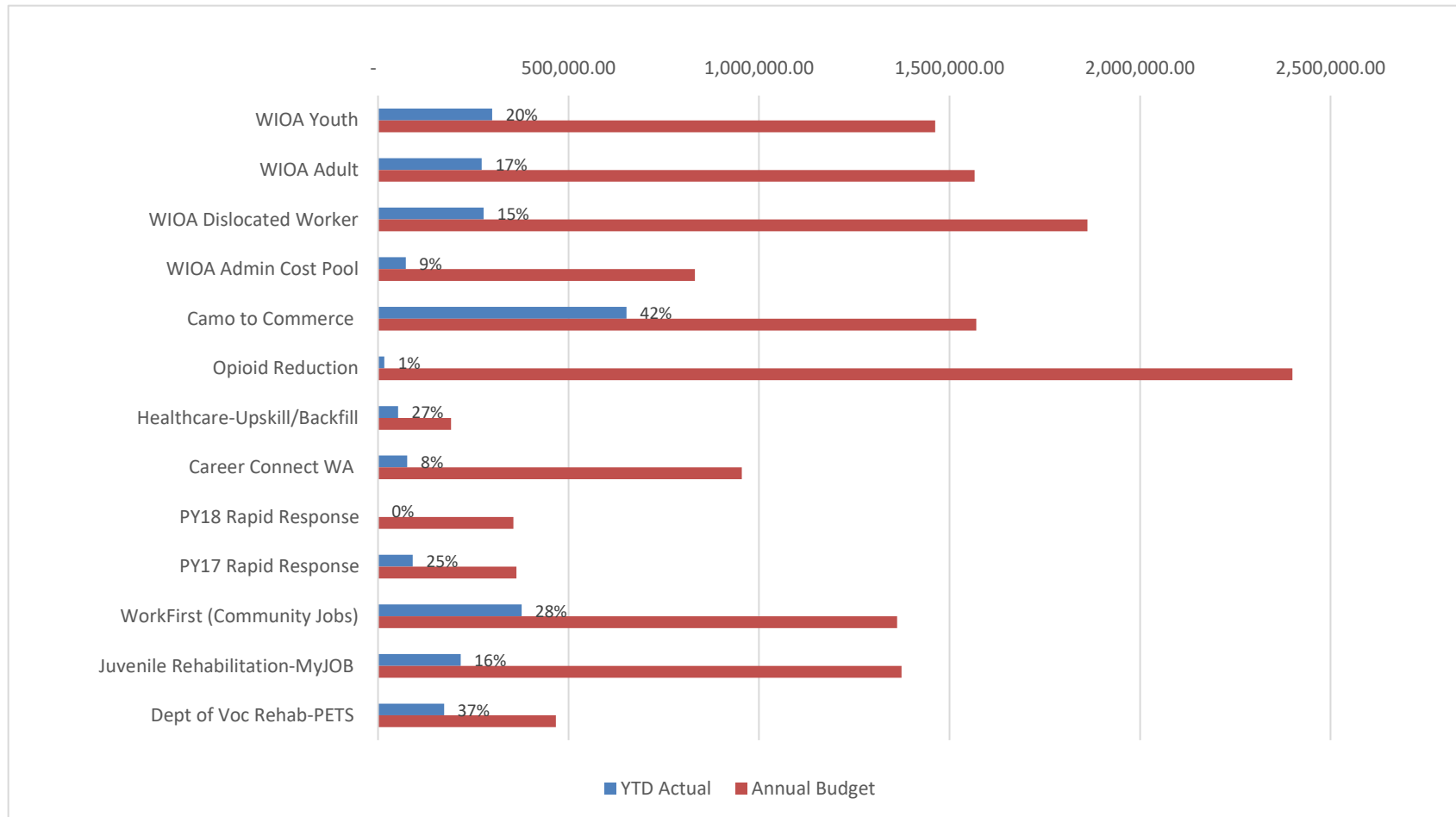
PY18 Budget to Actual Report

<i>For month end September 2018</i>	Current Period Actual	Current Period Budget	Variance	Current Year Actual	Current Year Budget	Variance	Total Budget	Balance Remaining	% Spent	Target %
REVENUES										
Grant & Contracts	902,233.97	1,066,249.17	164,015.20	2,611,144.50	3,188,379.01	577,234.51	15,023,097.56	12,411,953.06	17%	21%
Other	-	-	-	-	-	-	-	-	0%	0%
Total Revenues	902,233.97	1,066,249.17	164,015.20	2,611,144.50	3,188,379.01	577,234.51	15,023,097.56	12,411,953.06	17%	21%
EXPENSES										
PROGRAM SERVICES										
Direct Participant Services										
Adult Contracted Programs (Career Path Services-CPS)	58,557.53	69,255.83	10,698.30	178,030.71	207,767.50	29,736.79	831,070.00	653,039.29	21%	25%
Dislocated Worker Contracted Programs (CPS)	68,744.57	82,878.00	14,133.43	187,623.24	248,634.00	61,010.76	994,536.00	806,912.76	19%	25%
Youth Contracted Programs (ResCare)	74,064.41	83,377.03	9,312.62	231,491.12	250,131.10	18,639.98	1,000,524.41	769,033.29	23%	25%
Incumbent Worker Training (CCAC)	889.85	8,250.96	7,361.11	11,433.03	24,250.96	12,817.93	24,250.96	12,817.93	47%	100%
Incumbent Worker Training Business Grants	-	-	-	-	-	-	150,000.00	150,000.00	0%	0%
Grays Harbor Foundation (CPS)	139.41	129.72	(9.69)	139.41	389.15	249.74	1,556.59	1,417.18	9%	25%
Rapid Response Increased Employment (CPS)	4,576.47	7,136.93	2,560.46	12,221.18	21,410.78	9,189.60	85,643.11	73,421.93	14%	25%
Rapid Response Increased Employment (ResCare)	8,747.84	9,768.08	1,020.24	32,967.17	29,304.24	(3,662.93)	117,216.95	84,249.78	28%	25%
TAP-Healthcare (SPSCC, Centralia College)	41,593.97	21,279.12	(20,314.85)	47,949.58	63,837.37	15,887.79	191,512.10	143,562.52	25%	33%
Career Connect WA (CPS, ResCare, ESD113, AJAC)	54,557.83	52,360.00	(2,197.83)	67,963.58	157,080.00	89,116.42	701,933.36	633,969.78	10%	22%
Workforce Central-C2C	79,625.21	30,285.61	(49,339.60)	107,193.32	90,856.84	(16,336.48)	181,713.68	74,520.36	59%	50%
Choice Regional Health	-	-	-	-	-	-	1,100,000.00	1,100,000.00	0%	0%
DVR-Morningside & Arc of Grays Harbor	-	53,000.00	53,000.00	158,435.00	159,000.00	565.00	179,563.00	21,128.00	88%	89%
In House Programs										
WorkFirst	91,172.11	97,427.03	6,254.92	301,180.03	292,281.09	(8,898.95)	1,169,124.34	867,944.31	26%	25%
PREP	7,522.78	8,792.86	1,270.08	26,499.58	26,378.58	(121.01)	52,757.15	26,257.57	50%	50%
C2C, JBLM	136,114.44	171,970.24	35,855.80	376,341.13	515,910.73	139,569.60	1,643,128.45	1,266,787.32	23%	31%
OURR	1.91	2,000.00	1,998.09	1.91	2,000.00	1,998.09	988,653.00	988,651.09	0%	0%
JRA-MyJob	53,056.13	91,697.42	38,641.29	147,142.50	275,092.25	127,949.75	1,100,369.00	953,226.50	13%	25%
Career Connect Work Based Learning	865.67	5,565.00	4,699.33	890.76	16,695.00	15,804.24	83,483.72	82,592.96	1%	20%
Systems Navigation	6,083.46	6,500.00	416.54	6,083.46	6,500.00	416.54	190,796.57	184,713.11	3%	3%
Subtotal Direct Participant Services	686,313.59	801,673.83	115,360.24	1,893,586.71	2,387,519.57	493,932.86	10,787,832.39	8,894,245.68	18%	22%
Business Services										
B2B-(Thurston County Chamber)	30,284.31	33,333.33	3,049.02	86,211.19	100,000.00	13,788.81	400,000.00	313,788.81	22%	25%
B2B-C2C (TCC)	17,875.84	24,583.68	6,707.84	53,233.57	73,751.05	20,517.48	147,502.10	94,268.53	36%	50%
C2C-(Tacoma Pierce Chamber)	8,778.40	8,799.84	21.44	26,936.55	26,399.51	(537.04)	52,799.01	25,862.46	51%	50%
Subtotal Business Services	56,938.55	66,716.85	9,778.30	166,381.31	200,150.56	33,769.25	600,301.11	433,919.80	28%	33%
Special Impact Projects										
WBL/Uplift! Coordination	7,213.32	8,333.33	1,120.01	24,251.79	25,000.00	748.21	100,000.00	75,748.21	24%	25%
AmeriCorps	465.27	2,278.05	1,812.78	2,038.42	6,834.15	4,795.73	27,336.61	25,298.19	7%	25%
Pierce County Career Days	-	5,000.00	5,000.00	-	15,000.00	15,000.00	25,000.00	25,000.00	0%	60%
High Impact Community Projects	9,288.06	7,000.00	(2,288.06)	12,183.06	27,000.00	14,816.94	126,856.00	114,672.94	10%	21%
	-	-	-	-	-	-	-	-	#DIV/0!	#DIV/0!
Subtotal Special Impact Projects	16,966.65	22,611.38	5,644.73	38,473.27	73,834.15	35,360.88	279,192.61	240,719.34	14%	26%
Misc Contracts/Projects										
Outreach & Communications	-	2,500.00	2,500.00	124.15	7,500.00	7,375.85	30,000.00	29,875.85	0%	25%
Industry Cluster Study	-	-	-	-	-	-	50,000.00	50,000.00	0%	0%
SeaKing-JRA/MyJOB	-	1,250.00	1,250.00	-	3,750.00	3,750.00	15,000.00	15,000.00	0%	25%
Subtotal Misc Contracts/Projects	-	3,750.00	3,750.00	124.15	11,250.00	11,125.85	95,000.00	94,875.85	0%	12%
SUBTOTAL PROGRAM SERVICES	760,218.79	894,752.07	134,533.28	2,098,565.44	2,672,754.28	574,188.84	11,762,326.11	9,663,760.67	18%	23%
ADMINISTRATIVE SERVICES										
Administrative Office Operations										
Salaries & Benefits										
Salaries	81,806.35	82,779.86	973.51	248,247.06	250,312.02	2,064.96	1,004,120.13	755,873.07	25%	25%
Benefits	29,935.07	33,181.44	3,246.37	93,310.30	100,030.29	6,719.99	423,277.95	329,967.65	22%	24%
Total Salaries & Benefits	111,741.42	115,961.30	4,219.88	341,557.36	350,342.31	8,784.95	1,427,398.08	1,085,840.72	24%	25%
Travel & Training Expenses										

Mileage	93.57	500.00	406.43	704.78	1,500.00	795.22	6,000.00	5,295.22	12%	25%
Travel	3.71	1,250.00	1,246.29	708.86	3,750.00	3,041.14	15,000.00	14,291.14	5%	25%
Conf/Conv/Mtgs/Reg	113.43	2,550.00	2,436.57	(468.00)	3,650.00	4,118.00	11,100.00	11,568.00	-4%	33%
Gasoline for PMWDC Vehicles	27.50	66.67	39.17	142.06	200.00	57.94	800.00	657.94	18%	25%
Board Travel	-	1,241.67	1,241.67	-	1,325.00	1,325.00	10,800.00	10,800.00	0%	12%
Board Supplies & Support	-	75.00	75.00	306.24	225.00	(81.24)	10,400.00	10,093.76	3%	2%
Staff develop/Training	-	750.00	750.00	-	2,250.00	2,250.00	9,000.00	9,000.00	0%	25%
Total Staff Expenses	238.21	6,433.33	6,195.12	1,393.94	12,900.00	11,506.06	63,100.00	61,706.06	2%	20%
Professional Services										
Accounting & Auditing	-	-	-	-	-	-	45,000.00	45,000.00	0%	0%
Legal Fees	-	300.00	300.00	-	900.00	900.00	3,600.00	3,600.00	0%	25%
Professional Services/Consult	11,061.77	7,383.33	(3,678.44)	18,424.39	22,150.00	3,725.61	88,600.00	70,175.61	21%	25%
Temp & Interim Contracts	-	208.33	208.33	-	625.00	625.00	2,500.00	2,500.00	0%	25%
Licenses	1,524.18	2,233.33	709.15	3,166.92	6,700.00	3,533.08	26,800.00	23,633.08	12%	25%
Total Professional Services	12,585.95	10,125.00	(2,460.95)	21,591.31	30,375.00	8,783.69	166,500.00	144,908.69	13%	18%
Facilities										
Rent	6,896.95	7,440.08	543.13	20,765.25	22,320.25	1,555.00	89,281.00	68,515.75	23%	25%
Utilities	-	-	-	-	-	-	-	-	#DIV/0!	#DIV/0!
Total Facilities	6,896.95	7,440.08	543.13	20,765.25	22,320.25	1,555.00	89,281.00	68,515.75	23%	25%
Supplies & Communications										
Supplies	161.52	1,041.67	880.15	1,302.46	3,125.00	1,822.54	12,500.00	11,197.54	10%	25%
Telephone & telecomm	1,049.84	1,229.17	179.33	2,703.88	3,687.50	983.62	14,750.00	12,046.12	18%	25%
Postage & Shipping	-	62.50	62.50	100.00	187.50	87.50	750.00	650.00	13%	25%
Mailing Services	-	33.33	33.33	11.80	100.00	88.20	400.00	388.20	3%	25%
Printing & copying	219.10	375.00	155.90	843.30	1,125.00	281.70	4,500.00	3,656.70	19%	25%
Books/Subscriptions/Ref	32.10	141.67	109.57	978.24	1,025.00	46.76	1,700.00	721.76	58%	60%
Total Communications	1,462.56	2,883.33	1,420.77	5,939.68	9,250.00	3,310.32	34,600.00	28,660.32	17%	27%
Equipment/Maintenance/Software/Rental										
IT Supplies/Minor Equipment/Tech Equip	371.87	5,708.33	5,336.46	7,821.07	9,125.00	1,303.93	12,500.00	4,678.93	63%	73%
Equipment Rental & maint	124.98	135.00	10.02	377.48	405.00	27.52	1,620.00	1,242.52	23%	25%
Auto Repair & Maintenance	-	166.67	166.67	96.65	500.00	403.35	2,000.00	1,903.35	5%	25%
Auto Lease	215.68	233.33	17.65	649.55	700.00	50.45	2,800.00	2,150.45	23%	25%
Total Equipment/Small Tools	712.53	6,243.33	5,530.80	8,944.75	10,730.00	1,785.25	18,920.00	9,975.25	47%	57%
Depreciation										
Depreciation-Automobile	1,924.45	2,077.50	153.05	1,924.45	2,077.50	153.05	8,310.00	6,385.55	23%	25%
Deprec & amort - other	-	-	-	-	-	-	-	-	#DIV/0!	#DIV/0!
Total Depreciation	1,924.45	2,077.50	153.05	1,924.45	2,077.50	153.05	8,310.00	6,385.55	23%	25%
Other										
Interest-general/Bank Fees	-	400.00	400.00	-	1,200.00	1,200.00	4,800.00	4,800.00	0%	25%
Insurance-Gen Liability	1,486.05	1,666.67	180.62	4,474.19	5,000.00	525.81	20,000.00	15,525.81	22%	25%
Membership Dues	384.70	170.00	(214.70)	12,058.80	13,640.00	1,581.20	15,770.00	3,711.20	76%	86%
Notifications	122.12	166.67	44.55	308.25	500.00	191.75	2,000.00	1,691.75	15%	25%
Other Expenses	13.00	83.33	70.33	2,026.00	2,250.00	224.00	3,000.00	974.00	68%	75%
Community Outreach/Ed	2,500.00	2,500.00	-	8,500.00	7,500.00	(1,000.00)	30,000.00	21,500.00	28%	25%
Contractor Support/In Kind	16.78	-	(16.78)	166.80	-	(166.80)	-	(166.80)	#DIV/0!	#DIV/0!
Transfer to Unrestricted	(1,283.90)	(750.00)	533.90	(1,524.86)	(750.00)	774.86	(3,750.00)	(2,225.14)	41%	20%
Total Other	3,238.75	4,236.67	997.92	26,009.18	29,340.00	3,330.82	71,820.00	45,810.82	36%	41%
Subtotal Admin Office Operating Budget	138,800.82	155,400.55	16,599.73	428,125.92	467,335.06	39,209.14	1,879,929.08	1,451,803.16	23%	25%
Transition & AJC Activities	5,907.81	5,679.89	(227.92)	22,100.60	17,039.67	(5,060.93)	68,158.69	46,058.09	32%	25%
One Stop Operator	8,199.49	10,416.67	2,217.18	22,501.30	31,250.00	8,748.70	125,000.00	102,498.70	18%	25%
	-	-	-	-	-	-	-	-	0%	0%
SUBTOTAL ADMINISTRATIVE SERVICES	152,908.12	171,497.11	18,588.99	472,727.82	515,624.73	42,896.91	2,073,087.77	1,600,359.95	23%	25%
TOTAL EXPENSES	913,126.91	1,066,249.17	153,122.26	2,571,293.26	3,188,379.01	617,085.75	13,835,413.88	11,264,120.62	19%	23%
Change in Net Assets	(10,892.94)	-	10,892.94	39,851.24	-	(39,851.24)	1,187,683.68			
<i>Beginning Net Assets</i>	<i>976,712</i>			<i>927,569</i>						
<i>Plus current Net Assets</i>	<i>(10,893)</i>			<i>39,851</i>						
<i>Change in special funds</i>	<i>1,397</i>			<i>(204)</i>						
<i>Ending Net Assets Without Donor Restrictions</i>	<i>967,216</i>			<i>967,216</i>						

Pacific Mountain Workforce Development Council
Grant Balance by Program
PY18 Budget to Actual Report

Through September 30, 2018



Pacific Mountain Workforce Development Council
STATEMENT OF FINANCIAL POSITION *(Balance Sheet)*

September 30, 2018

	Beginning Year Balance	Current Period Balance	<i>Current Year Change</i>	Beginning Period Balance	<i>Current Period Change</i>
Assets					
Cash & Cash Equivalents	291,256	315,725	24,469	247,907	67,818
Accounts Receivable	1,912,240	1,648,236	(264,004)	1,636,273	11,963
Due from Related Parties	0	0	0	0	0
Notes Receivable	0	0	0	0	0
Pre-Paid Expenses	32,402	44,300	11,898	27,734	16,566
Investments - CD's	226,655	227,341	686	227,117	224
Long-Term Assets	<u>31,133</u>	<u>28,232</u>	(2,901)	<u>31,133</u>	(2,901)
Total Assets	<u>2,493,686</u>	<u>2,263,834</u>	(229,852)	<u>2,170,164</u>	<u>93,670</u>
Liabilities					
Contracts & Vendors Payable	1,179,643	900,577	(279,066)	795,449	105,128
Payroll, Taxes, & Benefits Payable	266,673	276,544	9,871	278,078	(1,534)
Paid Leave Payable	104,401	102,853	(1,548)	101,430	1,423
Deferred Revenues	6,457	6,457	0	6,457	0
Other Short-Term Payables	<u>8,943</u>	<u>10,187</u>	<u>1,244</u>	<u>12,038</u>	(1,851)
Total Liabilities	<u>1,566,117</u>	<u>1,296,618</u>	(269,499)	<u>1,193,452</u>	<u>103,166</u>
Net Assets without donor restrictions	<u>927,569</u>	<u>967,216</u>	<u>39,647</u>	<u>976,712</u>	(9,496)
Total Net Assets	<u>927,569</u>	<u>967,216</u>	<u>39,647</u>	<u>976,712</u>	<u>(9,496)</u>
Total Liabilities and Net Assets	<u>2,493,686</u>	<u>2,263,834</u>	(229,852)	<u>2,170,164</u>	<u>93,670</u>

Pacific Mountain Workforce Development Council
STATEMENT OF CASH FLOWS

September 30, 2018

	<u>Current Period</u>	<u>Current Year</u>
Cash Flows from Operating Activities		
Receipts from Grants	890,270.80	2,875,148.62
Receipts from Contributors/Events	3,500.00	3,810.14
Depreciation (Net)	0.00	0.00
Payments to Suppliers	47,000.11	(428,973.39)
Payments to Employees	(309,393.72)	(910,259.08)
Payments to Program/Participant Activities	(563,558.93)	(1,515,257.57)
Total Cash Flows from Operating Activities	<u>67,818.26</u>	<u>24,468.72</u>
Cash Flows from Investing Activities		
Purchases of Equipment/Assets	0.00	0.00
Proceeds from Sale of Current Assets	0.00	0.00
Interest and Dividends	224.01	686.25
Purchases or Redemptions of Investments	(224.01)	(686.25)
Total Cash Flows from Investing Activities	<u>0.00</u>	<u>0.00</u>
Beginning Cash & Cash Equivalents	<u>247,906.60</u>	<u>291,256.14</u>
Ending Cash & Cash Equivalents	<u>315,724.86</u>	<u>315,724.86</u>

PacMtn Program Policies – Development, Change and Updates Summary

As a Local Workforce Development Board, PacMtn WDC is responsible for ensuring that our program policies provide the information and guidance necessary for staff and our partner service providers to carry out the delivery of services (directly or indirectly) to customers in our region. All guidance as developed is in alignment with WIOA Regulations and all applicable operational guidance provided by both the Department of Labor (DOL), and that of the Employment Security Department.

Periodically WIOA Regulations or other subsequent operational guidance which has been or will be provided in the future by the Department of Labor (DOL), and/or of the Employment Security Department, will warrant the development of a new local area policy or necessitate an update to one of our existing PacMtn policies be in alignment.

The development and introduction of new policies or policy updates are processed as determined necessary upon the receipt of any new guidance. Therefore, such actions are then presented to the board for approval on a quarterly schedule unless the change necessitates otherwise.

New Policies for Approval:

The following provides a brief explanation of the need and the PacMtn’s justification to develop and request approval of these new policies.

PacMtn Program Policies - New Policy Creation

Program Policy – Opioid Use Reduction and Recovery (OURR) Policy #8000

Policy Development Justification:

Workforce Innovation and Opportunity Act (WIOA)

Training and Employment Guidance Letter (TEGL) 12-17: National Health Emergency Dislocated Worker Demonstration Grants to Address the Opioid Crisis

Under the authority of section 169(c) of WIOA and as outlined in TEGL 12-17, funds allocated for the National Health Emergency Dislocated Worker Demonstration Grants to Address the Opioid Crisis may be used for training and support activities for dislocated workers, incumbent workers, and new entrants in the workforce related to addressing the economic and workforce impacts of the opioid epidemic.

PacMtn has received such funds and has named the local project Opioid Use Reduction and Recovery (OURR) Alliance. To allow for and facilitate Opioid Use Reduction and Recovery relationships and services at the local level within the PacMtn WDA, PacMtn has developed a local policy to allow for such relationships and service related activities within our area.

PacMtn WorkSource Policy: Representation and Customer Referral

Policy Development Justification:

Workforce Innovation and Opportunity Act (WIOA)

Training and Employment Guidance Letter (TEGL) 16-16

TEGL 16-16 clarifies that “providing career services does not mean that each required partner must provide these services directly on-site at a comprehensive American Job Center”. It does specify that career services must be provided directly on-site through access to one-stop partner programs and activities, which, as described in 20 CFR 678.305(d), 34 CFR 361.305(d), and 34 CFR 463.305(d), may be delivered in three ways:

- Having program staff physically present at the American Job Center;
- Having staff from a different physically present partner *appropriately trained* to provide information to customers about the programs, services, and activities available through all partner programs; or
- Providing direct linkage through technology to a program staff member who can provide meaningful information or services.

Each WDC, with the required partners and one-stop operator(s), is required to establish how access to partner programs will be provided and to document this in the local Memoranda of Understanding (MOUs). The frequency of program staff’s physical presence in an affiliated site is to be determined through local MOU negotiations, within the parameters of at 20 CFR 678.310-78.320, 34 CFR 361.310-361.320, and 34 CFR 463.310-463.30



PACMTN WORKSOURCE POLICY: ON-SITE REPRESENTATION AND CUSTOMER REFERRAL

Type: PacMtn-WorkSource System Policy

Date Established:

Date Last Revised:

Date Posted to Website:

Status: Draft

Supersedes: N/A

Purpose

To clarify the expectations of the PacMtn Workforce Development Council (WDC) for required partners to be represented at WorkSource/American Job Center sites and provide access to their services under the Workforce Innovation and Opportunity Act (WIOA) and federal and state policy.

Definitions:

- **Required Partner** – those federally funded programs that must make their services accessible through the WorkSource/American Job Center (AJC) one-stop system as required by WIOA. A complete list of required partners is included in Appendix A.
- **Mandated Partner** –WIOA Titles I through IV and TANF (WorkFirst) as defined in state policy #5612 One-Stop Evaluation and Certification.
- **Career Services** – services defined by WIOA and provided by the one-stop system to help job seekers become employed and maintain work. There are three types of “career services”: basic career services, individualized career services, and follow-up services. Career services may be provided in any order; there is no sequence requirement for these services. A full list of career services appears in Appendix B.
- **Direct linkage** - providing a direct connection within a reasonable time, by phone or through a real-time Web-based communication, to a program staff member who is not located at the site who can provide program information or services, including career services, to the customer. Solely providing a phone number, Web site, information, pamphlets, or materials does not constitute direct linkage (TEGL 16-16).
- **Infrastructure Funding Agreement (IFA)** – the component of the Memorandum of Agreement (MOU) that shows how the required partners fund the WorkSource/American Job Center system in the workforce region.
- **Memorandum of Understanding (MOU)** – the operating agreement among the required partners, WDC and Chief Elected Officials, including the IFA.

Background

Access to a full array of high-quality workforce services is at the heart of WIOA and the primary rationale for creating a one-stop system. Federal law and policy define a comprehensive one-stop center [AJC] as “a physical location where job seekers and employer customers **can access** the programs, services, and

activities of all required one-stop partners, along with any additional partners as determined by the Local WDB” (WIOA section 121(b)(1)(B), TEGL 16-16).

WIOA specifies that at least one WIOA title I staff must be physically present at a comprehensive AJC. WIOA requires title III Wagner-Peyser Act to be “co-located in comprehensive and/or affiliate American Job Centers” and requires staff from at least one additional partner be physically present more than 50% of the time the site is open. Local veterans’ employment, disabled veterans’ outreach, or unemployment compensation programs do not count as the partner for purposes of this requirement.

TEGL 16-16 clarifies that “providing career services does not mean that each required partner must provide these services directly on-site at a comprehensive American Job Center”. It does specify that career services must be provided directly on-site through access to one-stop partner programs and activities, which, as described in 20 CFR 678.305(d), 34 CFR 361.305(d), and 34 CFR 463.305(d), may be delivered in three ways:

- Having program staff physically present at the American Job Center;
- Having staff from a different physically present partner *appropriately trained* to provide information to customers about the programs, services, and activities available through all partner programs; or
- Providing direct linkage through technology to a program staff member who can provide meaningful information or services.

Each WDC, with the required partners and one-stop operator(s), is required to establish how access to partner programs will be provided and to document this in the local Memoranda of Understanding (MOUs). The frequency of program staff’s physical presence in an affiliated site is to be determined through local MOU negotiations, within the parameters of at 20 CFR 678.310-78.320, 34 CFR 361.310-361.320, and 34 CFR 463.310-463.320.

[Washington WorkSource Policy #5612](#) requires that comprehensive one-stop centers provide basic and individualized career services, training services and business services, and have “**representation of five mandated partners (WIOA Titles I-IV, TANF) on site.**” The policy also specifies that affiliate sites must provide basic career services and representation of at least one required partner. However, state policy does not define “representation”. WIOA allows each WDC to set higher standards of representation than those required by state policy or federal law. Connection Sites are a unique Washington approach to delivering services, and as such are not addressed by WIOA. State policy only specifies that these sites must provide basic career services.

Ideally, customers should be able to access all the services they need in “one-stop” – without travelling for appointments, etc. While the obvious way to achieve this level of access is for staff from all required partners to provide services on-site, this is be unrealistic, expensive and potentially duplicative. This policy clarifies the expectations for required and other partners to participate in WorkSource/American Job Centers, Affiliates, and Connection Sites in the PacMtn Region.

Policy

It is the policy of the WDC to provide the maximum access to services to current and potential customers of the WorkSource/AJC system in the PacMtn Region. The expectations set forth in this policy represent a floor (base level expectations) not a ceiling (ideal state). WorkSource/AJC sites and required and other partners are expected to meet the expectations set forth in this policy and to work to exceed them in order to assure maximum access to services for all customers.

Policy Guidelines

- **WorkSource/AJC Center(s):**
 - All of the required partners identified in state policy must provide access to the career services on-site at the center. This may be accomplished by providing services
 - in-person - one-on-one, in small groups, in workshops/classes,
 - through cross training of on-site staff, or
 - by direct linkage, including video conferencing or video trainings, etc.
 - All of the state mandatory partners will be represented on site as follows:
 - At least 1 staff funded with WIOA title I resources must be physically on-site at the center during operating hours and available to provide services to customers.
 - Title II services will be represented on site in person, via cross training of on-site staff from other programs and/or by direct linkage, as appropriate based on the services funded under WIOA and state funds.
 - At least 1 WIOA title III staff must be physically on-site at the center during operating hours and available to provide services to customers.
 - Titles IV will have at least one staff on-site during hours of operation.
 - TANF/Workforce will have at least one staff on-site during hours of operation.
 - The specifics of how each partner will provide access to its career services will be spelled out in center site agreement component of the IFA.
 - The site agreement will specify which of the career services provided by each partner will be offered on-site, via cross training or by direct linkage to meet the needs of the customers accessing the center.
 - The center(s) and required partners will work together to increase access to services from all required partners over time.

- **Affiliate(s):**
 - At least 1 WIOA title III staff must be physically on-site at an affiliate during operating hours and available to provide services to customers.
 - At least 1 title I partner must be physically on-site at an affiliate site 50% or more of the time.
 - All other partners will be on-site at the affiliate as appropriate based on their services require by customers.
 - Basic career services must be provided to customer on-site.
 - Affiliate site agreements should spell out who is on-site and which services are provided on-site, via cross trained staff or by direct linkage.

- **Connection Site(s):**
 - Must provide access to basic career services on-site, via cross trained staff, or by direct linkage, as documented in a site agreement.
 - WIOA required partners representation is not required on-site.

- **Commitment to Access:** PacMtn has a longer-term goal of increasing the use of technology to assure that customers have access to the full array of services regardless of which site they choose to access. The use of technology should not replace the minimum expectations set forth in in this policy, and should meet the standards for direct linkage, as applicable.

TITLE: WIOA Begin Here

References

Begin Here – If Applicable

DATE APPROVED: TBD

Direct Inquiries to:
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1570 Irving Street SW Tumwater, WA 98512
Telephone: (360) 704-3568
Email: Info@pacmtn.org

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MEMORANDUM

To: PacMtn Board Members

From: Cheryl B. Fambles, CEO

Date: February 8, 2019

Subject: New PacMtn Policies:
Opioid Use Reduction & Recovery (OURR) Policy Development
PacMtn WorkSource Representation and Customer Referral Policy Development

Program Policy: Opioid Use Reduction & Recovery (OURR) Policy Development

The attached PacMtn Program Policies – Development, Change and Updates Summary reflects the development of a policy for the Opioid Use Reduction & Recovery (OURR) Alliance program, a new program funded through the National Health Emergency Dislocated Worker Demonstration Grants to Address the Opioid Crisis. A policy was needed at the local level for guidance on eligibility screening for participants, documentation of participant data in online tracking systems, and to provide references for additional guidance regarding the OURR Alliance program.

Development

Initial guidance for the National Health Emergency Dislocated Worker Demonstration Grant was provided in the Training and Employment Guidance Letter (TEGL) 12-17 along with additional guidance provided by the Department of Labor, Employment Security Department, and from within existing local policies as applicable to this grant award. With new definitions and expanded criteria, PacMtn determined a local policy was necessary to provide our area workforce professionals with the guidance needed for serving participants under the grant.

A series of determinations were processed at the local level ensuring adherence to existing WIOA regulations and guidance, including identifying criteria for new program participant eligibility definitions and allowances, Craig Clark and Julie Baxter led the effort to develop the OURR Alliance Policy deemed necessary to effectively serve program participants while adhering to the requirements of the NHE grant.

Upon development, the policy guidance was reviewed by the PacMtn Executive Leadership Team. Additionally, the Employment Security Department had a two-week period for review of local eligibility criteria to provide feedback on areas where changes may have been beneficial. Upon review by the Executive Finance Committee and in the event of approval, the policy will be disseminated to our area workforce professionals to include PacMtn staff, contractors, and partners providing services under the OURR Alliance grant.

PacMtn WorkSource Policy: Representation and Customer Referral Policy

The attached PacMtn Policy clarifies the expectations of the PacMtn Workforce Development Council (WDC) for required partners to be represented at WorkSource /American Job Center Sites and provide access to their services under the Workforce Innovations and Opportunity Act (WIOA).



TITLE: Opioid Use Reduction and Recovery (OURR) Eligibility Policy # 8000

Type: Program Policy

Date Established: 10/15/2018

Date Last Revised:

Date Posted to Website: 10/19/2018

Status: Draft

Supersedes: N/A

Purpose

The Opioid epidemic exacerbates the already stressed healthcare system and regional economy of the 5-county workforce area (PacMtn WDA). This project is designed to connect the community healthcare and workforce development systems. It will help Dislocated Workers and those affected by opioid addiction remove barriers to employment, become work ready and enter the world of work as contributors to the local economy and our communities

PacMtn's Opioid Use Reduction and Recovery (OURR) program will provide services aligned with and designed to support the goals of the region's economic development strategy, as well as the applicable WIOA Strategic Plan(s) for the PacMtn area.

Policy

This policy is in direct response to PacMtn receiving the Department of Labor's National Health Emergency Dislocated Worker Demonstration Grants to Address the Opioid Crisis. As part of the grant application process the entire five county PacMtn region was designated as hard-hit by the opioid crisis, supporting the need for additional guidance around serving expanded populations impacted by the opioid crisis.

This policy applies to all activities funded by and delivered through the local WorkSource system and applicable service providers. This policy provides guidance regarding the eligibility determination and enrollment of qualifying individuals affected directly or indirectly by the Opioid crisis, or workers seeking to enter into professions that could help in addressing the Opioid Crisis and its causes. With nation and region-wide community efforts underway to address the opioid crisis, providing additional guidance for our area workforce professionals to align with those efforts as part of this grant was identified as a necessity.

PacMtn and other workforce professionals will provide workforce based services in collaboration with and embedded in the community agencies that serve high-risk opioid affected populations including homeless youth and adults, youth under the care of state juvenile rehabilitation facilities, organizations supporting those in and out of county jails, mothers addicted while pregnant, and community mental health based organizations.

Policy Guidelines

Qualified workforce professionals will offer career guidance, job readiness assessments and placement support for individuals who are ready to be placed in a structured skill development program, and/or supervised work-experience (WEX), job shadow, internship or an unsubsidized job placement.

Trained workforce staff will be responsible for ensuring eligibility and documentation in accordance with the requirements set by US Department of Labor and covered in the OURR Procedures Document # 8000P.

Qualifying participants:

May be co-enrolled into WIOA formula grants if determined eligible, but it is not required
Participant must be a dislocated worker, incumbent worker, or new entrant to the workforce

New Entrant to the Workforce;

- An individual (age 16 and up) just entering the workforce for the first time
OR
- An individual (age 16 and up) who has been disconnected* from the workforce for long enough that it's as if they are starting over, including**:
- Individuals who have experienced unemployment for longer than twenty-seven (27) weeks
OR
- Individuals who have been disconnected* from the workforce by incarceration and/or conviction
OR
- Individuals who have been disconnected* from the workforce for at least thirty (30) days due to institutionalization into an inpatient treatment facility or outpatient treatment regimen
OR
- Individuals who have been disconnected* from the workforce due to new or exacerbated disability or substance use disorder which caused disconnection due to the individuals inability to perform the essential functions of their previous employment and/or has impacted their ability to establish new employment

**Disconnected is defined as any separation that has not allowed or will not allow an individual to return to their previous place of employment or previous line of work*

***Justifications for these definitions include consideration that these individuals are re-entering the workforce with new barriers that may prevent them from returning to existing employment and/ or are re-entering after a health related scenario*

- Please refer to WIOA guidance for definitions of Dislocated Worker and Incumbent Worker

Along with career, training, and work-based services allowed, other specific services and strategy guidance may be available but must be determined by the local WDC. Up to 10% of funding can be used for supportive services.

Example of supportive services that may be allowed:

- Health, mental health, addiction, or other forms of outpatient treatment that may impact opioid addiction and related, underlying, or complicating conditions;

- Drug testing for current use of illegal drugs prior to enrollment in career or training services or prior to employment;
- Linkages to community services, including services offered by partner organizations designed to support grant participants;
- Referrals to health care, including referrals to drug treatment and mental health services; and,
- Payments and fees for employment and training-related applications, tests, and certifications.

Please note: NHE grant funds may not be used to pay the costs of in-patient drug treatment and rehabilitation programs.

WIT System Data Entry Requirements (*WorkSource Integrated Technology System*)

As may be applicable and required for any WIOA and or Wagner-Peyser applicant or participant Career, Training or Follow-Up Service Data Entries to include but not be limited to the following:

- Applicant or Participant Registrations,
- Program Enrollments,
- Eligibility Determinations
- (Adult, DW, as applicable, Low Income, Military Service, Veteran, Priority of Service, etc.)
- The IEP's
- ITA's and Training Program Enrollments/Service Delivery
- Training paid by others
- Training/Program Completions
- Support Services,
- Exits
- Follow-Up Services,
- Case Note Entries;

and all other data requirements as necessary per Policy 1020 - Data Integrity and Performance Reporting Requirements and Handbook, please follow all current and future Workforce Integrated Technology (WIT), System guidance, training, instructional materials and direct departmental or program supervisor instruction and policies developed.

If the applicant or participant's information is already entered in the WIT System, staff must verify that the information is current and/or make updates. If required by program, print out the applicable or necessary document, obtain signatures and place in the hard copy file. Please note all system data updates or changes in case note.

To deliver Career and or Training Services, the program staff person is required to enter participant and program specific data that will create an Individual Employment Plan/Service Plan.

Data Validation Note: As may be applicable, the date of dislocation entered must be documented in the file by either verification from the employer; a Rapid Response list; Notice of Layoff; public announcement with a cross-match with UI; self-attestation and for transitioning military members by the Army Career Alumni Program (ACAP) application along with a self-certification from the applicant.

Applicants who identify them self as a veteran must have a copy of their DD214 in their participant file. The dislocation date must have the month, day and year.

Any discrepancies arising between PacMtn policy and or procedures with federal and state provisions due to current or future revisions will default to the current minimum federal and state regulations and guidance available. PacMtn policy and or procedures may set forth stricter requirements than provided by federal and state guidance, but in no case will PacMtn policy and or procedures not meet minimum federal and state policy.

References

Workforce Innovation and Opportunity Act of 2014
PacMtn Procedures Document # 5005P - Career Services
PacMtn Policy #5015 - Training Services
PacMtn Policy #5300 - Incumbent Worker Training
PacMtn Policy #5200 - Support Services
Training and Employment Guidance Letter (TEGL) 12-17
WorkSource System Policy 1019 R4* & Attachment A - Eligibility Handbook

**Compliance with the state's eligibility policy will be based on the version of the handbook in effect at the time of the action or activity that may be at issue.*

DATE APPROVED: TBD

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COMMUNITY OUTREACH FUNDING PROPOSAL



Date of Application 02 / 01 / 19

APPLICATION COVER SHEET

PROJECT INFORMATION

Project Name: Youth Entrepreneurship
Camp

Project Date(s): July 16-19, 2019 Project Location: Olympic College
Shelton

Amount Requested: \$2500 Date Funds Needed by: July 8, 2019

Legal Name of Organization Using Proposed Funds: Olympic College Foundation (YEC
Account)

CONTACT INFORMATION

Sponsoring PacMtn Board Member Making This Request: _____

Contact Person for this Project: Kandace MacKaben Title: Professor of
Management

Mailing Address: C/O Olympic College, 1600 Chester Avenue, Bremerton, WA
98337

Email Address: kmackaben@olympic.edu Telephone: 360-475-
7196

Application Instructions

Please complete the Application Cover Sheet and attached questions. Send completed application to contracts@pamtn.org. Applications are funded on a first come, first served basis within the applicable program year. To accommodate more projects, maximum award will not exceed \$2,500. Projects may be partially funded to allow a wider distribution of funds. Please submit applications at least one month prior to project. Applications will be reviewed and approved by the Executive Finance Committee monthly.

Proposal Guidelines

- All funding must follow, enhance, or promote the PacMtn Mission – *To lead dynamic regional workforce development that enhances economic success; and benefit or align with the needs or outcomes of our programs.*
- Proposals must adhere to allowable cost guidance per state and federal regulations

- Funds are not: direct service funds for clients; funds to benefit individual Board Members who want to participate in training or conferences *unless* they are specifically presenting and can uniquely represent PacMtn programs on high profile activities; or included within other PacMtn budget commitments.

Approved Proposals

Invoices for approved projects must be submitted to PacMtn at least 2 weeks in advance of date needed by. Please reference on invoice "Community Outreach Project" followed by project name. Send invoices to Fiscal@pacmtn.org.

A final summary must be provided detailing what happened and reporting measurable or noteworthy outcomes within 30 days of event completion.

APPLICATION QUESTIONS

1. Why and how does this project benefit the "brand", mission, programming, and priorities of PacMtn?

The Youth Entrepreneurship Camp (YEC) targets youth, ages 14-19, who represent the underserved, underrepresented population in Mason County which is the target group of PacMtn. The youth are exposed to entrepreneurial opportunities and emphasis is placed on developing skills necessary to be an entrepreneur and/or intrapreneur. These students develop mini business plans for small businesses that are realistic options for the local community. It serves as a bridging activity with a desired outcome of increasing student readiness for careers and college which is important to giving these students options for economic success which is part of the mission of the organization.

The students who have attended the camp during the past five summers are participants in the HOPE garden project which serves students from Choice High School. HOPE is an alternative educational summer program. They teach agri-business and skill development in leadership, team work and other soft skills which are further developed and reinforced during the week at YEC. Many of these students face workforce challenges due to limited technical and "soft" skills needed to be successful. They have limited exposure to business concepts where classes do not exist as electives at their high school except in the CAP21 program. Both summer experiences "provide exposure to the world of work through career exploration" which is a compliment to the project goals noted by PacMtn.

Another aspect to the camp that aligns with the project objectives of the organization is to encourage school completion and we hope that providing the youth with an experience on a college campus that they can see themselves as a college student on that campus. Since inception, every year, 1-2 of the participants enroll at Olympic College Shelton for one or more quarters. Some are there earning their GED, others are enrolled in college coursework. It can be difficult to determine if it was the underlying reason for their attendance, but we would assume that it has some impact on their decision making.

This year, we are planning on shifting the focus to social entrepreneurship. The students will identify social problems and then develop a plan for an entrepreneurial venture that will provide a solution that positively impacts the concern identified. This shift in teaching pedagogy aligns with one of PacMtn's value statements of promoting "innovation and creativity as the backbone of progress".

2. How will the PacMtn brand/logo be displayed or represented in this Community Outreach effort?

On the last day of camp, approximately 15 owners/employees from the local business community are asked to participate as mentors for the students. They provide feedback to the students on the presentations they complete that summarize their business ideas. PacMtn is acknowledged as a sponsor for the event during introductions and it is noted in a powerpoint presentation that is shown during the event that highlights pictures and events during the week.

3. How would the funds be used? Please be specific.

Supplies-\$250

Olympic College Business Management student mentors (2) are hired to assist with the program-\$450 each for total of \$900

Lunches/Snacks-\$350

Faculty compensation-\$1000

4. Do the funds align with and support one or more of the six industry clusters? If so, explain.

IT/Telecom Tourism & Recreation Food Production Life Sciences
 Chemical Products & Plastics Manufacturing Wood Products & Paper Manufacturing

Response to Question #4. Do the funds align with and support one or more of the six industry clusters? If so, explain.

The youth involved in the camp develop a business idea for a “pop up” business each year and invariably at least one team develops a plan for a business in the Hospitality & Tourism industry. During the camp, the importance of this industry to our communities and the opportunities it presents is discussed. After completing some research, they begin to realize the growth potential for entrepreneurs in the mobile food vending business sector. It is reinforced by HOPE personnel as they discuss trends in the industry such as the concept of “food to table”. Helping students understand the importance of developing ideas that are realistic entrepreneurial ventures in the community of Shelton is emphasized. Therefore, businesses in the food services industry becomes a natural choice as a career pathway for them once we discuss the importance of identifying their skills, passions and then the market needs of the community.



MEMORANDUM

TO: PacMtn Executive & Finance Committee

FROM: Corinne Daffern, Associate Director of Workforce Services

SUBJECT: PacMtn WorkSource Site Certification—Recommendation from Review Committee

DATE: February 1, 2019

The process for certifying the American Job Centers, Affiliates and Connection Sites in the PacMtn Region's WorkSource System must be completed by June 30, 2019. To date, the One-Stop Committee has reviewed and provided input into the criteria for site certification and definition of what it means for services to be available on-site. These materials form the foundation for the certification process. This memo describes the certification process and the roles and responsibilities of the certification team.

Site Certification Process Components

- **Certification Team** – The 4 to 8-member team will consist of 1) individuals who are familiar with WorkSource, but not directly responsible for the provision of WorkSource Services, 2) the WorkSource System Manager and 3) the PacMtn Associate Director for Workforce Services. The team will be facilitated by ABSLLC. The team is responsible for:
 - Determining how responses to the certification criteria will be scored,
 - Reviewing center, affiliate and connection site responses to the certification criteria,
 - Determining whether the responses adequately meet the criteria, or whether additional information will be needed,
 - Conducting center and affiliate site visits in order to gather any additional information and/or provide feedback,
 - Determining whether any connection sites should receive site visits,
 - Making a final recommendation regarding certification of sites in the PacMtn WorkSource System.
- **Certification Criteria** – The Center and Affiliate criteria are the basis on which the certification team will decide whether to recommend that the centers and affiliates be certified. A separate process less comprehensive process is being developed for the Connection Sites.
- **Scoring Guide** – The tool used by the certification team to rate the responses of the sites to the certification criteria.



Development

WIOA specifies that at least one WIOA title I staff must be physically present at a comprehensive AJC. WIOA requires title III Wagner-Peyser Act to be “co-located in comprehensive and/or affiliate American Job Centers” and requires staff from at least one additional partner be physically present more than 50% of the time the site is open. Local veterans’ employment, disabled veterans’ outreach, or unemployment compensation programs do not count as the partner for purposes of this requirement.

TEGL 16-16 clarifies that “providing career services does not mean that each required partner must provide these services directly on-site at a comprehensive American Job Center”. It does specify that career services must be provided directly on-site through access to one-stop partner programs and activities, which, as described in 20 CFR 678.305(d), 34 CFR 361.305(d), and 34 CFR 463.305(d), may be delivered in three ways:

- Having program staff physically present at the American Job Center;
- Having staff from a different physically present partner *appropriately trained* to provide information to customers about the programs, services, and activities available through all partner programs; or
- Providing direct linkage through technology to a program staff member who can provide meaningful information or services.

Each WDC, with the required partners and one-stop operator(s), is required to establish how access to partner programs will be provided and to document this in the local Memoranda of Understanding (MOUs). The frequency of program staff’s physical presence in an affiliated site is to be determined through local MOU negotiations.

Ideally, customers should be able to access all the services they need in “one-stop” – without travelling for appointments, etc. While the obvious way to achieve this level of access is for staff from all required partners to provide services on-site, this is be unrealistic, expensive and potentially duplicative. This policy clarifies the expectations for required and other partners to participate in WorkSource/American Job Centers, Affiliates, and Connection Sites in the PacMtn Region. It is the policy of the WDC to provide the maximum access to services to current and potential customers of the WorkSource/AJC system in the PacMtn Region. The expectations set forth in this policy represent a floor (base level expectations) not a ceiling (ideal state). WorkSource/AJC sites and required and other partners are expected to meet the expectations set forth in this policy and to work to exceed them in order to assure maximum access to services for all customers.

Motion to Approve

Motion to approve the two new PacMtn policies developed and in accordance to federal policies and guidance.

Attachments: PacMtn Program Policies – Development, Change and Updates Summary
OURR Eligibility Policy #8000
WorkSource Policy: On-Site Representation and Customer Referral



- **Site certification kick-off** – A video conference was held on 1/30/19 @ 8:00 a.m. to orient all staff to the new certification process, clarify expectations for the participating in the process and discuss how the results of the process will be used.

Certification Process and Timeline

Date	Activity
1/17/19	Supervisors/leads meet to discuss certification process – application, timelines, scoring, talking points, staff engagement.
1/30/19	Kick-off video conference. Final memo, application guide and FAQs
1/31/19 – 4/19/19	Sites complete certification application (11 weeks)
2/1/19 – 2/8/19	Supervisors convene offices 2x to solicit questions/pain pts, forward these to WSM.
2/7/19	Update to WDC One-stop Committee
2/11/19	Manager team meets with offices to provide TA
3/7/19	Update to WDC One-stop Committee
4/4/19	Update to WDC One-stop Committee
4/19/19	Certification Application due to ABSLLC @ 5:00 p.m
4/22/19	Applications forwarded to Certification Team
4/22/19 – 4/25/19	Certification Team individually review and score applications
4/26/19 from 1-5	Certification Team meets to score applications, determine what additional info is needed from sites
4/29/19	Results of Certification Team meeting shared with sites.
4/30/19 -5/17/19	Sites respond to questions, prepare for visits.



	Site visits scheduled.
5/2/19	Update to WDC One-stop Committee
5/10/19	Update to WDC ELT (Executive Leadership Team)
5/17/19	Site responses Certification Team question due to ABSLLC
5/20/19	Certification Team meeting to prep for Site Visits
5/29/19 – 5/31/19	Site visits (NOTE: Memorial Day is 5/27) – Shelton, Grays Harbor, Lewis, Thurston
6/3/19	Certification Team meets to finalize recommendations
6/4/19	Certification Team recommendations to WDC One-stop Committee
6/6/19	WDC One-stop Committee recommendation to WDC ELT
6/14/19	WDC ELT recommendation forwarded to WDC Board
6/27/19	WDC Board approval



Annual Board Retreat
January 24, 2019
8:00 AM – 4:00 PM | Grays Harbor College

Agenda

8:00 Continental Breakfast & Networking

8:30 Welcome & Self Introductions

Share your most memorable moment or reflection of your service on the WDC Board?

(Board Chair Duane Evans)

Welcome to Grays Harbor Campus (President Jim Minkler)

9:00 2018 In-Review (PacMtn Senior Staff)

10:30 BREAK

10:45 Youth Voices: I Want You To Know...

12:15 LUNCH

12:30 Integrated Service Delivery: Opportunities to Partner (Eleni Papadakis)

12:50 Making the Partnership Work for Customers: Board Member Panel Discussion

(Jim Minkler, Jason Reed, Paul Vertrees, Anne Goranson, Dawn Murphy, Mike Hickman)

2:30 BREAK

2:45 The Board's Role: Small Group Discussion (All)

Some research suggests that at least 40% of this region's workforce pipeline—young people and those remaining on the labor force sidelines are not finding their way to a successful life pathway. For this region, what ideas does the Board have and will assume some leadership to impact those circumstances?

3:50 Reflection of the Day and Concluding Remarks (All)

January 2019 Board Retreat
Afternoon Small Group Discussion

Research suggests at least 40% of this region's workforce pipeline – young people and those remaining on the labor force sidelines are not finding their way to a successful life pathway.

What ideas does the Board have and will assume some leadership to impact those circumstances?

1. What are the major obstacles getting in the way of more individuals finding a pathway?
2. What 1 or 2 priorities in programming and specific investments could the Board make that would make a difference.
3. What would demonstrate that the Board's commitment was making a difference?

What are the major obstacles getting in the way of more individuals finding a successful life and employment pathway?

1. K-12 system inadequate
 - Teach only what we test
 - Educational alignment with needs of workforce
 - Career connected learning – No incentives
 - Public schools focus on negatives
 - K-12 lack exposure to workforce,
 - early exposure to what is possible, lack of methods for earlier intervention
2. Limited Options and College Bias
 - College only value
 - Misleading image of success – “college or bust”
3. Specific Population Challenges
 - Decision makers lack understanding of next generation
 - Entitlement
 - Youth awareness of the possibilities outside their immediate bubble
 - Cultural differences
 - Participation in work to make a difference
 - One size programming and services do NOT fit all
 - Size of region limits and complicates access to services
 - Structural Inequity for certain populations
 - Lack of trust- of the system
 - Disabilities
4. Limited role for business in defining what it means to be a successful employee

What 1 or 2 Priorities and Actions in programming and specific investment could the Board make that would make a difference?

Work with K-12

1. Remodel education system to align with stackable certs and beyond
2. K-12 accountability needs to be more flexible
3. Build career exposures for k-12
4. Teach students entrepreneurship
5. "Ropes" course in schools and libraries to promote resiliency and build understanding of risks and failures
6. Deeper connection to WFO
7. Early opportunities for Career Exploration and Early Experience on job sites Map out pathways- stackable certificates

Market Services

1. Marketing campaign so people understand resources available
2. Use of technology to grab attention of younger participants

Focus upon and Build Skills Needed by Business

1. Common skills across sectors
2. Build buy in for certifications that meet needs of biz
3. Cross walk skills to jobs
4. Expand Employer connections
5. Work with Impact Washington to reach businesses
6. Manufacturing or similar Simulation technology

Impact Workforce System

1. THINK BIG--System overhaul
2. Increase connection between referrals and jobs
3. Survey the user and ask 'what can we do'
4. Replicating WIOA service provider panel activity w/ WorkSource partners
5. System Navigator
6. Increase Apprenticeship, Internship
7. Help build externship Programs

Misc

1. Great emphasis on birth through 5 early learning
2. Review Switzerland apprenticeship model
3. Future proofing systems and people
4. Learn and experience risks/failure to build resiliency
5. Parent learning and involvement "whole family unit"

Question 3

What would demonstrate that the Board's commitment was making a difference?

1. Collectively talk it through and plan
2. More localized data
3. Objective surveys
4. Be in the community talking about it i.e. go to events like fishery release into Chehalis
5. Dedicated time and financial Investment towards improved outcomes
6. Sponsor Local Events like Math4Life, Bring Your Child To Work



STAFF MEMORANDUM

To: PacMtn EFC Members
From: Cheryl B. Fambles
Date: March 6, 2019

Subject: Discussion Only: Review of 2019 Board Planning Retreat and Next Steps

Background

Board Member comments overall were very favorable. Most found it informative and a good use of time. The organization of the materials and the day were well received. Board Members were appreciative in hearing the youth present their stories and to see how their participation in WIOA programs led to jobs.

Grays Harbor College was a great host. We did receive statement about the inability to hear and moving forward the staff will take a stronger look at acoustics, including use of microphones and setting up the room in ways that better facilitate hearing those with softer voices. The afternoon break was not soon enough and that meant the afternoon treats also were delayed. The Board requested a Proclamation for Stacey Anderson's retirement and it was delivered in a party before she left for Florida.

In the afternoon section of the Retreat, Eleni Papadakis from the State Workforce Board provided an overview of workforce board responsibilities included in the federal law and re-emphasized in the State Talent and Prosperity Plan. Eleni then facilitated a panel wherein Board Members who represent each of the major partnerships in a WorkSource described what it is their agency/field/partner service offers and how such offerings are realized and maximized. They also described the challenges that limit the ability to truly leverage those possibilities. The panelists focused their comments on 3 different customer profiles that represent a composite of the circumstances, profile and characteristics of real customers in our region. These customers are youth or adults with the highest service priority (homeless, justice involved, with disability).

After the BREAK and in consideration of the issues raised by the Panelists Board Members went to smaller work groups to identify specific actions or outcomes the entire Board could assume to close the gap on the large percent (40%) of the region's population that do not graduate, get on a career path, and find work that is fulfilling, advancing or self-sufficient/sustaining.

The Board was asked 3 questions to impact those circumstances. A summary of the feedback is attached.

1. What are the major obstacles getting in the way of more individuals finding a pathway?
2. What 1 or 2 priorities in programming and specific investments could the Board make that would make a difference.
3. What would demonstrate that the Board's commitment was making a difference?



Summary of Comments and Major Themes

Challenges and Obstacles:

1. K-12 system lacks a connection to real world jobs and careers
2. Students are afforded limited choices in careers and jobs
3. Bias toward college
4. Specific populations are more challenged/impacted than others
5. Business needs a stronger influence

Opportunities, Priorities and Possible Action:

1. Despite funding limitations for In-School Youth, find ways to influence the younger student's experience of the world of work
2. Market and value the possibilities of many jobs and career pathways
3. Tie skills and abilities to contemporary work place demands
4. Focus on the value of *skills and skills acquisition* vs. jobs
5. Improve the functionality of and access to the workforce system
6. Youth entrepreneurship and innovation skills

Board Demonstration of the commitment

1. Show up at career connected events and activities funded by PacMtn
2. Invest in youth employment
3. Get the necessary data and tell the story
4. Enable more young people to access information at an earlier age

Staff Recommendations for Next Steps

Based upon these themes and in light of the ongoing work, we offer the following thoughts, activities and projects to undertake in the remainder of this and next year:

- emphasize and incentivize work-based learning projects in partnership with local businesses i.e. High Impact Community Grants
- increase alignment and integration with Career Connected Learning programs and funds
- Convene regional "CTE in the community" discussion in partnership with districts and RALLY to assess needs and vet **possible** activity including:
 - a marketing campaign
 - teacher training and support for CTE related competitions
 - provision of career pathway information for CTE teachers and counselors
 - offer technical support workshops and resources for smaller communities
- Invest in Youth Entrepreneur programming