

## **PacMtn Workforce Development Council**

Board Meeting Agenda

Thursday, June 27, 2019 ▪ 1:30 - 4:00 pm

Party for Bridget 4:00-6:00pm

Location ▪ South Puget Sound Community College, Lacey  
Campus, Room 188

Zoom: **888- 475- 4499** \* <https://zoom.us/j/940572423>

Meeting ID: **940 572 423**



### **I. Welcome & Leadership Reports (Jacquelin Earley)**

**A.** Welcome and Self Introductions

**B.** Establish Quorum & Review Today's Agenda

**C.** Board Chair Report

- **Action Item:** Motion to Approve New Board Chair, Jacquelin Earley

**D.** CEO Report

**E.** Outgoing Board Member Appreciation

### **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 March 2019 Meeting
- WIOA Policy Modifications Recommended for Approval from Executive Finance Committee
- Quarterly Financials (Quarter Ending March 31, 2019)
- Check Signer (Add Jacquelin, remove Duane from main checking account)

### **III. Action Items & Strategic Discussions**

**A.** Motion to Approve: PY19 Preliminary Final Budget as Recommended at the June 14, 2019 Executive Finance Committee Meeting

**B.** Review: WorkSource One-Stop Certification as Approved by One-Stop and Executive Finance Committees

### **IV. 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)

### **V. Good of the Order & Announcements**

**Celebration of Bridget Lockling, Former Director of Finance & Administration**

## Upcoming Meetings

Date	Location
<b>September 26</b>	Centralia College, Tour New WorkSource
<b>November 14</b> PY19 Final Budget Approval	TBD
<b>December 13</b> Year End Celebration	TBD

## 2019-2020 WDC Members

Name	Business/Organization	Representation
1. Duane Evans	Port Blakely U.S. Forestry	Business: Wood Products Manufacturing
2. Jonathan Pleger	Morningside	CBO/Serves Disabled Populations
3. Alissa Shay	Port of Grays Harbor	Business: Logistics Cross Sector
4. Dru Garson	Greater Grays Harbor	Business: Economic Development
5. Derek Epps	Seattle Shellfish	Business: Aquaculture/Food Production
6. Jacquelin Earley	Sierra Pacific	Business: Wood Products Manufacturing
7. Steve Rogers	Pacific County Historical Society & Museum	Business: Tourism & Recreation
8. Jim Sayce	Pacific County EDC	Business: Economic Development
9. Michael Cade	Thurston County EDC	Business: Economic Development
10. David Schaffert	Thurston County Chamber	Business: Private Sector Enterprise
11. Scott Haas - Nominee	Employment Security Dept.	Wagner-Peyser Employment Service
12. Sherry Barry - Nominee	Twin Harbors Labor Council	Labor Organization
13. Cheryl Heywood	Timberland Regional Library	CBO/Serves All Populations
14. Dr. Jim Minkler	Grays Harbor College	Post-Secondary Higher Education
15. Dr. Dana Anderson - Nominee	Educational School District #113	K-12 Education
16. Bob Guenther	Thurston, Lewis, Mason Counties Labor Council	Organized Labor
17. Paul Vertrees	DSHS/DVR	Vocational Rehab
18. Jason Reed	DSHS/Community Services	TANF-DSHS
19. Kelli Bloomstrom - Nominee	Centralia College	ABE: Regional
20. Grant Lehman - Nominee	Jack's Country Store	Business: Private Sector Enterprise
<b>21. Vacant</b>	<b>Thurston County</b>	<b>Business:</b>
22. Bill Sullivan	Education Technology Solutions Consultant	Business: Private Business
23. Peter Lahmann	Port of Centralia Port Commissioner	Business: Economic Development
24. Diana Murphy	Intermountain Staffing	Business: Staffing
25. Jennifer Baria	Mason County EDC	Business: Economic Development
26. Christina Riley	Construction Marketing Rep	Labor-Apprenticeship

### Workforce Development Speak (Commonly Used Acronyms)

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

## **WDC Board Meeting Minutes**

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

Olympic College ▪ Shelton Campus

Online and by Phone



**Board Member Attendees:** Dru Garson, Diana Murphy, Bill Sullivan, Peter Lahmann, Jacquelin Earley, Jim Sayce, Michael Cade, David Schaffert, Jonathan Pleger, Cheryl Heywood, Dr. Jim Minkler, Bob Guenther

**Staff:** Cheryl Fambles, Bridget Lockling, Corinne Daffern, Jage Curl, Sean Murphy, Kelly Cobb

**Excused:** Alissa Shay, Duane Evans, Jennifer Baria, Bob Hitt, Steve Rogers, Christina Riley, Kairie Pierce, Mike Hickman, Jason Reed, Paul Vertrees

### **I. Welcome & Leadership Reports**

**A.** The meeting was called to order at 1:34 pm and quorum was not established. Dr. Jim Minkler agreed to chair the meeting in the absence of Duane Evans.

**B.** Board Chair Report – Dr. Minkler described the nature of Duane’s new position and that it has become more international. Duane will not be stepping away from the Board but has decided to pass the gavel as Board Chair. Because the bylaws do not allow a public sector position to be Chair, Jacquelin Earley has agreed to chair the next meeting

**B.** CEO Report – Cheryl gave her CEO Report which can be found on our website, pacmtn.org. Sean and Diana gave an overview of the NAWB conference in Washington DC.

**Michael Cade arrived at 2:10 pm to establish quorum. Dr. Minkler moved to the Consent Agenda.**

### **II. Action : Consent Agenda**

**A.** Approval of:

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

*Dr. Minkler motioned to approve Consent Agenda. Motion seconded. **Motion carries.***

### **III. Strategic Discussions**

- A.** Follow-up from January Board Retreat – Notes from the retreat can be found on the website. The Board discussed an integrated approach to services and how best to utilize partnerships. There was also discussion around K-12 partnership work and engaging kids by working with school counselors’ offices and involving students and their parents in the discussion. It was noted that integrated systems have vastly improved over the last few years.

### **IV. Committee & Task Force Updates**

- A.** Executive Finance Committee – It was noted that the Budget Workshop will be held on May 10<sup>th</sup>
- B.** One-Stop Committee – PacMtn is on the scheduled timeline for full certification.
- C.** Business and Sector Engagement (BaSE) – the update can be found in the CEO Report
- D.** Adult Basic Education & Literacy (ABEL) – Dawn Murphy has resigned her position on the Board, which means there is a vacancy. There has been discussion about who will fill the seat and that nominee would be the ABEL Task Force Lead.

### **IV. Board Learning Feature Topics**

- A.** Two short videos were shown to the Board from Skills USA and WorkSource.

### **VI. Good of the Order & Announcements:**

- Cheryl Heywood gave several announcements regarding Timberland Regional Library.
- Jim Sayce announced that Impact WA is setting up Lean Training with rural hospital districts.
- Dru Garson said that a delegation of high-level consultants from the US Department of Labor will be dispatched to focus on rural areas and their workforce development needs.

Meeting adjourned at 3:52 pm

**Submitted by: Kelly Cobb, Senior Administrative Assistant**



## MEMORANDUM

To: PacMtn Board Members  
From: Cheryl B. Fambles, CEO  
Date: June 7, 2019  
Subject: WIOA Program Policy Changes

The attached WIOA Policy Change Summary reflects updates processed for numerous PacMtn Program Policies. The updates varied dependent upon the nature of the need.

Most of the changes were minor in nature but deemed necessary to maintain compliance with WIOA regulations. Overall, the majority of the WIOA Program Policies required simplistic reference/guidance updates with a few needing specific policy language and directive updates. Each of the policy language or directive changes are in detail within the supplemental WIOA Policy Change Document.

PacMtn ensures local polices are current and up to date so that staff, service providers and those we serve are well informed on the requirements of our work.

### **Changes**

While we suspect the system will continue to change as WIOA regulations are further scrutinized and critiqued which will most assuredly result in state guidance that will evolve shortly thereafter, we have developed the foundation of policy management that will quickly adapt with, respond to and thoroughly disseminate such changes.

All policy changes identified adhere to current federal and state policies and guidance.

### **Motion to Approve**

Recommend approval, as presented, of the 22 (13 Adult/DW & 9 Youth) local WIOA Program Policies.

**Attachment:** WIOA Policy Background and Change Summary

***All PacMtn WIOA Adult, DW and Youth Program Policies are accessible for viewing on the PacMtn website ([www.pacmtn.org](http://www.pacmtn.org)) and available upon request.***

## **WIOA Program Policy Update/Change 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. PacMtn must also ensure local policies are 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.

In follow up to recent changes with federal guidance and state policies, PacMtn staff has completed the process of updating local WIOA program policies (Adult, Dislocated Worker and Youth), to accurately refer to and align with those changes.

Many of the changes were insignificant requiring nothing more than simple updates to the identification of the external resources or specific guidance referenced. Some of the changes were more extensive requiring policy language or directive updates as noted below.

The following chart provides a brief summary of the policy updates completed.

***Current PacMtn Policies are available upon request and accessible for viewing at [pacmtn.org](http://pacmtn.org). The website will be updated following Board approval.***

## PacMtn - WIOA Program Policy - Updates

### ADULT & DISLOCATED WORKER

#### Specific Policy: WIOA Adult & Dislocated Worker Formula Programs Assessments Policy #5010

##### Change 1:

- **Updated the policy to include the language below to reflect the current Employment Security Department (ESD) Policy 1011, Rev. 4 CASAS for Basic Skills Deficiency**

In alignment with the State Policy, PacMtn has approved the CASAS tests as the only standard tools to determine Basic Skills Deficiency (BSD) used for program enrollment of:

- i. WIOA Out-of-School-Youth (OSY) who have a high school diploma or its equivalent, are low income and Basic Skills Deficient or an English Language Learner
- ii. WIOA In-School Youth (ISY) who are Basic Skills Deficient
- iii. WIOA Adult Priority of Service categories 1 & 2 (*priority must be implemented regardless of the amount of funds available to provide services in the local area*):
  1. Covered persons (veterans and eligible spouses) who are low income, recipients of public assistance, or basic skills deficient
  2. Individuals (non-covered persons) who are low-income, recipients of public assistance, or basic skills deficient

##### Change 2:

###### Assessments Permitted

- i. The following CASAS assessments may be used in Washington through June 30, 2019. The National Reporting System (NRS) determines tests suitable for use and the period for which that use is approved.
  1. Life and Work Reading (forms 81-188)
  2. Life and Work Listening (forms 981-986)
  3. Life Skills Math (forms 31-38)
- ii. These assessments meet the NRS requirements and:
  1. Are appropriate for measuring literacy and language development of adult students/job seekers,
  2. Have standardized administration and scoring procedures,
  3. Have alternate, equivalent forms for pre- and post-testing, and
  4. Have evidence linking them to the NRS Educational Functioning Levels.

#### Specific Policy: All WIOA Adult and Dislocated Worker Formula Program Policies (as applicable)

##### Change 1:

- **Removed the following language no longer applicable, or of benefit to local policy**

**NOTE:** The Eligibility Policy Handbook is based on the best information available at this time per WIOA law, proposed rules, and DOL/ETA guidance. The handbook will be revised and reissued after the WIOA final rules are issued and as relevant DOL/ETA guidance is received.

Effective January 8, 2016.

Additionally, all other data requirements previously entered into and managed in SKIES, as necessary per Policy 1020 - Data Integrity and Performance Reporting Requirements and Handbook, are still applicable for entry within the WIT System

##### Change 2:

- **Updated the paragraph below adding the following language** (*Follow-up, however, can only be provided after exit*).

There are three types of career services: basic, individualized, and follow-up. There is no sequence requirement for basic and individualized which can be provided in any order to provide flexibility in targeting services to the needs of the customer. Follow-up, however, can only be provided after exit.



## ADULT & DISLOCATED WORKER CONTINUED

### Specific Policy: All WIOA Adult and Dislocated Worker Formula Program Policies (as applicable)

#### Change 3:

- **Updated the paragraph below adding the following language** *(Not required for Displaced Homemakers)*

Data Validation Note: (Not required for Displaced Homemakers)

The date of dislocation entered must be documented in the file with:

- Verification from employer
- Rapid Response list
- Notice of Layoff
- Public announcement with UI cross-match
- Self-attestation for transitioning military by the Army Career Alumni Program (ACAP)
- Self-certification from military applicant

#### Change 4:

- **Removed the following language no longer applicable or of benefit to local policy**

Significant Staff Involvement

Enrollment into a WIOA funded program occurs at the point where there is significant staff involvement. Significant staff involvement includes staff's assessment of a participant's skills, education or career objectives to assist the participant in making a decision or accessing information, compared to staff providing a participant with readily available information that does not require an assessment.

#### Change 5:

- **Removed the following paragraph**

TEGL 22-04 says: A basic requirement to qualify as a dislocated worker is that the worker be terminated or laid-off.

- **Replaced it with the following**

TEGL 22-04 and Section (3)(15)(A)(i), state that a basic requirement to qualify as a dislocated worker is that the worker be terminated or laid-off, or received a notice of termination or layoff.

#### Change 6:

- **Removed the following paragraph**

Employed adults are eligible for career services and additionally eligible for training services if they are determined to be in need of such services to obtain or retain self-sufficient employment (WIOA Section 134(c)(3)(I)).

- **Replaced it with the following**

Employed eligible adults may receive career services and in addition may be eligible for training services if they are determined to be in need of such services to obtain or retain self-sufficient employment (WIOA Section 134(c)(3)(I))

#### Change 7:

- **Removed the following paragraph**

Basic career services are available to Adults or Dislocated Workers through the WorkSource delivery system after a determination has been made of whether the individuals are eligible to receive assistance.

- **Replaced it with the following**

Basic career services are available to individuals determined eligible for and enrolled in an Adult or Dislocated Worker program.

## Specific Policy: WIOA Adult & Dislocated Worker Formula Programs Incumbent Worker Policy #5300

### Change 1:

- **Removed the following paragraph**

Incumbent Worker

Incumbent Worker is a term reserved for individuals served with special set aside funding. Sometimes individuals who are employed but enrolled in a formula funded dislocated worker program are referred to as incumbent workers but it is important to understand the difference in funding and eligibility.

- **Replaced it with the following**

Incumbent Worker

An individual who is employed, meets the Fair Labor Standards Act requirements for an employer-employee relationship, and has an established employment history with the employer for 6 months or more.

Incumbent workers need not meet the WIOA Title I eligibility requirements for adults or dislocated workers to receive career and training services unless they are also co-enrolled as participants in the WIOA Title I Adult or Dislocated Worker programs.

## YOUTH

## Specific Policy: WIOA Youth Formula Program Policy # 7010

- **Updated the policy to include the language below to reflect the current Employment Security Department (ESD) Policy 1011, Rev. 4 CASAS for Basic Skills Deficiency**

### Change 1:

In alignment with the State Policy, PacMtn has approved the CASAS tests as the only standard tools to determine Basic Skills Deficiency (BSD) used for program enrollment of:

- WIOA Out-of-School-Youth (OSY) who have a high school diploma or its equivalent, are low income and Basic Skills Deficient or an English Language Learner
- WIOA In-School Youth (ISY) who are Basic Skills Deficient
- WIOA Adult Priority of Service categories 1 & 2 (*priority must be implemented regardless of the amount of funds available to provide services in the local area*):
  - Covered persons (veterans and eligible spouses) who are low income, recipients of public assistance, or basic skills deficient
  - Individuals (non-covered persons) who are low-income, recipients of public assistance, or basic skills deficient

### Change 2:

Assessments Permitted

- The following CASAS assessments may be used in Washington through June 30, 2019. The National Reporting System (NRS) determines tests suitable for use and the period for which that use is approved.
  - Life and Work Reading (forms 81-188)
  - Life and Work Listening (forms 981-986)
  - Life Skills Math (forms 31-38)
- These assessments meet the NRS requirements and:
  - Are appropriate for measuring literacy and language development of adult students/job seekers,
  - Have standardized administration and scoring procedures,
  - Have alternate, equivalent forms for pre- and post-testing, and
  - Have evidence linking them to the NRS Educational Functioning Levels.

## YOUTH CONTINUED

### Specific Policy: WIOA Youth Formula Program Policy # 7010

#### Change 3:

##### Appraisal Test

- i. The appraisal test must be given first (prior to the pre-test) to determine the appropriate level and form of the pre-test to be used.
- ii. The CASAS appraisal test cannot be used in lieu of the CASAS pre-test to determine BSD.

All test forms and assessment tools must comply with federal guidelines and standards and must be approved through PacMtn Youth Services staff. Staff must not upload into the case management system or retain in hard files any CASAS document(s) that contain test questions or other sensitive testing information. (See the CASAS test security policy at <https://www.casas.org/about-casas/privacy-and-copyright-policy>)

For further details on the usage and procedures for utilizing CASAS for determining and documenting Basic Skills Deficiency, all contractors of youth programs will follow PacMtn Procedures # 7010P - CASAS For Basic Skills Deficiency.

### Specific Policy: WIOA Youth Formula Program Policy # 7100

#### Change 1:

- **Updated the paragraph below adding the following language to clarify only OSY ages 16-24 are eligible (*out of school, ages 16-24*)**

Training services, when determined appropriate, must be provided through an Individual Training Account (ITA). ITA funds are available to purchase training services from eligible training providers for out-of-school Youth ages 16-24. Eligible training providers are selected by the participant through consultation with program staff and or employment counselors. Individuals are expected to utilize information that is provided (e.g., skills assessment, labor market conditions/trends and training vendor performance) to take an active role in managing their employment future through the use of ITAs.

## Pacific Mountain Workforce Development Council

### NOTES TO FINANCIAL STATEMENTS

Program Year July 1, 2018 through June 30, 2019

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#### ***For month ending March 31, 2019***

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 second quarter.
- b) The Incumbent Worker Training for childcare program was restructured but they were not able to spend out their contract budget.
- c) The new Incumbent Worker Training called Employee Development Program is underway and expenditures will show up in 4th quarter.
- d) Career Connect WA contracts are all underway but still behind projected spending. Anticipate being caught up by the end of the grant term in September.
- e) The final C2C expenses came in underspent, mostly due to training expenses being lower than anticipated due to enrollments in those programs. The efforts at JBLM will continue with reduced staffing using other funds.
- f) Business Services spending is on target. The contract for services at JBLM will be extended for the TC Chamber. The Tacoma Pierce Chamber did not overspend their contract, the budget amount reflected is less than actual available.
- g) Pierce County Career Days generated more revenue, thus more expenses, than budgeted, coming in earning \$31,025.
- h) High Impact Community Grants have all been awarded and activity starts in February and March.
- i) In the Administration budget the Temp support is over for the year due to fiscal temp needed to cover a staff absence. The Temp budget will be increased due to staffing changes during the budget mod.
- j) Licenses fees are over for the year due to the CHMURA payment. This is due to timing. Overall we are under budget.
- k) Bank Fees have not been charged by the bank since last May.
- l) Community Outreach funds are being utilized earlier in the year than in the past. Anticipate full utilization this year of funds.
- j) Overall administration budget is within 10% of projected expenses through three-quarters of the year.

- 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 \$1,142,158. Net assets have decreased by \$7,252 since last quarter due to losses 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 March 2019</i>	Current Year Actual	Current Year Budget	Variance	Total Budget	Balance Remaining	% Spent	Target %
<b>REVENUES</b>							
Grant & Contracts	7,542,115.65	9,027,925.85	1,485,810.20	15,023,097.56	7,480,981.91	50%	60%
Other	-	-	-	-	-	0%	0%
<b>Total Revenues</b>	<b>7,542,115.65</b>	<b>9,027,925.85</b>	<b>1,485,810.20</b>	<b>15,023,097.56</b>	<b>7,480,981.91</b>	<b>50%</b>	<b>60%</b>
<b>EXPENSES</b>							
<b>Program Services</b>							
Direct Participant Services	5,338,828.43	6,765,808.58	1,426,980.15	10,787,832.39	5,449,003.96	49%	63%
Business Services & Solutions	458,073.68	500,301.11	42,227.43	600,301.11	142,227.43	76%	83%
Special Impact Projects	128,719.26	167,502.46	38,783.20	279,192.61	150,473.35	46%	60%
Misc Contracts & Projects	10,342.90	43,750.00	33,407.10	95,000.00	84,657.10	11%	46%
Subtotal	5,935,964.27	7,477,362.15	1,541,397.88	11,762,326.11	5,826,361.84	50%	64%
<b>Administrative Services</b>							
Admin Office Operations	1,268,072.48	1,405,694.69	137,622.21	1,879,929.08	611,856.60	67%	75%
Transition Activities	36,955.90	51,119.02	14,163.12	68,158.69	31,202.79	54%	75%
One Stop Operator	72,405.02	93,750.00	21,344.98	125,000.00	52,594.98	58%	75%
	-	-	-	-	-	#DIV/0!	#DIV/0!
Subtotal	1,377,433.40	1,550,563.70	173,130.30	2,073,087.77	695,654.37	66%	75%
<b>TOTAL EXPENSES</b>	<b>7,313,397.67</b>	<b>9,027,925.85</b>	<b>1,714,528.18</b>	<b>13,835,413.88</b>	<b>6,522,016.21</b>	<b>53%</b>	<b>65%</b>
<b>Change in Net Assets</b>	<b>228,717.98</b>	<b>-</b>	<b>(228,717.98)</b>	<b>1,187,683.68</b>			

<i>Beginning Net Assets</i>	927,569
<i>Plus current Net Assets</i>	228,718
<i>Change in special funds</i>	<u>(14,130)</u>
<i>Ending Net Assets W/O Donor Restrictions</i>	<u>1,142,157</u>

Pacific Mountain Workforce Development Council

STATEMENT OF ACTIVITIES

Expense Detail

PY18 Budget to Actual Report

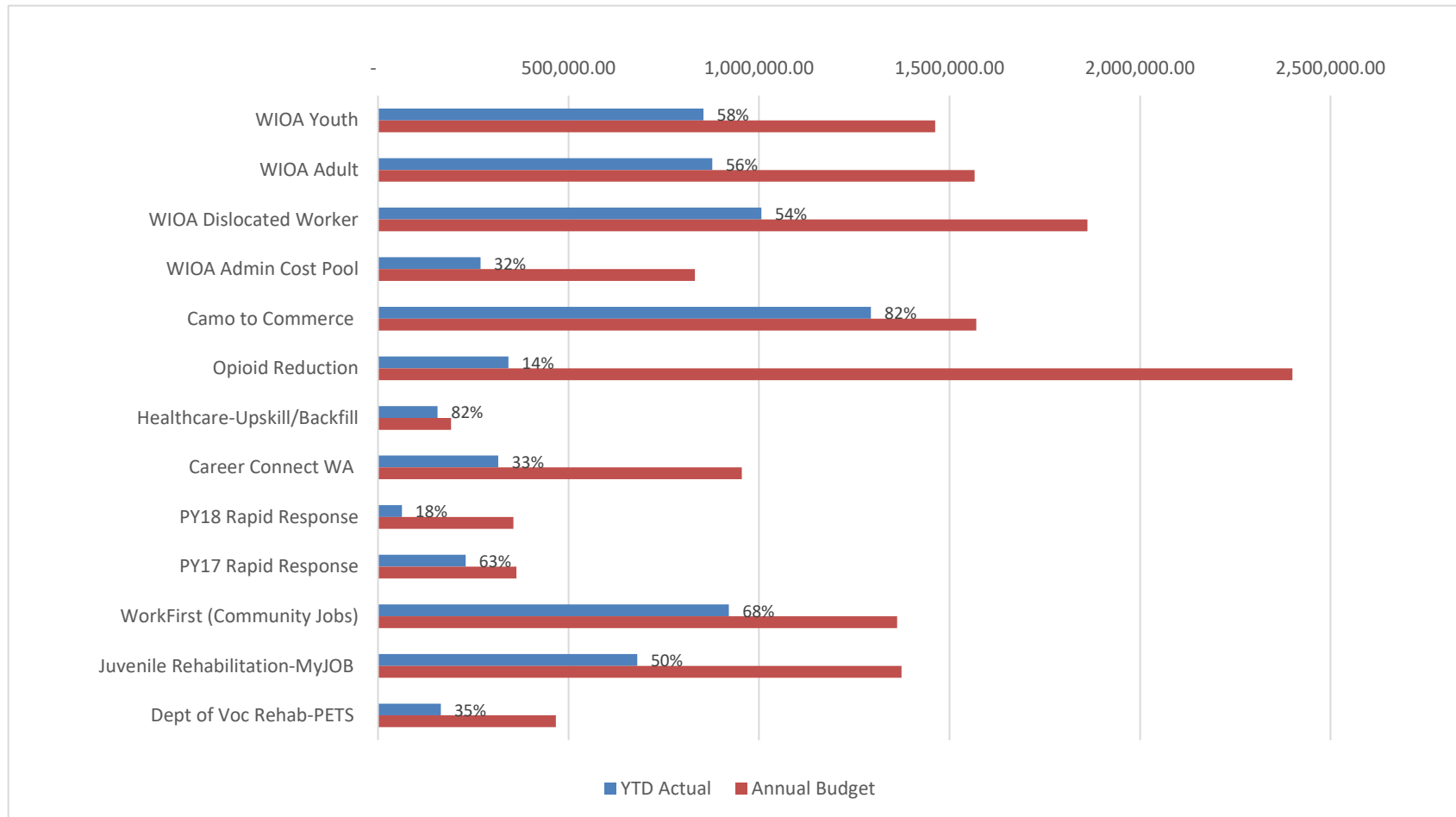
<i>For month end March 2019</i>	Current Period Actual	Current Period Budget	Variance	Current Year Actual	Current Year Budget	Variance	Total Budget	Balance Remaining	% Spent	Target %
<b>REVENUES</b>										
Grant & Contracts	807,086.33	1,067,214.77	260,128.44	7,542,115.65	9,027,925.85	1,485,810.20	15,023,097.56	7,480,981.91	50%	60%
Other	-	-	-	-	-	-	-	-	0%	0%
<b>Total Revenues</b>	<b>807,086.33</b>	<b>1,067,214.77</b>	<b>260,128.44</b>	<b>7,542,115.65</b>	<b>9,027,925.85</b>	<b>1,485,810.20</b>	<b>15,023,097.56</b>	<b>7,480,981.91</b>	<b>50%</b>	<b>60%</b>
<b>EXPENSES</b>										
<b>PROGRAM SERVICES</b>										
<b>Direct Participant Services</b>										
Adult Contracted Programs (Career Path Services-CPS)	57,116.90	69,255.83	12,138.93	537,695.63	623,302.50	85,606.87	831,070.00	293,374.37	65%	75%
Dislocated Worker Contracted Programs (CPS)	75,096.60	82,878.00	7,781.40	658,039.67	745,902.00	87,862.33	994,536.00	336,496.33	66%	75%
Youth Contracted Programs (ResCare)	96,558.84	83,377.03	(13,181.81)	672,528.04	750,393.31	77,865.27	1,000,524.41	327,996.37	67%	75%
Incumbent Worker Training (CCAC)	-	-	-	11,433.03	24,250.96	12,817.93	24,250.96	12,817.93	47%	100%
Incumbent Worker Training Business Grants	-	-	-	-	30,000.00	30,000.00	150,000.00	150,000.00	0%	20%
Grays Harbor Foundation (CPS)	479.26	129.72	(349.54)	1,083.28	1,167.44	84.16	1,556.59	473.31	70%	75%
Rapid Response Increased Employment (CPS)	2,440.86	7,136.93	4,696.07	28,629.66	64,232.33	35,602.67	85,643.11	57,013.45	33%	75%
Rapid Response Increased Employment (ResCare)	19,875.72	9,768.08	(10,107.64)	91,487.46	87,912.71	(3,574.75)	117,216.95	25,729.49	78%	75%
TAP-Healthcare (SPSCC, Centralia College, Aberdeen SD)	53,368.47	21,279.12	(32,089.35)	151,505.38	191,512.10	40,006.72	191,512.10	40,006.72	79%	100%
Career Connect WA (CPS, ResCare, ESD113, AJAC)	40,200.18	52,360.00	12,159.82	263,515.75	471,240.00	207,724.25	701,933.36	438,417.61	38%	67%
Workforce Central-C2C	-	30,285.61	30,285.61	181,713.68	181,713.68	-	181,713.68	-	100%	100%
Choice Regional Health	38,570.05	20,000.00	(18,570.05)	109,573.05	125,000.00	15,426.95	1,100,000.00	990,426.95	10%	11%
DVR-Morningside & Arc of Grays Harbor	-	-	-	158,435.00	159,000.00	565.00	179,563.00	21,128.00	88%	89%
In House Programs										
WorkFirst	70,256.33	97,427.03	27,170.70	776,650.18	876,843.26	100,193.08	1,169,124.34	392,474.16	66%	75%
PREP	6,448.04	8,792.86	2,344.82	70,706.09	52,757.15	(17,948.94)	52,757.15	(17,948.94)	134%	100%
C2C, JBLM	30,068.41	171,970.24	141,901.83	873,102.85	1,134,521.68	261,418.83	1,643,128.45	770,025.60	53%	69%
OURR	42,311.67	35,000.00	(7,311.67)	148,161.46	237,000.00	88,838.54	988,653.00	840,491.54	15%	24%
JRA-MyJob	61,254.78	91,697.42	30,442.64	483,890.20	825,276.75	341,386.55	1,100,369.00	616,478.80	44%	75%
Career Connect Work Based Learning	4,150.56	5,565.00	1,414.44	21,947.03	50,085.00	28,137.97	83,483.72	61,536.69	26%	60%
Systems Navigation	16,730.77	21,199.62	4,468.85	98,730.99	133,697.71	34,966.72	190,796.57	92,065.58	52%	70%
<b>Subtotal Direct Participant Services</b>	<b>614,927.44</b>	<b>808,122.49</b>	<b>193,195.05</b>	<b>5,338,828.43</b>	<b>6,765,808.58</b>	<b>1,426,980.15</b>	<b>10,787,832.39</b>	<b>5,449,003.96</b>	<b>49%</b>	<b>63%</b>
<b>Business Services</b>										
B2B-(Thurston County Chamber)	40,844.62	33,333.33	(7,511.29)	297,553.70	300,000.00	2,446.30	400,000.00	102,446.30	74%	75%
B2B-C2C (TCC)	-	24,583.68	24,583.68	107,014.09	147,502.10	40,488.01	147,502.10	40,488.01	73%	100%
C2C-(Tacoma Pierce Chamber)	-	8,799.84	8,799.84	53,505.89	52,799.01	(706.88)	52,799.01	(706.88)	101%	100%
<b>Subtotal Business Services</b>	<b>40,844.62</b>	<b>66,716.85</b>	<b>25,872.23</b>	<b>458,073.68</b>	<b>500,301.11</b>	<b>42,227.43</b>	<b>600,301.11</b>	<b>142,227.43</b>	<b>76%</b>	<b>83%</b>
<b>Special Impact Projects</b>										
WBL/Uplift! Coordination	-	8,333.33	8,333.33	56,636.52	75,000.00	18,363.48	100,000.00	43,363.48	57%	75%
AmeriCorps	1,178.32	2,278.05	1,099.73	10,365.71	20,502.46	10,136.75	27,336.61	16,970.90	38%	75%
Pierce County Career Days	-	-	-	28,875.19	25,000.00	(3,875.19)	25,000.00	(3,875.19)	116%	100%
High Impact Community Projects	1,010.48	-	(1,010.48)	32,841.84	47,000.00	14,158.16	126,856.00	94,014.16	26%	37%
<b>Subtotal Special Impact Projects</b>	<b>2,188.80</b>	<b>10,611.38</b>	<b>8,422.58</b>	<b>128,719.26</b>	<b>167,502.46</b>	<b>38,783.20</b>	<b>279,192.61</b>	<b>150,473.35</b>	<b>46%</b>	<b>60%</b>
<b>Misc Contracts/Projects</b>										
Outreach & Communications	-	2,500.00	2,500.00	10,342.90	22,500.00	12,157.10	30,000.00	19,657.10	34%	75%
Industry Cluster Study	-	-	-	-	10,000.00	10,000.00	50,000.00	50,000.00	0%	20%
SeaKing-JRA/MyJOB	-	1,250.00	1,250.00	-	11,250.00	11,250.00	15,000.00	15,000.00	0%	75%
<b>Subtotal Misc Contracts/Projects</b>	<b>-</b>	<b>3,750.00</b>	<b>3,750.00</b>	<b>10,342.90</b>	<b>43,750.00</b>	<b>33,407.10</b>	<b>95,000.00</b>	<b>84,657.10</b>	<b>11%</b>	<b>46%</b>
<b>SUBTOTAL PROGRAM SERVICES</b>	<b>657,960.86</b>	<b>889,200.72</b>	<b>231,239.86</b>	<b>5,935,964.27</b>	<b>7,477,362.15</b>	<b>1,541,397.88</b>	<b>11,762,326.11</b>	<b>5,826,361.84</b>	<b>50%</b>	<b>64%</b>
<b>ADMINISTRATIVE SERVICES</b>										
<b>Administrative Office Operations</b>										
<b>Salaries &amp; Benefits</b>										
Salaries	77,248.00	83,099.86	5,851.86	711,527.78	752,173.53	40,645.75	1,004,120.13	292,592.35	71%	75%
Benefits	31,535.99	36,728.38	5,192.39	279,404.74	306,852.91	27,448.17	423,277.95	143,873.21	66%	72%
<b>Total Salaries &amp; Benefits</b>	<b>108,783.99</b>	<b>119,828.24</b>	<b>11,044.25</b>	<b>990,932.52</b>	<b>1,059,026.44</b>	<b>68,093.92</b>	<b>1,427,398.08</b>	<b>436,465.56</b>	<b>69%</b>	<b>74%</b>
<b>Travel &amp; Training Expenses</b>										

Mileage	298.40	500.00	201.60	2,513.14	4,500.00	1,986.86	6,000.00	3,486.86	42%	75%
Travel	1,118.52	1,250.00	131.48	5,240.90	11,250.00	6,009.10	15,000.00	9,759.10	35%	75%
Conf/Conv/Mtgs/Reg	50.95	550.00	499.05	3,550.75	9,450.00	5,899.25	11,100.00	7,549.25	32%	85%
Gasoline for PMWDC Vehicles	49.91	66.67	16.76	505.29	600.00	94.71	800.00	294.71	63%	75%
Board Travel	2,217.33	3,041.67	824.34	5,156.06	10,675.00	5,518.94	10,800.00	5,643.94	48%	99%
Board Supplies & Support	58.67	2,075.00	2,016.33	5,102.19	10,175.00	5,072.81	10,400.00	5,297.81	49%	98%
Staff develop/Training	-	750.00	750.00	189.00	6,750.00	6,561.00	9,000.00	8,811.00	2%	75%
<b>Total Staff Expenses</b>	<b>3,793.78</b>	<b>8,233.33</b>	<b>4,439.55</b>	<b>22,257.33</b>	<b>53,400.00</b>	<b>31,142.67</b>	<b>63,100.00</b>	<b>40,842.67</b>	<b>35%</b>	<b>85%</b>
<b>Professional Services</b>										
Accounting & Auditing	540.00	6,666.67	6,126.67	28,117.15	30,000.00	1,882.85	45,000.00	16,882.85	62%	67%
Legal Fees	-	300.00	300.00	405.00	2,700.00	2,295.00	3,600.00	3,195.00	11%	75%
Professional Services/Consult	4,114.16	7,383.33	3,269.17	43,866.83	66,450.00	22,583.17	88,600.00	44,733.17	50%	75%
Temp & Interim Contracts	14,003.21	208.33	(13,794.88)	26,906.05	1,875.00	(25,031.05)	2,500.00	(24,406.05)	1076%	75%
Licenses	872.15	2,233.33	1,361.18	22,996.77	20,100.00	(2,896.77)	26,800.00	3,803.23	86%	75%
<b>Total Professional Services</b>	<b>19,529.52</b>	<b>16,791.67</b>	<b>(2,737.85)</b>	<b>122,291.80</b>	<b>121,125.00</b>	<b>(1,166.80)</b>	<b>166,500.00</b>	<b>44,208.20</b>	<b>73%</b>	<b>73%</b>
<b>Facilities</b>										
Rent	4,456.60	7,440.08	2,983.48	50,309.83	66,960.75	16,650.92	89,281.00	38,971.17	56%	75%
Utilities	-	-	-	-	-	-	-	-	#DIV/0!	#DIV/0!
<b>Total Facilities</b>	<b>4,456.60</b>	<b>7,440.08</b>	<b>2,983.48</b>	<b>50,309.83</b>	<b>66,960.75</b>	<b>16,650.92</b>	<b>89,281.00</b>	<b>38,971.17</b>	<b>56%</b>	<b>75%</b>
<b>Supplies &amp; Communications</b>										
Supplies	961.89	1,041.67	79.78	8,253.13	9,375.00	1,121.87	12,500.00	4,246.87	66%	75%
Telephone & telecomm	320.05	1,229.17	909.12	5,578.95	11,062.50	5,483.55	14,750.00	9,171.05	38%	75%
Postage & Shipping	-	62.50	62.50	350.00	562.50	212.50	750.00	400.00	47%	75%
Mailing Services	-	33.33	33.33	458.29	300.00	(158.29)	400.00	(58.29)	115%	75%
Printing & copying	-	375.00	375.00	2,254.88	3,375.00	1,120.12	4,500.00	2,245.12	50%	75%
Books/Subscriptions/Ref	123.68	75.00	(48.68)	1,164.47	1,475.00	310.53	1,700.00	535.53	68%	87%
<b>Total Communications</b>	<b>1,405.62</b>	<b>2,816.67</b>	<b>1,411.05</b>	<b>18,059.72</b>	<b>26,150.00</b>	<b>8,090.28</b>	<b>34,600.00</b>	<b>16,540.28</b>	<b>52%</b>	<b>76%</b>
<b>Equipment/Maintenance/Software/Rental</b>										
IT Supplies/Minor Equipment/Tech Equip	1,021.17	208.33	(812.84)	11,134.70	11,125.00	(9.70)	12,500.00	1,365.30	89%	89%
Equipment Rental & maint	-	135.00	135.00	911.63	1,215.00	303.37	1,620.00	708.37	56%	75%
Auto Repair & Maintenance	-	166.67	166.67	182.97	1,500.00	1,317.03	2,000.00	1,817.03	9%	75%
Auto Lease	278.74	233.33	(45.41)	1,555.10	2,100.00	544.90	2,800.00	1,244.90	56%	75%
<b>Total Equipment/Small Tools</b>	<b>1,299.91</b>	<b>743.33</b>	<b>(556.58)</b>	<b>13,784.40</b>	<b>15,940.00</b>	<b>2,155.60</b>	<b>18,920.00</b>	<b>5,135.60</b>	<b>73%</b>	<b>84%</b>
<b>Depreciation</b>										
Depreciation-Automobile	1,243.52	2,077.50	833.98	4,594.18	6,232.50	1,638.32	8,310.00	3,715.82	55%	75%
Deprec & amort - other	-	-	-	-	-	-	-	-	#DIV/0!	#DIV/0!
<b>Total Depreciation</b>	<b>1,243.52</b>	<b>2,077.50</b>	<b>833.98</b>	<b>4,594.18</b>	<b>6,232.50</b>	<b>1,638.32</b>	<b>8,310.00</b>	<b>3,715.82</b>	<b>55%</b>	<b>75%</b>
<b>Other</b>										
Interest-general/Bank Fees	-	400.00	400.00	-	3,600.00	3,600.00	4,800.00	4,800.00	0%	75%
Insurance-Gen Liability	1,603.08	1,666.67	63.59	12,143.28	15,000.00	2,856.72	20,000.00	7,856.72	61%	75%
Membership Dues	325.36	170.00	(155.36)	13,104.01	15,260.00	2,155.99	15,770.00	2,665.99	83%	97%
Notifications	345.48	166.67	(178.81)	1,592.82	1,500.00	(92.82)	2,000.00	407.18	80%	75%
Other Expenses	15.57	83.33	67.76	2,091.54	2,750.00	658.46	3,000.00	908.46	70%	92%
Community Outreach/Ed	-	2,500.00	2,500.00	21,342.29	22,500.00	1,157.71	30,000.00	8,657.71	71%	75%
Contractor Support/In Kind	-	-	-	441.55	-	(441.55)	-	(441.55)	#DIV/0!	#DIV/0!
Transfer to Unrestricted	-	(1,000.00)	(1,000.00)	(4,872.79)	(3,750.00)	1,122.79	(3,750.00)	1,122.79	130%	100%
<b>Total Other</b>	<b>2,289.49</b>	<b>3,986.67</b>	<b>1,697.18</b>	<b>45,842.70</b>	<b>56,860.00</b>	<b>11,017.30</b>	<b>71,820.00</b>	<b>25,977.30</b>	<b>64%</b>	<b>79%</b>
<b>Subtotal Admin Office Operating Budget</b>	<b>142,802.43</b>	<b>161,917.49</b>	<b>19,115.06</b>	<b>1,268,072.48</b>	<b>1,405,694.69</b>	<b>137,622.21</b>	<b>1,879,929.08</b>	<b>611,856.60</b>	<b>67%</b>	<b>75%</b>
<b>Transition &amp; AJC Activities</b>	<b>3,337.50</b>	<b>5,679.89</b>	<b>2,342.39</b>	<b>36,955.90</b>	<b>51,119.02</b>	<b>14,163.12</b>	<b>68,158.69</b>	<b>31,202.79</b>	<b>54%</b>	<b>75%</b>
<b>One Stop Operator</b>	<b>8,578.84</b>	<b>10,416.67</b>	<b>1,837.83</b>	<b>72,405.02</b>	<b>93,750.00</b>	<b>21,344.98</b>	<b>125,000.00</b>	<b>52,594.98</b>	<b>58%</b>	<b>75%</b>
	-	-	-	-	-	-	-	-	0%	0%
<b>SUBTOTAL ADMINISTRATIVE SERVICES</b>	<b>154,718.77</b>	<b>178,014.05</b>	<b>23,295.28</b>	<b>1,377,433.40</b>	<b>1,550,563.70</b>	<b>173,130.30</b>	<b>2,073,087.77</b>	<b>695,654.37</b>	<b>66%</b>	<b>75%</b>
<b>TOTAL EXPENSES</b>	<b>812,679.63</b>	<b>1,067,214.77</b>	<b>254,535.14</b>	<b>7,313,397.67</b>	<b>9,027,925.85</b>	<b>1,714,528.18</b>	<b>13,835,413.88</b>	<b>6,522,016.21</b>	<b>53%</b>	<b>65%</b>
<b>Change in Net Assets</b>	<b>(5,593.30)</b>	<b>-</b>	<b>5,593.30</b>	<b>228,717.98</b>	<b>-</b>	<b>(228,717.98)</b>	<b>1,187,683.68</b>			
Beginning Net Assets	1,148,348			927,569						
Plus current Net Assets	(5,593)			228,718						
Change in special funds	(597)			(14,130)						
Ending Net Assets Without Donor Restrictions	1,142,157			1,142,157						

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

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Through March 31, 2019





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

**March 31, 2019**

	<b>Beginning Year Balance</b>	<b>Current Period Balance</b>	<i>Current Year Change</i>	<b>Beginning Period Balance</b>	<i>Current Period Change</i>
<b>Assets</b>					
Cash & Cash Equivalents	291,256	564,333	273,077	632,664	(68,331)
Accounts Receivable	1,912,240	1,346,028	(566,212)	1,171,400	174,628
Due from Related Parties	0	0	0	0	0
Notes Receivable	0	75	75	75	0
Pre-Paid Expenses	32,402	37,128	4,726	39,494	(2,366)
Investments - CD's	226,655	228,705	2,050	228,472	233
Long-Term Assets	<u>31,133</u>	<u>39,794</u>	<u>8,661</u>	<u>42,695</u>	<u>(2,901)</u>
Total Assets	<u>2,493,686</u>	<u>2,216,063</u>	<u>(277,623)</u>	<u>2,114,800</u>	<u>101,263</u>
<b>Liabilities</b>					
Contracts & Vendors Payable	1,179,643	672,235	(507,408)	577,805	94,430
Payroll, Taxes, & Benefits Payable	266,673	284,607	17,934	272,772	11,835
Paid Leave Payable	104,401	100,426	(3,975)	102,927	(2,501)
Deferred Revenues	6,457	5,075	(1,382)	5,075	0
Other Short-Term Payables	<u>8,943</u>	<u>11,562</u>	<u>2,619</u>	<u>7,873</u>	<u>3,689</u>
Total Liabilities	<u>1,566,117</u>	<u>1,073,905</u>	<u>(492,212)</u>	<u>966,452</u>	<u>107,453</u>
Net Assets without donor restrictions	<u>927,569</u>	<u>1,142,158</u>	<u>214,589</u>	<u>1,148,348</u>	<u>(6,190)</u>
<b>Total Net Assets</b>	<b><u>927,569</u></b>	<b><u>1,142,158</u></b>	<b><u>214,589</u></b>	<b><u>1,148,348</u></b>	<b><u>(6,190)</u></b>
Total Liabilities and Net Assets	<u>2,493,686</u>	<u>2,216,063</u>	<u>(277,623)</u>	<u>2,114,800</u>	<u>101,263</u>

**Pacific Mountain Workforce Development Council**  
**STATEMENT OF CASH FLOWS**  
*March 31, 2019*

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	<u>Current Period</u>	<u>Current Year</u>
<b>Cash Flows from Operating Activities</b>		
Receipts from Grants	628,642.32	8,037,826.86
Receipts from Contributors/Events	3,816.47	74,627.63
Depreciation (Net)	0.00	0.00
Payments to Suppliers	40,812.53	(1,038,583.05)
Payments to Employees	(297,113.61)	(2,737,363.96)
Payments to Program/Participant Activities	(444,489.06)	(4,046,067.09)
Total Cash Flows from Operating Activities	<u>(68,331.35)</u>	<u>290,440.39</u>
<b>Cash Flows from Investing Activities</b>		
Purchases of Equipment/Assets	0.00	(17,363.83)
Proceeds from Sale of Current Assets	0.00	0.00
Interest and Dividends	232.85	2,049.96
Purchases or Redemptions of Investments	(232.85)	(2,049.96)
Total Cash Flows from Investing Activities	<u>0.00</u>	<u>(17,363.83)</u>
<b>Beginning Cash &amp; Cash Equivalents</b>	<u>632,664.05</u>	<u>291,256.14</u>
<b>Ending Cash &amp; Cash Equivalents</b>	<u>564,332.70</u>	<u>564,332.70</u>



June 13, 2019

Due to personnel changes, Columbia Bank signature card for Acct ending 8396 requires updating. Jacquelin Earley, needs to be added to Acct ending 8396 as the new Chairperson and Duane Evans removed as he is no longer the PacMtn Chairperson effective July 1, 2019.

**Current Columbia Bank signers**

***Acct ending 8396- Restricted Funds***

Cheryl Fambles  
Duane Evans  
Corinne Daffern  
Sean Murphy  
Jage Curl

**Add to Acct ending 8396**

Jacquelin Earley

**Delete to Acct ending 8396**

Duane Evans

**After June 14, 2019 Executive Finance Committee Meeting**

***Acct ending 8396- Restricted Funds***

Jage Curl  
Corinne Daffern  
Jacquelin Earley  
Cheryl Fambles  
Sean Murphy



## MEMORANDUM

To: PacMtn EFC Members

From: Cheryl B. Fambles, CEO  
Bridget Lockling, Finance & Administrative Services Advisor  
Jaime Britton, Fiscal & Administrative Services Coordinator

Date: June 27, 2019

Subject: PY19 Preliminary Final Budget

**PY19 Preliminary Final Budget:** The attached budget documents reflect the proposed budget for our 2019 Program Year beginning July 1, 2019. These documents are provided to give you a summary of the budget and detail changes expected for the upcoming year.

As a reminder this version of the budget provides us a starting point for an operational budget to begin our new program year. We do not have actual grant award amounts or final determinations of carry-in funding so revenue and expenses are based on estimates and assumptions. Some new projects are not yet fully determined or structured so funding is ear marked with details to be developed. The Final version of the budget provided in the Fall will be corrected to show actual awards, carry-in funds, contract and project expenses.

### **Revenue Projections**

Our revenue forecast for PY19 is 11,929,761. The WIOA Formula awards for PY19 are fairly solid projections provided by ESD. We anticipate our WIOA Formula dollars to slightly increase in our Youth and Adult WIOA formula program, and decrease in DW. Our anticipated WIOA Formula carry-in dollars for PY19 is larger for our Adult, DW, and Youth grants, both from administration office carry in and contractor carry in.

Our compliment of competitive awards has changed with more new grants than expiring competitive WIOA grants. There will be four WIOA competitive grants active at the beginning of the program year, dealing with the opioid use crisis and impacts in this region, Career Connected Learning and Rapid Response.

PY19 begins a new two year cycle for the MyJOB partnership with Juvenile Rehabilitation and Division Vocab Rehab. Commerce Community Jobs Program serving TANF 2 customers will continue through PY19. We are still unsure of the allocations in WorkFirst/TANF funds for next year but anticipate starting with a similar amount of funds.

TANF/Community Jobs and My JOB use pay points earned as the basis for payment. Earning revenue to cover costs promotes a focus on outputs deemed critical to successful outcomes and helps the funder to see value in the service. While it is possible to earn revenue in excess of expense, it also carries significant risk. The model must allow for the correct amount of staff to



perform necessary tasks that make the revenue to support the entire cost of the program. PacMtn has no ability to subsidize these operations should pay points not be made.

All these competitive grants play an important role in picking up portions of staff time, overhead and admin that help shift the burden from our Formula grants. Our WIOA Formula grants now reflect 43.9% of the overall budget, higher than the last couple of years. While our competitive grants reflect less than what we've experienced the last couple of years.

### **Expense Projections and Board Guidance**

Pursuant to the intentions of WIOA and State policy, the majority of our revenues are contracted back out to procured vendors to deliver services that adhere to the objectives of the award. These services are identified as either Direct Participant Services, Business Services & Solutions, Special Impact Projects or Misc. Contracts & Projects. Our emphasis is on providing services that reach and add value for our customers-both job seekers and employers.

From our Budget Workshop, Budget Q&A, January Board Retreat and discussions over the course of the year we continued projects that you identified as important and have set-a-side funds to explore new opportunities that respond to your suggestions and guidance. Cited amounts are only the NEW allocations and do not represent any carry-forward funds previously dedicated to this use. The budget line item will likely show the entire amount both new funds and carry-forward.

- **High Impact Community Grants--\$50k**, supporting grants for community-based organizations whose youth, work-based learning focus aligns with PacMtn's work.
- **Open Lab at WorkSource Thurston--\$20K**: Provides additional hands-on learning for individuals who need greater assistance with adult basic education preparations, including GED, job search and employment preparations.
- **Board Directed Community Outreach grants--\$20K** will respond to specific community-based programming that allows for positive return on the specific workforce funds we invest.
- **Support for EDC Vitality Indexing--\$15K** will provide the EDC with funds that augment their efforts to develop information and inform their community on the health of their communities.
- **Enhanced Career Tech Education Connections in the Community--\$15K** In partnership with and alignment with ESD 113 and school district CTE directors we would identify ways to help promote CTE in communities, with students, teachers and parents.
- **PacMtn One-Stop Operator-- \$100k**. PacMtn procured One Stop Operator is the WorkSource Operations Regional Collaborative (Collaborative) composed of Employment Security Department, Thurston County Chamber and PacMtn Workforce Development Council leaders. These funds provide the actual consulting and system training services necessary for the operation of the system.
- **Targeted Industry Cluster Study - \$45k**: The last in-depth report was completed in Sept of 2012. These funds would provide resources to update the report based on current data, as aligned with our strategic plan. This is a carry-forward of funds allocated in PY19, but due to staff vacancies we were unable to award the RFP. Work has begun with



completion in early fall. It is possible the updated data could be incorporated into a region wide Comprehensive Economic Development Strategy, which would support the possible develop of a region wide Economic Development District. The EDCs would lead any such effort of that kind. This Update will also form the basis of PacMtn's Strategic Plan Update due to the Governor in late 2020.

- **Incumbent Worker Revolving Fund** - \$50k: PY17 was the first year we dedicated funds for this WIOA permitted activity. We want to continue with this funding opportunity to help support local employers and their employees in our identified sectors. This allows more employers to apply for funding that could support employees training requirements that spur financial growth and/or avert layoffs. There exists significant amount of carry-forward from PY18 allocations.
- **Administrative Operations Budget**  
Administration office budget shows a few changes, although minor in dollars compared to our total budget. Percent of administrative overhead has historically run 15%. This year's total administrative office cost to sustain the organization is \$2,150,464 or 18.5% of the entire budget. The Administrative office budget is part of a larger Administrative Services budget that also includes WIOA Transition activities, AJC support and the One Stop Operator contract. The total budget for all administrative service categories are \$2,304,425 or 19.8% of the total budget.

In the Admin Office budget the following additional resources will allow us to continue effectively managing the workload and expectations.

1. Cost of living adjustment (COLA), 2% for all employees = \$20K.
  2. New performance review process to recognize service years and merit increases will impact the budget approximately \$30K.
  3. An additional \$7500 provides performance incentives for employees who demonstrated exceptional performance in PY18.
  4. A new Staff Development Fund at \$10,000 ensures we are responsive to staff professional development and maintain the changes happening in the industry.
  5. Accounting Services budget will increase to accommodate additional software, system development and training. \$20K
  6. Proposing two new positions and increasing two existing .5 FTE positions to improve support for programs approximate value \$220K:
    - i. Financial Services Specialist will respond to the workload volume in the number of contracts, invoices and fiscal inquiries
    - ii. Senior Contracts Coordinator will support Workforce Services in oversight and support of the multiple contracts and contractor needs.
    - iii. Add FTE to create a full time IT and Marketing/Communications positions
- **Unrestricted Funds Budget**
    1. \$10,000--*Employee Team Productivity Fund* for activities that promote a healthy, productive team environment, essential to achievement of outcomes, but are not

supported by federal funds. This funding will leverage small amount of Wellness Funds we receive from the Health benefits provider.

2. **\$56,800 Support for AmeriCorps** (14,200/per = \$9000 placement fee and \$5200 for impact of minimum wage changes)-- In late May we received notice DSHS would no longer fund the AmeriCorps placement fee and increased minimum wage costs. Since 2013 PacMtn has used the service of AmeriCorps to create quality learning experiences for new workforce professionals. AmeriCorps service enabled deeper service level connections for youth served in our region. The AmeriCorps of this region are the primary deliverers of UPLIFT! our career readiness 40 hr. curriculum. We have previously used AmeriCorps in support of DVR Summer Internship Program, MyJOB, supporting youth connections to ResCare services and at Camo2Commerce. This request funds 4 AmeriCorps Members provides minimum coverage of our efforts. This is not intended as an ongoing commitment, but will give us the year to revise our delivery system and determine what other sources of funding are available. We have requested and if we receive special permission to use our federal funds for AmeriCorps we will reduce some of the ask from the Unrestricted Fund.
3. **\$14,366—Buy-out current lease of 2016 Camry.** Based on conversations at the Budget Workshop Staff completed an analysis of the PacMtn Car Fleet.

<u>Vehicle</u>	<u>Own/Lease</u>	<u>Current Fleet</u>	<u>Action</u>	<u>Budget Impact</u>
OLD Nissans	Own	3	SELL	\$3000 Reduces Add'l Lease Costs
2014 Camry	Own	2	HOLD	0
2016 Camry	Lease	1	BUY-OUT LEASE	\$14,366
2019 Camry	Lease	0	ENTER NEW LEASE FOR 2 VEHICLES	\$550/mo.

**Motion to Approve**

This budget reflects a progressive and thoughtful way to continue fulfilling our requirements and delivering quality workforce services in the region. We recommend a motion to approve the PY19 Preliminary Final Budget, as presented or revised by the Executive Finance Committee.



# PY 19 Revenues - \$11,929,761

**WIOA Formula Grants**  
\$5,241,324

Admin Cost Pool  
\$875,977

Adult \$1,545,871

Dislocated Worker  
\$1,541,971

Youth \$1,278,186

43.9%

**WIOA Competitive Grants**  
\$3,422,789

Opioid Reduction  
\$1,783,293

Career Connect WA  
\$461,991

RR Increased Emp  
\$462,005

Opioid Homeless  
\$715,500

28.7%

**Dept of Commerce Grants**  
1,370,130

WorkFirst  
\$1,370,130

11.5%

**DSHS Grants**  
\$1,593,180

DVR  
\$293,180

JRA MyJOB  
\$1,300,000

13.4%

**Other, State, Local Funding**  
302,338

Thurston Co. Jail  
\$69,370

Pierce County CD  
\$32,000

Dawkins Trust  
\$37,000

Grays Harbor Foundation  
\$110

Boeing \$149,920

Saltchuk \$3,938

2.5%

# PY 19 Expenses - \$11,615,836

**Direct Participant Services**

- Adult/DW (Career Path)
- Youth (ResCare)
- In-house Programs

**\$8,185,085**

- MyJOB
- Summer Internships
- OURR

70.5%

**Business Services & Solutions**

- Thurston Co. Chamber

**\$472,716**

4.1%

**Special Impact Projects**

- WorkBased Learning, Uplift!, AmeriCorps
- High Impact Projects

**\$577,402**

- Incumbent Worker
- WBL-Uplift!

5.0%

**Misc Contracts**

- EDC Support
- Industry Cluster Study

**\$76,208**

- Communication Strategies & Outreach Materials

0.7%

**Administrative Services**

- Admin Office Operations
- One Stop Operator

**\$2,304,425**

- System support & Development
- AJC Support

19.8%



## Workforce Innovation and Opportunity Act (WIOA) “Formula” Grants

### PY19 Youth - Department of Labor WIOA Funds

<b>Project Term:</b>	04/01/2019 – 06/30/2021	<b>Participants:</b>	440
<b>Carry In Funds:</b>	\$ 63,034.54	<b>Total PY19 Funds:</b>	\$1,278,185.54
<b>PY19 Funds:</b>	\$ 1,215,151.00		
<b>FY19 Funds:</b>	N/A		

**Project Summary:** To enhance youth education, encourage school completion through alternative educational programs, and provide exposure to the world of work through apprenticeship and career exploration.

**Major Partners:** Res Care Services

**Target Participants:** Young people who are ages 14 through 24, who are low income, and who may need help to complete an educational program or find and hold employment. To be low income, one must be receiving welfare or food stamps, homeless, a foster child, or have a family income that meets specific income guidelines.

### PY19 Adult- Department of Labor WIOA Funds

<b>Project Term:</b>	07/01/2019 – 06/30/2021	<b>Participants:</b>	315
<b>Carry In Funds:</b>	\$ 343,687.31	<b>Total PY19 Funds:</b>	\$ 1,545,871.31
<b>PY19 Funds:</b>	\$ 153,084.00		
<b>FY20 Funds:</b>	\$ 1,049,100.00		

**Project Summary:** The program goal is to increase employment and employment retention for participants and to provide employers with a skilled workforce and qualified applicants.

**Major Partners:** Career Path Services, Employment Security Department, Training providers

**Target Participant:** People who are 18 years and older, are legally entitled to work in the United States and have met selective service registration requirements.

### PY19 Dislocated Worker - Department of Labor WIOA Funds

<b>Project Term:</b>	07/01/2018 – 06/30/2020	<b>Participants:</b>	328
<b>Carry In Funds:</b>	\$ 430,577.01	<b>Total PY19 Funds:</b>	\$ 1,541,971.01
<b>PY19 Funds:</b>	\$ 175,625.00		
<b>FY20 Funds:</b>	\$ 935,769.00		

**Project Summary:** The program goal is to increase employment and employment retention for its participants and to provide employers with a skilled workforce and qualified applicants.

**Major Partners:** Career Path Services, Employment Security Department, Training Providers

**Target Participants:** Workers who lost jobs due to plant closures, company downsizing, or some other significant change in market conditions. In most cases, it must be unlikely that these dislocated workers will return to their previous employment, and they must be eligible for (or have exhausted) unemployment compensation. Other conditions can lead to eligibility, such as being self-employed (but not working as a result of general economic conditions), or being a displaced homemaker.

<b>PY19 Admin Cost Pool – Department of Labor WIOA Funds</b>			
<b>Project Term:</b>	07/01/2019 – 06/30/2021	<b>Participants:</b>	N/A
<b>Carry In Funds</b>	\$ 483,216.35	<b>Total PY19 Funds:</b>	\$ 875,296.35
<b>PY19 Funds:</b>	\$ 171,539.00		
<b>FY20 Funds:</b>	\$ 205,541.00		
<b>Project Summary:</b> Admin costs to support administrative functions of WIOA formula funds.			

## Competitive Grants

<b>Opioid 2 - Homeless</b>			
<b>Project Term:</b>	01/01/2019 – 12/31/2020 (Total Grant Award \$715,500)	<b>Participants:</b>	80
		<b>Total PY19 Funds:</b>	\$715,500.00
<b>Project Summary:</b> Provide disaster-relief employment to alleviate the issues caused by opioid crisis in affected communities. Additionally, serve eligible individuals by connecting them to career, training and supportive needed to gain long-term employment.			
<b>Major Partners:</b>			
<b>Target Participants:</b> Dislocated workers and others affected by the opioid crisis			
<b>OURR-Opioid Use Reduction &amp; Recovery</b>			
<b>Project Term:</b>	08/01/2018 – 06/30/2020 (Total Grant Award \$2,400,000)	<b>Participants:</b>	300
		<b>Total PY19 Funds:</b>	\$ 1,783,293.16
<b>Project Summary:</b> Demonstration project to address the economic and workforce impacts associated with opioid misuse. Provides training and support to job seekers and incumbent workers while building a cadre of skilled workers who can impact the causes and treatment of the opioid crisis.			
<b>Major Partners:</b> Choice Regional Health, Family Education & Support Services, DSHS, Juvenile Rehabilitation, County Health Departments, Behavior Health Resources, City of Olympia, WA Hospitality			
<b>Target Participants:</b> Dislocated workers and others affected by the opioid crisis			
<b>Rapid Response Increased Employment PY18</b>			
<b>Project Term:</b>	07/01/2018 - 06/30/2020	<b>Participants:</b>	84
		<b>Total PY19 Funds:</b>	\$462,004.66
<b>Project Summary:</b> Provide staffing and direct service and support to continue impact at JBLM to serve returning military and spouses.			
<b>Major Partners:</b>			
<b>Target Participants:</b> Transitioning military and spouses			
<b>Career Connect WA</b>			
<b>Project Term:</b>	01/01/2018 – 09/30/2019	<b>Participants:</b>	50
		<b>Total PY19 Funds:</b>	\$ 461,990.69
<b>Project Summary:</b> Increase youth participation in high-impact, comprehensive Career Connected Learning Experiences and support the expansion of registered apprenticeships for you and/or adults.			

**Major Partners:** AJAC, Career Path Services, ResCare, ESD 113, Timberland Library, PEI,

**Target Participants:** Adults and Youth

## WorkFirst Grants

### Department of Commerce – Work First PY18

**Project Term:** 07/01/2019 - 06/30/2020 **Participants:** 900

**Total PY19 Funds:** \$ 1,370,130.00

**Project Summary:** A multi county WorkFirst Program which provides opportunities for participants to learn and develop marketable employment skills, gain work experience as well as confidence.

**Major Partners:** DSHS, Employment Security Department, and Community Colleges in Thurston, Mason and Lewis counties.

**Target Participants:** WorkFirst parents are those receiving temporary aid to needy families and referral from DSHS in Thurston, Mason and Lewis counties.

## Other Grants

### Thurston County Jail Pre-Employment Skills

**Project Term:** 01/01/2019 - 12/31/2019 **Participants:** 100

**Total PY19 Funds:** \$ 69,370.00

**Funding Note:** 2018 funding of \$119,343

**Project Summary:** Pre-employment skills training workshops for the Drug Court population and job search services for Work Release inmates referred to Thurston County WorkSource.

**Major Partners:** Thurston County Sheriff's Office and Employment Securities Department

**Target Participants:** Offenders who are preparing for release or who are in work release and housed in Thurston County Jail.

### MyJOB Juvenile Rehabilitation (JRA) Employment Pathway Program

**Project Term:** 07/01/2019 – 06/30/2021 (Total Grant Award \$ 2,600,00.00) **Participants:** 1350

**Total PY19 Funds:** \$ 1,300,000.00

**Project Summary:** To better prepare youth, ranging from ages 13 to 21, for a pathway to employment in RA's juvenile institutions and community facilities.

**Major Partners:** DSHS, DVR, Green Hill School, Naselle Youth Camp, Echo Glen Children's Center

**Target Participants:** Youth within juvenile institutions and community facilities

### DVR Pre-Employment Skills Training

**Project Term:** 03/16/2018 – 03/15/2020 (Total Grant Award \$ 496,000.50) **Participants:** 90

**Total PY19 Funds:** \$ 293,180.00

**Project Summary:** Pre-employment transition services to students with disabilities ranging from 16 to 21, who have Individualized Educational Programs (IEPs) or 504 Plans, or disabilities that qualify students for special education under the Individuals with Disabilities Education Act (IDEA) or accommodations under Section 504 of the Rehabilitation Act of 1973, as amended.

**Major Partners:** DSHS; Morningside, ARC of Grays Harbor, and Grays Harbor Youth Works

PacMtn PY19 Preliminary Budget Grant Tracking

<b>Target Participants:</b> Students with disabilities ranging from 16 to 21 with IEP or 504 plans.			
<b>Saltchuk</b>			
<b>Project Term:</b>	No End Date (Total contribution of \$27,500)	<b>Participants:</b>	N/A
		<b>Total PY19 Funds:</b>	\$ 3,937.51
<b>Project Summary:</b> Support for networking and hiring events and scholarship fund			
<b>Major Partners:</b> Interstate, Saltchuk			
<b>Target Participants:</b> Transitioning service members			
<b>Grays Harbor Foundation Grant*</b>			
<b>Project Term:</b>	No End Date (Total Grant Award \$ 76,500)	<b>Participants:</b>	N/A
		<b>Total PY19 Funds:</b>	\$ 110.00
<b>Project Summary:</b> Provide support services for dislocated workers in Grays Harbor.			
<b>Major Partners:</b> Dr. Mandich Foundation			
<b>Target Participants:</b> Dislocated Workers in Grays Harbor.			
<b>Boeing</b>			
<b>Project Term:</b>	No end date (Total Grant Award \$150,000)	<b>Participants</b>	N/A
		<b>Total PY19 Funds:</b>	\$ 149,920.40
<b>Project Summary:</b> Provide training for transitioning military at JBLM			
<b>Major Partners:</b>			
<b>Target Participants:</b> Transitioning military members			
<b>Pierce County Career Days</b>			
<b>Project Term:</b>	No end date	<b>Participants</b>	N/A
		<b>Total PY19 Funds:</b>	\$ 32,000.00
<b>Project Summary:</b> Supports construction career exploration for youth in regions school districts			
<b>Major Partners:</b> Rescare, Workforce Central, local construction companies and unions			
<b>Target Participants:</b> In School Youth			
<b>Dawkins Trust</b>			
<b>Project Term:</b>	No End Date (Total Grant Award \$ 49,000)	<b>Participants:</b>	N/A
		<b>Total PY19 Funds:</b>	\$ 37,000.00
<b>Project Summary:</b> Provide funds for Youth Uplift! support and supplies			
<b>Major Partners:</b>			
<b>Target Participants:</b> Youth			

Healthcare Authority			
<b>Project Term:</b>	04/12/2019 - 09/30/2019	(Total Grant Award \$ 10,000)	<b>Participants:</b> N/A
		<b>Total PY19 Funds:</b>	\$ 10,000.00
<b>Project Summary:</b> To increase the availability of services linked to Evidence-Based Practice Supported Employment (EBP SE) for adults identified as the target population through collaborative efforts and implementation of new resources as it relates to behavioral health programs.			
<b>Major Partners:</b>			
<b>Target Participants:</b> Adults			

	Funding	Participants
<b>Total PY19 Funds and Participants Served</b>	<b>\$ 11,929,760.63</b>	<b>4,037</b>

Pacific Mountain Workforce Development Council  
 Program Year 2019  
 July 1, 2019 - June 30, 2020  
 Prelim Budget by Budget Category



	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total
<b>Budgeted Revenues:</b>						
<b>Workforce Innovation and Opportunity Act (WIOA) 'Formula' Grants</b>						
WIOA Admin Cost Pool (ACP)	-	-	-	15,000.00	860,296.35	875,296.35
WIOA Adult	869,976.50	211,529.00	112,937.00	19,792.08	331,636.73	1,545,871.31
WIOA Dislocated Worker	914,922.00	207,686.00	150,000.00	24,537.77	244,825.24	1,541,971.01
WIOA Youth	917,883.30	-	148,363.00	16,878.17	195,061.07	1,278,185.54
<i>Subtotal</i>	2,702,781.80	419,215.00	411,300.00	76,208.02	1,631,819.39	5,241,324.21
<b>Competitive WIOA' Grants</b>						
Opioid Reduction (8/1/18-6/30/20)	1,621,245.97	-	-	-	162,047.19	1,783,293.16
Career Connect WA (1/1/18-9/30/19)	323,945.00	-	62,210.00	-	75,835.69	461,990.69
PY18 Rapid Response Increased Emp (7/1/18-6/30/20)	338,988.31	53,501.44	30,892.00	-	38,622.91	462,004.66
Opioid Homeless (01/01/19-06/30/20)	657,000.00	-	-	-	58,500.00	715,500.00
<i>Subtotal</i>	2,941,179.28	53,501.44	93,102.00	-	335,005.79	3,422,788.51
<b>Department of Commerce Grants</b>						
WorkFirst (Community Jobs) (7/1/19-6/30/20)	1,090,104.00	-	6,000.00	-	274,026.00	1,370,130.00
<b>Department of Social &amp; Health Services Grants</b>						
Dept of Voc Rehabilitation -PreEmployment Skills (3/16/18-3/15/20)	260,128.00	-	-	-	33,052.00	293,180.00
Juvenile Rehabilitation - My JOB (7/1/19-6/30/21)	975,000.00	-	-	-	325,000.00	1,300,000.00
<i>Subtotal</i>	1,235,128.00	-	-	-	358,052.00	1,593,180.00
<b>Other Grants</b>						
Thurston County Jail Program (1/1/19 - 12/31/19)	60,000.00	-	-	-	9,370.00	69,370.00
Pierce County Career Day	-	-	30,000.00	-	2,000.00	32,000.00
Dawkins Trust	-	-	37,000.00	-	-	37,000.00
GH Foundation	110.00	-	-	-	-	110.00
Healthcare Authority	10,000.00	-	-	-	-	10,000.00
Boeing	141,844.38	-	-	-	8,076.02	149,920.40
Saltchuk	3,937.51	-	-	-	-	3,937.51
<i>Subtotal</i>	215,891.89	-	67,000.00	-	19,446.02	302,337.91
<b>Total Revenue</b>	<b>8,185,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>2,618,349.20</b>	<b>11,929,760.63</b>

**Budgeted Expenditures:**

Program Services	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total
<b>WIOA Formula</b>						
Adult Contracted Programs (Career Path Services)	869,976.50	-	-	-	-	869,976.50
Dislocated Worker Contracted Programs (Career Path Services)	853,515.00	-	-	-	-	853,515.00
Youth Contracted Programs (ResCare)	917,883.30	-	-	-	-	917,883.30
Incumbent Worker Training (TBD)	-	-	150,000.00	-	-	150,000.00
JBLM In-house Program	61,407.00	-	-	-	-	61,407.00
Business Services (Thurston Co. Chamber)	-	419,215.00	-	-	-	419,215.00
System Navigators-Triage, Outreach, UI support	-	-	57,937.00	-	-	57,937.00
Work-Based Learning/Career Connections/AmeriCorps support	-	-	98,363.00	-	-	98,363.00
High Impact Grants-Youth & Young Adult	-	-	70,000.00	-	-	70,000.00
Enhanced CTE Connections	-	-	15,000.00	-	-	15,000.00
Open Lab	-	-	20,000.00	-	-	20,000.00
Industry Cluster Study	-	-	-	45,000.00	-	45,000.00
Outreach	-	-	-	16,208.02	-	16,208.02
EDC Support	-	-	-	15,000.00	-	15,000.00
<i>Subtotal</i>	2,702,781.80	419,215.00	411,300.00	76,208.02	-	3,609,504.82
<b>WIOA Competitive</b>						
Opioid Use & Reduction Response In-house	778,668.63	-	-	-	-	778,668.63
Opioid Use & Reduction Response Contracted (Choice)	842,577.34	-	-	-	-	842,577.34
Opioid 2 Homeless In-house	657,000.00	-	-	-	-	657,000.00
JBLM In-house Program (PY18 RRIE)	293,988.31	-	-	-	-	293,988.31
Career Connect In-house Program	-	-	78,102.00	-	-	78,102.00
Career Connect WA (CPS, ResCare, AJAC, ESD113)	323,945.00	-	-	-	-	323,945.00
High Impact Grants-CCL	-	-	15,000.00	-	-	15,000.00
Rapid Response Increased Employment Contracted (CPS, TCC)	45,000.00	53,501.44	-	-	-	98,501.44
<i>Subtotal</i>	2,941,179.28	53,501.44	93,102.00	-	-	3,087,782.72

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total
<b>WorkFirst &amp; Other</b>						
<i>WorkFirst In-house Program Thurston, Mason, Lewis Co.</i>	1,090,104.00	-	6,000.00	-	-	1,096,104.00
<i>Thurston County PREP Jail In house Program</i>	60,000.00	-	-	-	-	60,000.00
<i>Pierce County Career Days</i>	-	-	30,000.00	-	-	30,000.00
<i>Dawkins Trust</i>	-	-	37,000.00	-	-	37,000.00
<i>DVR - Contracted</i>	260,128.00	-	-	-	-	260,128.00
<i>JRA In-house Program</i>	975,000.00	-	-	-	-	975,000.00
<i>Grays Harbor Foundation</i>	110.00	-	-	-	-	110.00
<i>Boeing</i>	141,844.38	-	-	-	-	141,844.38
<i>Healthcare Authority</i>	10,000.00	-	-	-	-	10,000.00
<i>Saltchuk</i>	3,937.51	-	-	-	-	3,937.51
<i>Subtotal</i>	2,541,123.89	-	73,000.00	-	-	2,614,123.89
<b>Program Expense Total</b>	<b>8,185,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>-</b>	<b>9,311,411.43</b>

**Administrative Services**

<b>Administrative Office Operations</b>						
Salaries					1,195,059.82	1,195,059.82
Benefits					501,704.16	501,704.16
Travel & Training					64,000.00	64,000.00
Professional Services					139,860.00	139,860.00
Facilities					89,281.00	89,281.00
Supplies & Communications					60,050.00	60,050.00
Equip/Maintenance/Rentals					18,920.00	18,920.00
Depreciation					8,310.00	8,310.00
Insurance					20,000.00	20,000.00
Memberships					16,479.00	16,479.00
Board Community Outreach					20,000.00	20,000.00
Community Outreach					10,000.00	10,000.00
Misc					10,800.00	10,800.00
<u>Transfer to Unrestricted</u>					(4,000.00)	(4,000.00)
Admin Office Subtotal					2,150,463.98	2,150,463.98
<b>Transition &amp; AJC Activities</b>						
Staffing					-	-
<u>Subcontracts</u>					25,500.76	25,500.76
Transition Subtotal					25,500.76	25,500.76
<b>One Stop Operator</b>						
Staffing					-	-
<u>Subcontracts</u>					128,459.98	128,459.98
One Stop Operator Subtotal					128,459.98	128,459.98
<b>Administrative Expense Total</b>					<b>2,304,424.72</b>	<b>2,304,424.72</b>

<b>Total Expenditures</b>	<b>8,185,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>2,304,424.72</b>	<b>11,615,836.15</b>
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<i>Admin Office Formula Carry Forward to PY19</i>	<i>399,342</i>
<i>Admin Office Carry Forward Ongoing Grants to PY19</i>	<i>(26,138)</i>
<i>Program Carry Forward Ongoing Grants to PY19</i>	<i>-</i>
<b>Total Carry Forward to PY19</b>	<b>373,205</b>

Pacific Mountain Workforce Development Council  
 Program Year 2019  
 July 1, 2019 - June 30, 2020  
 Preliminary Budget Comparison



	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total-PY19 Prelim	Total-PY18 Final Mod	Difference	Comments
<b>Budgeted Revenues:</b>									
<b>Workforce Innovation and Opportunity Act (WIOA) 'Formula' Grants</b>									
WIOA Admin Cost Pool (ACP)	-	-	-	15,000.00	860,296.35	875,296.35	831,738.82	43,557.53	
WIOA Adult	869,976.50	211,529.00	112,937.00	19,792.08	331,636.73	1,545,871.31	1,566,258.60	(20,387.29)	
WIOA Dislocated Worker	914,922.00	207,686.00	150,000.00	24,537.77	244,825.24	1,541,971.01	1,862,271.08	(320,300.07)	
WIOA Youth	917,883.30	-	148,363.00	16,878.17	195,061.07	1,278,185.54	1,462,537.89	(184,352.35)	
<i>Subtotal</i>	2,702,781.80	419,215.00	411,300.00	76,208.02	1,631,819.39	5,241,324.21	5,722,806.39	(481,482.18)	
<b>Competitive WIOA' Grants</b>									
Opioid Reduction (8/1/18-6/30/20)	1,621,245.97	-	-	-	162,047.19	1,783,293.16	2,400,000.00	(616,706.84)	
Career Connect WA (1/1/18-9/30/19)	323,945.00	-	62,210.00	-	75,835.69	461,990.69	955,086.61	(493,095.92)	
PY18 Rapid Response Increased Emp (7/1/18-6/30/20)	338,988.31	53,501.44	30,892.00	-	38,622.91	462,004.66	570,456.00	(108,451.34)	
Opioid Homeless (01/01/19-06/30/20)	-	-	-	-	-	715,500.00	715,500.00	-	
Camo2Commerce	-	-	-	-	-	-	1,570,538.16	(1,570,538.16)	
TAP-Healthcare	-	-	-	-	-	-	191,591.17	(191,591.17)	
PY17 Rapid Response	-	-	-	-	-	-	363,177.60	(363,177.60)	
<i>Subtotal</i>	2,284,179.28	53,501.44	93,102.00	-	276,505.79	3,422,788.51	6,766,349.54	(3,343,561.03)	
<b>Department of Commerce Grants</b>									
WorkFirst (Community Jobs) (7/1/18-6/30/19)	1,090,104.00	-	6,000.00	-	274,026.00	1,370,130.00	1,419,463.00	(49,333.00)	
<b>Department of Social &amp; Health Services Grants</b>									
Dept of Voc Rehabilitation -PreEmployment Skills (3/16/18-3/15/20)	260,128.00	-	-	-	33,052.00	293,180.00	466,667.53	(173,487.53)	
Juvenile Rehabilitation - My JOB (7/1/19-6/30/21)	975,000.00	-	-	-	325,000.00	1,300,000.00	1,374,369.00	(74,369.00)	
<i>Subtotal</i>	1,235,128.00	-	-	-	358,052.00	1,593,180.00	1,841,036.53	(247,856.53)	
<b>Other Grants</b>									
Thurston County Jail Program (1/1/19 - 12/31/19)	60,000.00	-	-	-	9,370.00	69,370.00	178,683.01	(109,313.01)	
Pierce County Career Day	-	-	30,000.00	-	2,000.00	32,000.00	31,025.00	975.00	
Dawkins Trust	-	-	37,000.00	-	-	37,000.00	42,336.61	(5,336.61)	
GH Foundation	110.00	-	-	-	-	110.00	1,556.59	(1,446.59)	
Healthcare Authority	10,000.00	-	-	-	-	10,000.00	10,000.00	-	
Boeing	141,844.38	-	-	-	8,076.02	149,920.40	150,000.00	(79.60)	
Saltchuk	3,937.51	-	-	-	-	3,937.51	4,900.89	(963.38)	
<i>Subtotal</i>	215,891.89	-	67,000.00	-	19,446.02	302,337.91	418,502.10	(116,164.19)	
<b>Total Revenue</b>	<b>7,528,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>2,559,849.20</b>	<b>11,929,760.63</b>	<b>16,168,157.56</b>	<b>(4,238,396.93)</b>	



**Budgeted Expenditures:**

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total-PY19 Prelim	Total-PY18 Final Mod	Difference	Comments
<b>Program Services</b>									
<i>WIOA Formula</i>									
<i>Adult Contracted Programs (Career Path Services)</i>	869,976.50	-	-	-	-	869,976.50	848,646.00	21,330.50	
<i>Dislocated Worker Contracted Programs (Career Path Services)</i>	853,515.00	-	-	-	-	853,515.00	1,020,934.00	(167,419.00)	
<i>Youth Contracted Programs (ResCare)</i>	917,883.30	-	-	-	-	917,883.30	1,000,524.41	(82,641.11)	
<i>Incumbent Worker Training (TBD)</i>	-	-	150,000.00	-	-	150,000.00	150,000.00	-	
<i>JBLM In-house Program</i>	61,407.00	-	-	-	-	61,407.00	-	61,407.00	
<i>Business Services (Thurston Co. Chamber)</i>	-	419,215.00	-	-	-	419,215.00	400,000.00	19,215.00	
<i>System Navigators-Triage, Outreach, UI support</i>	-	-	57,937.00	-	-	57,937.00	73,220.57	(15,283.57)	
<i>Work-Based Learning/Career Connections/AmeriCorps support</i>	-	-	98,363.00	-	-	98,363.00	100,000.00	(1,637.00)	
<i>High Impact Grants-Youth &amp; Young Adult</i>	-	-	70,000.00	-	-	70,000.00	76,856.00	(6,856.00)	
<i>Enhanced CTE Connections</i>	-	-	15,000.00	-	-	15,000.00	-	15,000.00	
<i>Open Lab</i>	-	-	20,000.00	-	-	20,000.00	-	20,000.00	
<i>Industry Cluster Study</i>	-	-	-	45,000.00	-	45,000.00	50,000.00	(5,000.00)	
<i>Outreach</i>	-	-	-	16,208.02	-	16,208.02	30,000.00	(13,791.98)	
<i>EDC Support</i>	-	-	-	15,000.00	-	15,000.00	-	15,000.00	
<i>Subtotal</i>	2,702,781.80	419,215.00	411,300.00	76,208.02	-	3,609,504.82	3,750,180.98	(140,676.16)	
<i>WIOA Competitive</i>									
<i>Opioid Use &amp; Reduction Response In-house</i>	778,668.63	-	-	-	-	778,668.63	993,653.00	(214,984.37)	
<i>Opioid Use &amp; Reduction Response Contracted (Choice)</i>	842,577.34	-	-	-	-	842,577.34	1,100,000.00	(257,422.66)	
<i>Opioid 2 Homeless In-house</i>	657,000.00	-	-	-	-	657,000.00	-	657,000.00	
<i>JBLM In-house Program (PY18 RRIE)</i>	293,988.31	-	-	-	-	293,988.31	1,529,753.36	(1,235,765.05)	
<i>C2C Contracted</i>	-	-	-	-	-	-	382,014.79	(382,014.79)	
<i>Career Connect In-house Program</i>	-	-	78,102.00	-	-	78,102.00	83,483.72	(5,381.72)	
<i>Career Connect WA (CPS, ResCare, AJAC, ESD113)</i>	323,945.00	-	-	-	-	323,945.00	751,933.36	(427,988.36)	
<i>High Impact Grants-CCL</i>	-	-	15,000.00	-	-	15,000.00	-	15,000.00	
<i>Rapid Response Increased Employment Contracted (CPS, TCC)</i>	45,000.00	53,501.44	-	-	-	98,501.44	332,111.02	(233,609.58)	
<i>TAP Healthcare Contracted</i>	-	-	-	-	-	-	191,512.10	(191,512.10)	
<i>Subtotal</i>	2,941,179.28	53,501.44	93,102.00	-	-	3,087,782.72	5,364,461.35	(2,276,678.63)	
<i>WorkFirst &amp; Other</i>									
<i>WorkFirst In-house Program Thurston, Mason, Lewis Co.</i>	1,090,104.00	-	6,000.00	-	-	1,096,104.00	1,232,124.34	(136,020.34)	
<i>Thurston County PREP Jail In house Program</i>	60,000.00	-	-	-	-	60,000.00	107,757.15	(47,757.15)	
<i>Pierce County Career Days</i>	-	-	30,000.00	-	-	30,000.00	29,000.00	1,000.00	
<i>Dawkins Trust</i>	-	-	37,000.00	-	-	37,000.00	17,336.61	19,663.39	
<i>DVR - Contracted</i>	260,128.00	-	-	-	-	260,128.00	179,563.00	80,565.00	
<i>JRA In-house Program</i>	975,000.00	-	-	-	-	975,000.00	1,104,369.00	(129,369.00)	
<i>JRA Contracted</i>	-	-	-	-	-	-	15,000.00	(15,000.00)	
<i>Grays Harbor Foundation</i>	110.00	-	-	-	-	110.00	1,556.59	(1,446.59)	
<i>Boeing</i>	141,844.38	-	-	-	-	141,844.38	141,052.08	792.30	
<i>Healthcare Authority</i>	10,000.00	-	-	-	-	10,000.00	-	10,000.00	
<i>Saltchuk</i>	3,937.51	-	-	-	-	3,937.51	4,900.89	(963.38)	
<i>Subtotal</i>	2,541,123.89	-	73,000.00	-	-	2,614,123.89	2,832,659.66	(218,535.77)	
<b>Program Expense Total</b>	<b>8,185,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>-</b>	<b>9,311,411.43</b>	<b>11,947,301.99</b>	<b>(2,635,890.56)</b>	

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc Contracts & Projects	Administrative Services	Total-PY19 Prelim	Total-PY18 Final Mod	Difference	Comments
<b>Administrative Services</b>									
<b>Administrative Office Operations</b>									
Salaries					1,195,059.82	1,195,059.82	980,969.05	214,090.77	
Benefits					501,704.16	501,704.16	398,677.64	103,026.52	
Travel & Training					64,000.00	64,000.00	63,100.00	900.00	
Professional Services					139,860.00	139,860.00	204,000.00	(64,140.00)	
Facilities					89,281.00	89,281.00	89,281.00	-	
Supplies & Communications					60,050.00	60,050.00	37,250.00	22,800.00	
Equip/Maintenance/Rentals					18,920.00	18,920.00	18,920.00	-	
Depreciation					8,310.00	8,310.00	8,310.00	-	
Insurance					20,000.00	20,000.00	20,000.00	-	
Memberships					16,479.00	16,479.00	15,770.00	709.00	
Board Community Outreach					20,000.00	20,000.00	20,000.00	-	
Community Outreach					10,000.00	10,000.00	10,000.00	-	
Misc					10,800.00	10,800.00	9,800.00	1,000.00	
Transfer to Unrestricted					(4,000.00)	(4,000.00)	(3,750.00)	(250.00)	
Admin Office Subtotal					2,150,463.98	2,150,463.98	1,872,327.69	278,136.29	
<b>Transition &amp; AJC Activities</b>									
Staffing					-	-	-	-	
Subcontracts					25,500.76	25,500.76	68,158.69	(42,657.93)	
Transition Subtotal					25,500.76	25,500.76	68,158.69	(42,657.93)	
<b>One Stop Operator</b>									
Staffing					-	-	-	-	
Subcontracts					128,459.98	128,459.98	125,000.00	3,459.98	
<b>Administrative Expense Total</b>					<b>2,304,424.72</b>	<b>2,304,424.72</b>	<b>2,065,486.38</b>	<b>238,938.34</b>	
<b>Total Expenditures</b>	<b>8,185,084.97</b>	<b>472,716.44</b>	<b>577,402.00</b>	<b>76,208.02</b>	<b>2,304,424.72</b>	<b>11,615,836.15</b>	<b>14,012,788.37</b>	<b>(2,396,952.22)</b>	

<i>Admin Office Formula Carry Forward to PY19</i>	<i>399,342</i>	<i>809,409</i>
<i>Admin Office Carry Forward Ongoing Grants to PY19</i>	<i>(26,138)</i>	<i>339,537</i>
<i>Program Carry Forward Ongoing Grants to PY19</i>	<i>-</i>	<i>239,000</i>
<b>Total Carry Forward to PY19</b>	<b>373,205</b>	<b>1,387,947</b>

# Agnes Balassa Solutions LLC

strategy | implementation | facilitation

MEMORANDUM

DATE: 6/5/19

TO: Cheryl Heywood, Chair, One-Stop Committee

FROM: Agnes Balassa, ABSLLC

RE: PacMtn WorkSource/AJC Site Certification Recommendations

Site certification provides an opportunity for the PacMtn WDC and region to determine how WorkSource sites are measuring up against the promise of the American Job Center Network – a seamless, fully integrated system that provides a robust menu of services to assure increased employment and a more vibrant economy. In spring 2019, a team reviewed materials and visited sites using a new certification tool designed to better integrate site certification with continuous improvement efforts.

Supported by Corrine Daffern, the review team consisted of

Scoring Reviewers	Additional Reviewers
Pam Grindstaff	Kelli Bloomstrom
Pete Lehmann	Bill Sullivan
Jacklyn Velasco	Diana Murphy
Agnes Balassa	Lee Childs

Through the certification process, the reviewers found that sites had progressed significantly in their efforts to increase integration and work as teams. Efforts to clarify who is responsible for what have resulted in increased collaboration across leadership from the various programs. Several promising new initiatives were recently launch, including a common business services model and training, a system wide effort to align and codify the work of welcoming, triaging, serving and connecting customer to employment, and the development of a common data dashboard. Co-enrollments, a key step in service integration, have increased and some new workshops have been developed based on customer needs. The system has added two navigators to help staff better connect services and to bring in additional resources and strategies for serving customers. System leadership has begun working in cross-site and cross functional teams, learning how to work as a system, rather than a collection of agencies.

The reviewers identified several themes from the certification materials and visits:

- Staff were generally enthusiastic about getting started with continuous improvement plans, and stated that they appreciated being part of the certification process. Despite confusion during the process and difficulty understanding some of the questions, staff appreciated being engaged and stated that they could now see the linkage between certification and continuous improvement efforts.

- Sites generally scored themselves low regarding their efforts to engage the voice of the customer to drive system improvements. Therefore, the review team recommends making next year the year of the customer. All initiatives should be driven by the needs of our customers and developed and evaluated with active customer input. The business services model and training that currently rolling out throughout the system is one example of how the customer voice can inform changes to operations. Grays Harbor’s new job seeker workshop and the Tapping into Hidden Talent workshop piloted by WorkSource Mason are two additional strong examples of using customer voice to guide how services are delivered.
- Communication was universally identified as a challenge. Somehow key information and messaging doesn’t always make it to front line staff, leaving them wondering why they are being asked to make changes. Additionally, staff recommendations for changes seem to get lost somewhere along the chain, making it hard for them to believe they really do have the power to recommend improvements. The end result is a lack of trust, a feeling of helplessness, and less of a willingness to step up and take on challenges. Efforts to address this issue are underway with the assistance of a Customer First project manager from ESD.
- Service integration has improved considerably and staff from various partners are spending more time working together on common issues and challenges. The review team recommends continued work on this front to fully integrate as many services and functions as possible. The Welcome, Triage, Connect initiative will help by building a common system-wide understanding of expectations for these functions so that any staff could assist.
- As a key component of service integration, sites are encouraged to expand their implementation of direct linkage referrals to be more than warm hand offs. WIOA requires that customers be connected to services not just referred. The system has clearly developed good relationships with partners and mechanism to make referrals more personal, which is a good start, but does not fully meet the intent of direct linkage referrals. Again, this issue could be addressed within the score of the Welcome, Triage, Connect project.
- As another component of service integration, sites are encouraged to continue efforts to fully integrate the business services model into all sites. Training is the first step. When all staff understand the key linkage between business and job seeker services and implement steps to make that match more effective and serve both customers, the system will be better able to deliver on its promises.
- Move beyond basic EEO compliance (i.e. physical accessibility and a closet or catalog of assistive devices) to greater use of software, apps, etc. and more staff trained to interact with customers with a variety of barriers to make sites welcoming to all those with barriers to employment. This includes expanding the focus of PacMtn ADA/accessibility audits and EEO staff training.

**Recommendations:**

- Certify all four sites with the expectation that they continue to work on continuous improvement plans specifically for voice of the customer and at least one other initiative for the next year.
- Make next year the year of the voice of the customer, and align all initiatives to maximize customer input and experiences as the drivers of innovations.
- Establish a formal process for continuous improvement planning between certification cycles. This process should consist of the development of plans during the first quarter after the certification, an annual touch base to see if progress is being made and updating of plans within the quarter following the touch base.

- Expand what is expected in terms of accessibility of sites, beyond basic EEO requirements to increased use of readily available adaptive technology, accessibility audits by those with barriers, etc.
- Continue to work on implementing integration, business services and direct linkage referrals.
- Update the certification document, based on the experience of those who completed it, adjust the certification process to rely less on written feedback from the sites, and sort out which criteria need to be addressed at a system level and which pertain directly to the sites. Staff were clear that they did not want a complete overhaul of the tool or process – they want to be able to measure their progress over time. However, the process of completing the tool was onerous and very time consuming; some tweaking may result in more efficient use of staff time while still obtaining necessary input.



## MEMORANDUM

TO: PacMtn Executive & Finance Committee

FROM: Corinne Daffern, Associate Director of Workforce Services

SUBJECT: PacMtn WorkSource Site Certification—Recommendation from One-Stop Review Committee

DATE: June 7, 2019

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### **Background**

Title I of WIOA requires the State Workforce Development Board (SWDB), in consultation with local Chief Elected Officials and Local Workforce Development Boards (LWDBs), to establish criteria and procedures to be used to evaluate and certify one-stop sites for effectiveness, including customer satisfaction, physical and programmatic accessibility, and continuous improvement. LWDBs must certify one-stop sites in order to receive one-stop infrastructure funds. In Washington, LWDBs certify three types of One-Stop sites: comprehensive sites, affiliated sites and connection sites. Application and review are required for each type. Connection Sites follow a different, more negotiated process based on the site itself, i.e. Timberland Regional Libraries

WorkSource sites are the portals to the national American Job Center network and its broad array of career services and resources. These services and resources are designed to help individuals acquire the skills necessary to gain meaningful employment and businesses access the talent pipeline that meets their human capital needs and fuels economic growth. Under WIOA, workforce partners share common performance goals and collaborate in developing and implementing a WorkSource delivery system where services are designed with the customer in the center, resources are leveraged for maximum efficiency, and continuous improvement is the hallmark. The One-Stop sites vary in services available, in accordance to the type and allowance for the specific needs of the region and the customers served.

This year's certification required thoughtful review and participation by partners who wanted to part of the PacMtn's local service delivery system. In spring 2019, a team reviewed materials and visited sites using a new certification tool designed to better integrate site certification with continuous improvement efforts. This is an intensive, time-consuming process and the reviewers each indicated they learned a lot about the system. This report, observations and recommendations are specific to the Comprehensive and Affiliate Centers. Because Connection Sites are not held to the same certification requirements as the others, we felt it best to hold off



and do updates at a later time. The process was a lot for the reviewers without adding those in as well. We will bring those back later in the summer.

Supported by Corinne Daffern, the review team members included: <b>Scoring Reviewers</b>	<b>Additional Reviewers</b>
Pam Grindstaff	Kelli Bloomstrom
Pete Lehmann	Bill Sullivan
Jacklyn Velasco	Diana Murphy
Agnes Balassa	Lee Childs

Through the certification process, the reviewers found that sites had progressed significantly in their efforts to increase integration and work as teams. Efforts to clarify who is responsible for what have resulted in increased collaboration across leadership from the various programs. Several promising new initiatives were recently launch, including a common business services model and training, a system wide effort to align and codify the work of welcoming, triaging, serving and connecting customer to employment, and the development of a common data dashboard. Co-enrollments, a key step in service integration, have increased and some new workshops have been developed based on customer needs. The system has added two navigators to help staff better connect services and to bring in additional resources and strategies for serving customers. System leadership has begun working in cross-site and cross-functional teams, learning how to work as a system, rather than a collection of agencies.

The reviewers identified several themes from the certification materials and visits:

- Staff were generally enthusiastic about getting started with continuous improvement plans, and stated that they appreciated being part of the certification process. Despite confusion during the process and difficulty understanding some of the questions, staff appreciated being engaged and stated that they could now see the linkage between certification and continuous improvement efforts.
- Sites generally scored themselves low regarding their efforts to engage the voice of the customer to drive system improvements. Therefore, the review team recommends making next year the year of the customer. All initiatives should be driven by the needs of our customers and developed and evaluated with active customer input. The business services model and training that currently rolling out throughout the system is one example of how the customer voice can inform changes to operations. Grays Harbor’s new job seeker



workshop and the Tapping into Hidden Talent workshop piloted by WorkSource Mason are two additional strong examples of using customer voice to guide how services are delivered.

- Communication was universally identified as a challenge. Somehow, key information and messaging doesn't always make it to front line staff, leaving them wondering why they are being asked to make changes. Additionally, staff recommendations for changes seem to get lost somewhere along the chain, making it hard for them to believe they really do have the power to recommend improvements. The result is a lack of trust, a feeling of helplessness, and less of a willingness to step up and take on challenges. Efforts to address this issue are underway with assistance from ESD's Customer First project manager.
- Service integration has improved considerably and staff from various partners are spending more time working together on common issues and challenges. The review team recommends continued work on this front to fully integrate as many services and functions as possible. The Welcome, Triage, Connect initiative will help by building a common system-wide understanding of expectations for these functions so that any staff could assist.
- As a key component of service integration, sites are encouraged to expand their implementation of direct linkage referrals to be more than warm hand offs. WIOA requires that customers be connected to services not just referred. The system has clearly developed good relationships with partners and mechanism to make referrals more personal, which is a good start, but does not fully meet the intent of direct linkage referrals. Again, this issue could be addressed within the score of the Welcome, Triage, Connect project.
- As another component of service integration, sites are encouraged to continue efforts to fully integrate the business services model into all sites. Training is the first step. When all staff understand the key linkage between business and job seeker services and implement steps to make that match more effective and serve both customers, the system will be better able to deliver on its promises.
- Move beyond basic EEO compliance (i.e. physical accessibility and a closet or catalog of assistive devices) to greater use of software, apps, etc. and more staff trained to interact with customers with a variety of barriers to make sites welcoming to all those with barriers to employment. This includes expanding the focus of PacMtn ADA/accessibility audits and EEO staff training.

### **Proposed Action**

The Certification Team proposes that all WorkSource Center, Affiliate and Connection sites be fully certified with the expectation that each site continue to work on continuous improvement plans specifically for voice of the customer, and at least one other initiative for the next year. The





One Stop Operations Committee has approved the Certification Team’s proposed action on 6/6/19.

**Next Steps and Recommended Motion**

Move to approve the One Stop Committee’s Recommendations to fully certify the following WorkSource Sites:

- WorkSource Center—Thurston County
- WorkSource Affiliate—Lewis County
- WorkSource Affiliate—Mason County
- WorkSource Affiliate—Grays Harbor County

All PacMtn WorkSource sites commit to work on continuous improvement as recommended by the Certification Review Team. Site leadership, at the direction of the WorkSource Operations Regional Collaborative, will identify actions and timelines to meet the request of the review committee. All Certification documents, including site scores, and reviewers comments can be reviewed by the Executive Finance Committee and PacMtn Board, as requested. Please contact Corinne Daffern for additional details on the scoring process.