



Executive Finance Committee Agenda

06/13/2024 ▪ 2:30-4:00p

Join online via Microsoft Teams

Meeting ID: 250 164 923 287

Passcode: GRU9cW

I. Welcome & Check-In Items

- A.** Introductions & Establish Quorum
- B. Action Item:** Motion to Approve February 8, 2024 EFC Minutes (Attachment #1)
- C.** Board Chair Comments
- D.** [CEO Report](#) (Attachment #2)

II. Discussion & Action Items:

- A. Discussion & Action Item:** PacMtn Policy #9300 – Community Reinvestment Fund Incentive (Attachment #3)
 - i. Action Item:** Motion to Approve PacMtn Policy #9300 and Recommend Do Pass to the WDC Board
- B. Discussion Item:** Regional Strategic WA Workforce Training and Coordinating Board Feedback (Attachment #4)
- C. Discussion Item:** WorkSource Leases

III. Fiscal Items:

- A. Discussion Item:** Financial and Single Audit Report PY22 (Attachment #5)
- B. Discussion Item:** PY22 Tax Form 990 (Attachment #6)
- C. Discussion Item:** PY24 Preliminary Budget (Attachment#7)
 - i. Action Item:** Motion to Approve PY24 Preliminary Budget and Recommend Do Pass to the WDC Board and Consortium

IV. Executive Session

The Board can move to close the meeting for select and appropriately limited conversation on matters best conducted in confidence including meeting with an auditor on sensitive financial issues, handling top-level personnel matters including the CEO's compensation and performance review, planning for an important transaction like a real estate deal or a merger, matters where "personal or organizational confidentiality is requested or prudent", dealing in a preliminary way (including investigation) with crisis situations or with allegations of improper conduct by the CEO or a board member – before disclosure to staff or others who ordinarily attend full board meetings. Any specific action requiring a vote will be taken in the public portion of the meeting.

There has been NO Executive Session requested at this time.



V. Committee & Task Force Updates (Committee Leads)

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

VI. Good of the Order & Announcements

Executive Finance Committee Members

Name	Business	County	Position
1. Michael Cade	Thurston Economic Development Council	Thurston	Board Chair
2. Dr. Lorie Thompson	Capital STEM Alliance	Regional	Vice Chair
3. Christina Riley	Labor and Apprenticeship Representative	Regional	Treasurer
4. Alissa Shay	Port of Grays Harbor	Grays Harbor	Incoming Chair
6. Cheryl Heywood	Timberland Regional Library	Regional	One Stop Committee Lead
7. Jonathan Pleger	Morningside	Regional	Targeted Populations Committee Co-Lead
9. Sharon Trask	Mason County Commissioner	Mason	Consortium Chair, Ex Officio
10. Vacant			ABEL Committee Lead
11. Derek Epps	Seattle Shellfish	Mason	Business At-Large
12. David Schaffert	Thurston County Chamber of Commerce	Thurston	BaSE Co-Lead

Workforce Development Speak (Commonly Used Acronyms)

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



PacMtn Board Member Values

**Customer needs are priority #1.
Innovate and be creative.**

**Ensure all counties are included.
Honor diverse perspectives.**

**In all things demonstrate: Integrity, honesty, transparency, personal excellence,
constructive self-assessment, continuous self-improvement, and mutual respect**

Duty of Attention= Full participation and Practical inquiry

Duty of Allegiance=Address conflict of interest & confidentiality, care about funding sources & potential opportunities

Duty of Agreement = abide by Federal, State & Local laws and PacMtn mission, vision, values, services, policies & programs

Board Member Reminders

Conflict of Interest: In accordance with the Workforce Innovation and Opportunity Act and the standards of honorable business practice. Workforce Development Council members (WDC), as well as members of WDC Committees and Task Forces, who directly represent, are employed by, or act as consultants to organizations or agencies having business before the Council shall not vote on any matter or issue regarding said organization or agency. Any member having a conflict of interest will declare the conflict prior to any discussion on the matter and must recuse themselves from any formal action related to the conflict.

Concern about misuse of public resources: PacMtn Board of Directors takes seriously all matters of fiscal integrity and the ethical and lawful conduct of its business. Any concerns about fraud, abuse or unethical conduct should be reported to a Board Officer, the CEO or the [State Auditor's Office \(SAO\)](#).



Executive Finance Committee Minutes

02/08/2024 ▪ 2:30 – 4:00p

PacMtn Offices & Online Via Microsoft Teams

Attendees: Michael Cade, Dr. Lorie Thompson, Alissa Shay, David Schaffert, Sharon Trask, Johnathan Pleger, Christina Riley, Derek Epps

Staff: William Westmoreland, Wil Yeager, Arissa De Lima, Dan Cooling, Christina Gorman, Melody Pajaro, Megan Fiess

Guests: Sean Wiley

I. Welcome & Check-In Items

A. Introductions & Establish Quorum

Michael Cade called the meeting to order at 2:36pm. Quorum established and self-introductions were made.

B. Action Item: Motion to Approve November 9, 2023 EFC Minutes

Sharon Trask motioned to Approve the November 9, 2023 EFC Minutes as presented. David Schaffert seconded. **Motion carries.**

C. Board Chair Comments

Michael showed appreciation to Alissa during her time as Board Chair and for creating an environment for meaningful conversation.

D. CEO Report

William shared highlights from his CEO report. For review of the CEO report please refer to our website www.pacmtn.org

II. Discussion and Action Items:

A. Discussion & Action Item: Board Member Nomination and Reappointment of Board Terms

Arissa De Lima reviewed current Board Member updates and vacancies.

i. **Action Item:** Motion to Approve Nominee and Recommended Do Pass to the WDC Board and Consortium

- Dr. Carli Schiffner, Grays Harbor College, President, 3 year term-Expiring June 30, 2026

Sharon Trask Motioned to Approve Nominee and Recommend Do Pass to the WDC Board and Consortium. Christina Riley Seconded. **Motion Carries.**

ii. **Action Item:** Motion to Approve Reappointment of Board Member's Term and

Recommend Do Pass to the WD Board and Consortium

- Jonathan Pleger, Morningside, CEO, 3 year term- Expiring June 30, 2026

*Sharon Trask Motioned to Approve Nominee and Recommend Do Pass to the WDC Board and Consortium. David Schaffert Seconded. **Motion Carries.***

B. Discussion & Action Item: Regional Strategic Plan

Megan reviewed the Regional Strategic Plan and public comments with the Board. Please refer to our website www.pacmtn.org for comments.

- iii. **Action Item:** Motion to Approve the Regional Strategic Plan Recommended Do Pass to the WDC Board

*Christina Riley Motioned to Approve the Regional Strategic Plan and Recommend Do Pass to the WDC Board. Lorie Thompson Seconded. **Motion Carries.***

C. Discussion Item: One Workforce System MOU/IFA

William leads the discussion reviewing the current standings of the MOU/IFA and next steps which include action will being taken at the next full WDC Board meeting.

III. Fiscal Items:

A. Discussion and Action Item: PY23 Q2- Quarterly Financial Statement

Melody reviewed the financial statements with the Board. Wil adds that the Fiscal Team will work on the presentation of the financials to the Board and tailor to the Board's needs.

Suggestions included a one page summary with performance included.

IV. Executive Session

No Executive Session at this time

V. Committee & Task Force Updates (Committee Leads)

- A.** One Stop Operations Committee – Committee has been working on the execution of the One Workforce System MOU/IFA as outlined in the meeting memo.
- B.** Priority Populations Committee – Committee has not met recently.
- C.** Adult Basic Education & Literacy (ABEL) – Committee has not met recently.
- D.** Business and Sector Engagement (BaSE) – Committee's next meeting will be used to visit a local business in the region with a briefing on leadership.

Good of the Order and Announcements

Michael Cade states he enjoyed his day spent at a conference with food producers with the Northwest Ag Center at Tumwater Craft District. He emphasized the need to establish a system where growers cater to the local community while ensuring their integration into the workforce system and amplifying their voices. Additionally, he extended appreciation to PacMtn for their contributions.

Meeting adjourned at 4:05p.

Submitted by: Arissa De Lima, Chief of Staff | WDC Board Liaison

Executive Finance Committee Members

Name	Business	County	Position
1. Michael Cade	Thurston Economic Development Council	Thurston	Board Chair
2. Dr. Lorie Thompson	Capital STEM Alliance	Regional	Vice Chair
3. Christina Riley	Labor and Apprenticeship Representative	Regional	Treasurer
4. Alissa Shay	Port of Grays Harbor	Grays Harbor	Incoming Chair
6. Cheryl Heywood	Timberland Regional Library	Regional	One Stop Committee Lead
7. Jonathan Pleger	Morningside	Regional	Targeted Populations Committee Co-Lead
9. Sharon Trask	Mason County Commissioner	Mason	Consortium Chair, Ex Officio
10. Vacant			ABEL Committee Lead
11. Derek Epps	Seattle Shellfish	Mason	Business At-Large
12. David Schaffert	Thurston County Chamber of Commerce	Thurston	BaSE Co-Lead

Workforce Development Speak (Commonly Used Acronyms)

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

PacMtn Board Member Values

**Customer needs are priority #1.
Innovate and be creative.**

**Ensure all counties are included.
Honor diverse perspectives.**

**In all things demonstrate: Integrity, honesty, transparency, personal excellence,
constructive self-assessment, continuous self-improvement, and mutual respect**

Duty of Attention= Full participation and Practical inquiry

Duty of Allegiance=Address conflict of interest & confidentiality, care about funding sources & potential opportunities

Duty of Agreement = abide by Federal, State & Local laws and PacMtn mission, vision, values, services, policies & programs

Board Member Reminders

Conflict of Interest: In accordance with the Workforce Innovation and Opportunity Act and the standards of honorable business practice. Workforce Development Council members (WDC), as well as members of WDC Committees and Task Forces, who directly represent, are employed by, or act as consultants to organizations or agencies having business before the Council shall not vote on any matter or issue regarding said organization or agency. Any member having a conflict of interest will declare the conflict prior to any discussion on the matter and must recuse themselves from any formal action related to the conflict.

Concern about misuse of public resources: PacMtn Board of Directors takes seriously all matters of fiscal integrity and the ethical and lawful conduct of its business. Any concerns about fraud, abuse or unethical conduct should be reported to a Board Officer, the CEO or the [State Auditor's Office \(SAO\)](#).

- **Contract season** is in full swing and the push is on to fully execute all contracts before the program year begins. The current plan is to renew with modification all title 1b contracts with the exception of the Youth fund – which will be in procurement in late May. Other contracts rolling over or expanding (EsCA Commerce specifically) will expand existing contracts. We will also be seeking support from the board to move ahead with a full WIOA procurement for PY25, which is necessary as we continue to refine our service strategy. The upcoming Youth procurement is intended to service as a “demonstration” opportunity for new partners to find space in and resources from our system. PacMtn has contracted with Capital STEM Alliance (CSA) to build an asset map of providers of youth services to help inform the upcoming youth RFP. During the demonstration period, new partners that are awarded will benefit from additional technical assistance and program support under the CSA contract. The goal is to build the capacity of regional partners to service youth under WIOA and EcSA. More news on the provider contracts can be found [here](#).
- PacMtn is excited to announce the addition of some new team members; **Matt Hanusa** (Director of Sector Strategies), **Terry Ziegler** (Accountant) and **Finance Williamson** (Accounting Specialist) recently joined our team. Both Harmoni and Terry are joining our accounting team, back filling an open position and expanding the team’s capacity to support our growing pool of funds. Matt’s role has been revised from previous iterations of the BaSE role, focusing on building sector strategies and expanding training capacity in the region – directly related key occupations employers continue to struggle to fill. Please join me in welcoming them our team!
- Our **4-year Local Plan** has been received and reviewed and forwarded by the state workforce board will be considered for action later in the month. We receive several feedback items, most of which were minor in nature. Ultimately and after some discussion, the plan was accepted. Included in this process is the **Certification of the PacMtn Board** as the local workforce board in Workforce Development Area 2. There has been a determination that 2 current members do not meet the requirements as defined in federal law. Though these positions have been filled in the same way for

some time now, it is likely that the county commissioners will need to appoint new members. More to come on these items as we learn more.

- As we approach PY24 and begin to operationalize our new local plan, staff and key partners plan to propose a **Big Hairy Audacious Goal or BHAG (pronounced bee-hag)** as a strategy to achieve our [3 primary objectives](#) established in the plan. A BHAG sets a compelling, long-term goal that is intriguing enough to inspire people to take action. BHAGs are meant to pull people out of the status quo and energize them to implement a big-picture-type plan that could take a longer time frame to complete. There are several types, and current conversations are leaning into a targeting model. Planning is also underway to change our outreach and marketing strategy to elevate key Career Pathways – those most important to fuel our local economy which in turn would produce more opportunity. Rather than focusing solely on self-directed approaches to career planning, especially as it relates to people experiencing a dislocation and youth transitioning into employment from education, an intentional campaign with the outcome in mind (filling key vacancies in the region) would increase the alignment between demand and opportunity. More conversations are planned over the summer leading into our fall retreat, at which point we hope to establish our BHAG.
- PacMtn recently worked with Parfait Bassalé to provide **Conflict Resolution Training** for WorkSource system partners and PacMtn staff. In coordination with the One-Stop Operator, system partners turned out in force and the training was a success. Partners shared positive feedback on Mr. Bassalé’s program content and more notably felt that the training strengthen our partnerships. This training sets the basis for his “Belonging Series” which PacMtn is considering continuing in PY24.

Stories of Hope and Impact

Shared from our partners at Equus:

“Participant came to WorkSource as a youth, interested in gaining skills and starting a new career, preferably in a demand field. He learned about the local labor markets as well as the Construction Cohort put on by ANEW and the Olympia Career Hub. He submitted a request and began enrolling into the Equus youth program. Training was from 1/22 – 2/16, where he got into good physical shape and earned 3 credentials (Flagger, Forklift and OSHA10). Following graduation he used his new certificates and renewed confidence to apply with Parr Lumber. Parr was excited to have the participant join their team where he builds trusses and is making more than he’s ever made, \$22/hr. He appreciates all the support he received from the Equus Team.”

“Participant came to us as a dislocated worker from his position in door-to-door work with Comcast. He had been unemployed for a while due to COVID terminating his position and needed training in order to find new work opportunities. He was able to enroll with us and join the CNC machine operator cohort in February. Since starting that class, the participant has learned a lot about CNC functions and has grown on the knowledge he had gained previously. Participant has through our programs found work with Rampage fabrication where he will be using those CNC machine skills. He started there as an OJT in April making \$35 an hour.”



MEMORANDUM

To: PacMtn Executive Finance Committee Members
From: William Westmoreland, CEO
Date: June 13, 2024
Subject: PacMtn WIOA Programs & Administrative Policies Approval Request

PacMtn updates policies or develops new local policies as needed to meet federal or state requirements and to best serve the system, our programs and of course, our customers. PacMtn ensures all policies are current and up to date so that staff, service providers and those we serve are well informed on the requirements of our work.

➤ **Local Program Policy – Implementation:**

Community Reinvestment Fund Incentive Policy

The attached policy previously established and titled as Community Reinvestment Fund Incentive Policy, has been created to provide guidance for eligibility to receive incentive payments associated with the Community Reinvestment Fund Program. Reviewed in detail and created accordingly to fully align with and incorporate all applicable new guidance within State Policy 7000 - State Guidance and Instructions for the State Economic Security for All (EcSA) Program, issued statewide March 13, 2024.

The policy as updated clearly articulates the details, expectations and allowances for Career Accelerator Incentives fund authorized the provision of financial support payments of \$1,000.00 per month to participants who are enrolled in the State EcSA program. To qualify for monthly incentive payments through the EcSA Career Accelerator, participants must first be eligible for and fully enrolled in the State EcSA program. They are also required to meet with their case manager/talent recruiter at least monthly to provide updates on the status of their career plan. These financial support incentives serve to recognize meaningful progress on participants' career plans, as noted and documented by their case manager/talent recruiter. This approach aims to incentivize participants to pursue training and work toward their customized self-sufficiency goals by acknowledging achievements and milestones.

All PacMtn Program Policies & Procedures are accessible for viewing on the PacMtn website and available upon request

www.pacmtn.org | Info@pacmtn.org

PacMtn WDC | 201 5th Ave Suite 401 Olympia WA 98501



Motion to Approve

Recommend Motion to Approve Community Reinvestment Funds Incentive Policy #9300 as presented with Recommendation of Do Pass for the full WDC Board.

References:

- [State Policy 7000](#) - State Guidance and Instructions for the State Economic Security for All (EcSA) Program
- PacMtn Policy 9300 - Community Reinvestment Fund Incentive (Attached)

All PacMtn Program Policies & Procedures are accessible for viewing on the PacMtn website and available upon request

www.pacmtn.org | Info@pacmtn.org

PacMtn WDC | 201 5th Ave Suite 401 Olympia WA 98501

TITLE: Community Reinvestment Funds Incentive Policy # 9300

Type: Program Policy

Date Established: 06/06/2024

Date Last Revised:

Date Posted to Website:

Status: Draft

Supersedes: N/A

Purpose

The Purpose of the Community Reinvestment Funds Incentive Policy is to foster sustainable economic development and enhance the well-being of underserved communities. This policy was established in response to Washington State establishing the Community Reinvestment Account to address racial, economic, and social disparities created by the historic design to focus on reducing poverty with a focus on equality.

Policy

The Career Accelerator Incentives fund authorized the provision of financial support payments of \$1,000.00 per month to participants who are enrolled in the State EcSA program. These incentives are provided to individuals who are actively receiving career development assistance and are making satisfactory progress in implementing the career plan developed with their case manager/talent recruiter at the time of enrollment. The aim is to assist them in securing suitable employment that provides a self-sufficient living wage.

Policy Guidelines

To qualify for monthly incentive payments through the EcSA Career Accelerator, participants must first be eligible for and fully enrolled in the State EcSA program. They are also required to meet with their case manager/talent recruiter at least monthly to provide updates on the status of their career plan. These financial support incentives serve to recognize meaningful progress on participants' career plans, as noted and documented by their case manager/talent recruiter. This approach aims to incentivize participants to pursue training and work toward their customized self-sufficiency goals by acknowledging achievements and milestones.

The initial enrollment into the Career Accelerator Incentive program occurs during a meeting with a financial coach, where participants complete the necessary forms and discuss any relevant tax implications and potential impacts on benefits. This meeting will serve as both enrollment into the program and the first qualifying activity.

Following enrollment, participants must continue to meet with case manager/talent recruiter monthly and present evidence of meaningful progress on their career path, as documented by their case manager/talent recruiter. Examples of meaningful progress include but not limited to the following:

- Beginning or enrolling in training or education pathways including Work Experience:** This indicates the initiation of steps towards skill development and career advancement.
- Credential Attainment and/or achieving measurable skills gains:** Attainment of recognized credentials or measurable improvement in skills reflects tangible progress in career development.

- Barrier Mitigation to employment:** Overcoming barriers, such as transportation issues, childcare, or language barriers, signifies overcoming obstacles to employment.
- Job Search Activities:** Documented efforts made in seeking employment opportunities.
- Employment attainment:** Securing employment signifies a significant milestone towards self-sufficiency. **after achieving employment, participants should complete a new UW Self-Sufficiency Calculator to reflect their updated individualized household income adequacy.*
- Employment Retention:** Maintaining employment demonstrates stability and resilience in the workforce.
- Wage Increase:** A wage increase indicates upward mobility and improved financial stability.
- Meeting with a financial advisor to establish a budget and plan for debt elimination and establishment of emergency fund:** Financial planning and debt management are crucial for long-term financial stability and self-sufficiency. ** Participants are recommended to schedule regular meetings with a financial advisor every 6 months throughout their program enrollment. These sessions aim to monitor both their career advancement and overall financial health, ensuring meaningful progress in both areas.*
- Reaching Self Sufficiency:** Achieving self-sufficiency represents the ultimate goal of the program, where participants no longer rely on external assistance for their basic needs.

Incentive payments may exclusively available to participants enrolled in the State ESA program and must be tracked in the Efforts to Outcome (ETO) system. Eligible participants are those who are actively progressing in their career plans, as developed with their Case Manager/talent recruiter.

Under the EcSA Career Accelerator, incentive payments amount to \$1,000.00 per month. There is no predetermined limit on the duration of incentive payments, provided the participant remains enrolled in the program and funding for the Career Accelerator program remains available.

Furthermore, within the EcSA program, Self-Sufficiency is defined as achieving 100% of individualized household income adequacy, as established through use of the [UW Self-Sufficiency Calculator](#).

Definitions

ETO- Efforts to Outcome

References

Workforce Innovation and Opportunity Act of 2014

WIOA Final Rule; 20 CFR Parts 676,677, and 678; Federal Register, Vol. 81, No. 161, August 19, 2016

WIOA Final Rule; 20 CFR Parts 603, 651, 652, et al; Federal Register, Vol. 81, No. 161, August 19, 2016

State Guidance and Instructions for the State Economic Security for All (EcSA) Program Policy #7000

WIN 0140 Community Reinvestment Fund

PacMtn Policy 9200P State EcSA Program Procedure

DATE APPROVED: TBD

Direct Inquiries to:

Pacific Mountain Workforce Development Council

201 5th Ave SW Se. 401, WA 98501

Telephone: (360) 515-5134

Email: Info@pacmtn.org

PacMtn is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities. WA Relay 711.



MEMORANDUM

To: PacMtn WDC Board of Directors

Subject: Regional Strategic WA Workforce Training and Coordinating Board Feedback

Date: 06/10/2024

Recommended Action:
No Action Requested

Background:

In 2023, PacMtn developed a Regional Strategic Workforce Plan for the next four years. This local plan will serve as a blueprint for shaping a successful future for the region’s workforce. The planning process is designed to assess the current landscape across the PacMtn region, identify opportunities, and set a clear direction for collective efforts. Our goal is to build a regional workforce development system that serves employers and jobseekers and strives to grow our economy by training workers for the jobs of tomorrow.

The local plan will serve as a guiding document that outlines priorities, objectives, and strategies for PacMtn over the next four years. It will provide a framework for decision-making, resource allocation, and collaboration across all PacMtn’s partners. By developing this plan, we can maximize the impact of our work and create sustainable pathways to prosperity for jobseekers and businesses alike.

The Washington State Workforce Training and Education Coordinating Board (WTECB) review is closed, evaluation has been recorded and revision to the plan has taken place. See the addendum to the packet shared on the screen for updates to the plan. The WTECB reviewers provided final input that indicated that they wanted additional updates to the Regional Service Delivery section specifically regarding Wagner-Peyser, we declined and fully sited WIOA Policy, Regulations, and Training and Education Guidance Letters that justify PacMtn’s One-Workforce approach.

Next Steps:

June 2024	Local plans approved by the Governor.
June 28, 2024	Local Chief Elected Officials and LWDBs notified by Workforce Board of Governor approval of their local plans (official correspondence to follow).

PacMtn’s mission is to lead dynamic regional workforce development that enhances economic success.



WTECB Review and PacMtn Response

Section	Reviewer Overview	Reviewer Comments	PacMtn Response
I. Regional Designation			
Workforce Region and LWDB Name	1. Clear and accurate	N/A	Update to Plan: Yes
	2. Unclear/needs clarification	Is the Chief Fiscal Agent the same as the Chief Elected Official, Sharon Trask? No board specifically listed and reference to the composition of the board is supposed to be in Appendix A but there is no Appendix A to this document. Please specifically list the official Name of the LWDB, Fiscal Agent Name, as we've had some confusion in areas where not all 3 names are the same and names of Board versus	Section I, Page 5 <ul style="list-style-type: none"> Original content included the Fiscal Agent Name, it was erroneously eliminated by our design team without consultation with staff. Fiscal Agent Name will be re-added to section Appendix A, Page 91 <ul style="list-style-type: none"> Board is listed

		workforce development areas have changed.	
II. Regional Component of Plan			
1. Regional Analysis	1. Meets expectations	N/A	Update to Plan: None
	2. Meets expectations	N/A	
2. Regional Sector Strategies	1. Minor update suggested	Plan states in 2012 PacMtn adopted TCISA plan (14 years past), but does not mention where this plan has been revisited, the 6 sectors are still in demand or whether data has informed updates or changes in priorities	Update to Plan: None Section II, Page 41 <ul style="list-style-type: none"> • Collaborative Approaches describes the process in which the board’s standing committee annually assess labor market information additionally the standing committee is chartered on a bi-annual basis in alignment with the 4-year local plan where they initiative a cluster study review every two years upon the mid-point of the local plan. • More information regarding cluster study reviews and updates are available on our website at https://pacmtn.org/about/reports-resources/ Section III, Page 63-67 <ul style="list-style-type: none"> • Sector strategies are detailed
	2. Minor update suggested	No evidence of specific sector strategies other than coordination with tribal nations	

			<ul style="list-style-type: none"> As required by WIOA the BaSE and board will review investment impact and will adjust strategies at the mid-point of the plan.
3. Regional Service Strategies	1. Major Concerns Identified	<ol style="list-style-type: none"> Regarding using library locations for customers to access WorkSource Services and connect with Title III staff but does not mention the ability for them to connect with WIOA Title I staff remotely through video or phone, if appropriate. Page 77 state, "in order to minimize referrals...the WP program must determine if an individual is unable to obtain 	<p>Update to Plan: Yes See section after this table</p> <ul style="list-style-type: none"> Local ESD leadership have reviewed and approve

		<p>employment through self-service or facilitated self-service before making a referral to I-B or other partners," suggest explaining this process.</p> <p>3. P. 80-81, review of TEGl 16-16 and WIOA Sec. 3(8) for clarity around 'case management' as the plan suggests this is not applicable for Title I or III. Case Management, per WIOA, is the term used to describe career planning and regular communication between enrollee</p>	
--	--	---	--

		and service provider.	
	2. Minor update suggested	Very general language without specifics.	
4. Coordination with Regional Economic Development Organizations	1. Meets Expectations	N/A	Update to plan: None Section I, Page 46
	2. Minor update suggested	This section contains general language but does not identify specific economic development efforts or coordination with the biggest industries such as hospital systems, manufacturing enterprises, etc.	<ul style="list-style-type: none"> In the PacMtn region board members and business association relationships are deeply leveraged. The BaSE coordinates convening demand sector leaders in alignment with their chartered committee work. Section III, Page 63-67 <ul style="list-style-type: none"> Sector strategies are detailed As required by WIOA the BaSE and board will review investment impact and will adjust strategies at the mid-point of the plan.
5. Coordination of Transportation/Other Support Services	1. Needs Further Detail	Suggest naming the transportation agencies in the local area and perhaps even a map (both to show the connections as well as	Update to plan: Yes Section II, Page 47 <ul style="list-style-type: none"> List local transportation authorities with a description of

		<p>limitations). Suggest describing any current local options for transportation assistance (i.e. local veteran services, TANF transportation assistance for WorkFirst enrollees, Dial-a-Ride services in the local area, WIOA Title-I transportation assistance to training, possible assistance for those just starting a job or work experience). Might be good place to expand on state EcSA Supportive Services.</p>	<p>their local service area. Describe whether service is no cost.</p> <ul style="list-style-type: none"> • Describe in more detail policy and advocacy work to support transportation authorities in moving to a no cost fare structure.
	<p>2. Needs Further Detail</p>	<p>Although the drafters do a good job of explaining the wide area of the local workforce region, they don't identify strategies to coordinate transportation.</p>	
<p>III. Local Component of Plan</p>			

1. Vision, Goals, and Strategies	1. Aligns with state priorities	N/A	Updates to plan: None
	2. Aligns with state priorities	N/A	
3. High-Performing Board Initiatives	1. Minor updates suggested	Suggest including information on board member orientation and ongoing education, if applicable.	Updates to plan: Yes Appendix A, Page 91 <ul style="list-style-type: none"> Add description of board member orientation and ongoing education, create reference in Section III, page 52
	2. Minor updates suggested	Needs specific plan or integration of Appendix A materials into this section.	
3. Regional Alignment	1. Minor updates suggested	Suggest including more detail on alignment with Federal and State EcSA program, as this is a new and expanding major source of funds.	Updates to plan: None <ul style="list-style-type: none"> In alignment with contractors, system, and staff we develop an annual plan that aligns all current strategic initiatives. These initiatives are braided, weaved, and leveraged in detail annually.
	2. Meets expectations	N/A	
4. Expanding Access and Inclusivity	1. Meets expectations	N/A	Updates to plan: None
	3. Meets expectations	N/A	
5. Education and Training Coordination	1. Meets expectations	N/A	Updates to plan: None Section II, Page 43-45
	2. Minor update suggested	I didn't see a specific description addressing the workforce gaps and	

		the specific steps to address the gaps.	<ul style="list-style-type: none"> Regional Service Strategies section outlines goals and strategies. <p>Section II, Page 60-63</p> <ul style="list-style-type: none"> Provides additional detail to
6. Career Pathways Development	1. Meets Expectations	N/A	<p>Updates to plan: No</p> <p>Section III, Page 60-61</p> <ul style="list-style-type: none"> Education Coordination describes partnering with Carl Perkins funded programs including Regional STEM Network, Registered Apprenticeship, and pre-apprenticeship. <p>Section III, Page 62-63</p> <ul style="list-style-type: none"> Career Pathways and Credentials describes partnering with CTE, Registered Apprenticeship, and pre-apprenticeship.
	2. Minor update suggested	Need to discuss integration with CTE or apprenticeship or pre-apprenticeship programs.	
7. Employer Engagement	1. Meets expectations	Suggest expanding on BaSE mission, efforts, actions and recommendations to full board and local strategies.	<p>Updates to plan: No</p> <p>Section III, Page 63-67</p> <ul style="list-style-type: none"> The board prefers to have this detail in the BaSE bi-annual charter that is aligned and drives

	2. Needs further detail	I saw minimal description or specifics regarding employer engagement.	<p>the plan. This allows leadership to adjust strategies annually if we are not achieving outcomes.</p> <p>Section III, Page 43-45</p> <ul style="list-style-type: none"> • Strategic details and Interventions outline more detail that drive the annual One-Workforce quality improvement plan.
8. One-Stop System	1. Needs further detail	Some concerns around the local strategy to have Title III WP staff complete full skills and barriers assessments prior to referral to partner programs, especially title I. Concerns that local strategy for referrals to social service partners FIRST, instead of alongside, Title I potentially sets up customer for longer period prior to enrollment in employment and training, thus longer time to work and self-	<p>Updates to plan: No</p> <p>See section after this table</p> <ul style="list-style-type: none"> • Local ESD leadership have reviewed and approve

		sufficiency. Description in plan is of of wrap around, common intake, however the process looks more like referrals and co-enrollments are discouraged.	
	2. Needs further detail	Not enough detail to assess success.	
9. Accessibility and Integration	1. Accessible and integrated services/strategies described	Explained accessibility and accommodation well.	Updates to plan: No
	2. Needs further detail	How does Timberland Regional Library connect job seekers? What information exists for job seekers to know of the existence of help at library locations? What training exists for those in the library locations?	
10. Technology and Innovation	1. Needs further detail	Ideas and vision around technology improvements are positive. Suggest including statement to the effect that technology	Updates to plan: No See section after this table

		and self-service do not replace, but only enhance, staff service delivery, whether in one-stop or remote.	
	2. Needs further detail	Efforts on working with regional broadband and digital equity could be expanded upon with specific steps.	
11. Partnerships and Collaborations	1. Effective partnerships/strategies described	N/A	Update to Plan: None
	2. Effective partnerships/strategies described & Needs further detail	Consider looking for ways partnership and collaboration is successful and then attempting to model that work. For example, consider the Lewis County Transit, Centralia College, and Centralia High School CTE success for examples (The Revet program)	
	1. Minor gaps identified	Suggest actually naming more of the local collaborative	Updates to plan: Yes Section III, Page 77

12. Supportive Services and Coordination		agencies/associations and more detail on how those collaborations leverage resources for the benefit of customers.	<ul style="list-style-type: none"> • Create reference to One-Workforce MOU and link to cooperative agreement section.
	2. Minor gaps identified	Programs are listed but little detail in terms of the frequency of contact and coordination and the measurable outcomes.	
Overall Impression	1. N/A	N/A	
	2. General Feedback	The plan is beautiful to look at and the demographics and industry sectors are detailed and informative, yet the next steps, specific paths and programs to be undertaken and the frequency of those interactions is missing. After the section of tribal nations and outreach to the disability community, there is little detail regarding efforts to help	

		incumbent job seekers connect with jobs or offering pathways to students other than a post-secondary education. What about connection to apprenticeships and pre-apprenticeships or specific outreach to employers and asking employers what skills they need in their anticipated workforce?	
Performance Accountability	1. Section identified	Detailed and addresses 4 points	Plan updates: None
	2. N/A	N/A	
Board Composition	1. Concern Noted	Submitted board membership attachment is out of date/does not align with website. Area of concern: LWDB is not following its own Interlocal Agreement with states "Appoint Workforce Development	Plan update: Yes <ul style="list-style-type: none"> • Update filled seats. • Concern regarding government econ dev organization and have started remedying.

		<p>Council members, at least three represented from each County, a majority to be representative of private business,”</p> <p>LWDB identifies 15 “business members” of which 4 are vacant; only 3 are private business reps and 2 are Chamber of Commerce employees (business organizations); 1 is a Port Commissioner, 1 is a municipality, 1 is a non-profit, and 3 are EcDeve members (of which are all non-profit associations or non-profit corporations per SOS and Revenue). While Policy 5610 allows for Ec Dev to serve as business members of the board, they must still be owner, CEO, COO, or other with policy making or hiring</p>	
--	--	--	--

		authority and provide employment including high quality working in in-demand sectors, and public EcDev members may not serve as business members (i.e. Port of Grays Harbor is registered as a municipality; question whether a Port Commissioner conforms to required authority for business member).	
Assurances			Plan Update: Yes <ul style="list-style-type: none"> Assurances will be included in final plan with CLEO signature

3. Regional Service Strategies

- 1. Regarding using library locations for customers to access WorkSource Services and connect with Title III staff but does not mention the ability for them to connect with WIOA Title I staff remotely through video or phone, if appropriate.**

The Timberland library locations in our region are connection sites. Per ESD policy, 1016, Revision 1 *Connection sites are self-service-only entry points designed to enhance and supplement customer access to information. This can be publicly*

available computer(s) with Internet access, the ability to connect to job search services, unemployment, online learning, skills development, etc.

Since Title I-B services in the PacMtn region are designated for customers who wish to pursue training, the determination of whether a participant needs training and cannot obtain employment through career services alone is made by a one-stop partner after an interview, evaluation, or assessment, and career planning (CFR 680.210). Basic Career Services such as *determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs* is not the function of a connection site staff member (CFR 678.430).

While there is not a sequence of service requirement for referral to training services, referrals to Title I come after a determination is made between a customer and a trained Title III or non-WIOA funded partner staff member. In the PacMtn region, referrals to Title I come from partners trained to conduct interviews, evaluation, or assessments and career planning. These partners consist of core/required partners from Title's II, III, IV and IV and other trained community- based partners. Library staff are trained in the online tools and resources to assist customers with their self-service employment needs and how to connect with one-stop partners for further assistance. Library staff are not expected to interview, evaluate, assess, or provide career planning services. After library staff connect customers to a one-stop partner, those trained partner staff determine the following according to CFR 680.210 *Who may receive training services?*

Under WIOA sec. 134(c)(3)(A) training services may be made available to employed and unemployed adults and dislocated workers who:

(a) A one-stop center or one-stop partner determines, after an interview, evaluation, or assessment, and career planning, are:

(1) Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;

(2) In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; and

(3) Have the skills and qualifications to participate successfully in training services;

As mentioned above, library staff at our connection sites are not expected to make referrals directly to Title I as it goes beyond the scope and capacity of their role in the system but instead are expected to connect a customer to a trained one-stop partner. After “an interview, evaluation, or assessment and career planning” by a trained partner to determine if a customer is a good fit for Title services, a referral is made to the Title I program. After a referral is made, Title I staff make the final determination regarding eligibility and need for training.

When partner staff do not make an initial determination of eligibility and need, Title I staff historically have gotten inundated with too many referrals that are not a good fit for Title I services. As a result, a large number of customers were denied enrollment into Title I, causing much frustration from partners and customers alike. Preventing library staff from referring directly to Title I prevents this problem from occurring.

2. **Page 77 state, “in order to minimize referrals...the WP program must determine if an individual is unable to obtain employment through self-service or facilitated self-service before making a referral to I-B or other partners,” suggest explaining this process.**

The paragraph referred to in your question is as follows:

To ensure seamless service delivery in the WorkSource system to minimize referrals and to ensure leveraging of resources between programs, the Wagner Peyser program must determine if an individual is unable to obtain employment through self-service or facilitated self-services before making a referral to Title I-B or any other partner or service provider.

PacMtn agrees this paragraph is incomplete. The paragraph should also include Wagner Peyser participant career services. With this inclusion the paragraph should read as follows:

To ensure seamless service delivery in the WorkSource system to minimize referrals and to ensure leveraging of resources between programs, the Wagner Peyser(WP) program must determine if an individual is unable to obtain employment through self-service, facilitated self-services, and WP participant career services before making a referral to Title I-B or any other partner or service provider.

In the original paragraph it could be assumed that customers should be referred to Title I-B after only engaging in services for reportable individuals (self-service or facilitated self-help). This eliminates a core function of our one-stop system where customers are served as participants in the Wagner Peyser program with basic and individualized career services. Based on historical data, most customers who engage in our system do obtain employment with WP career services only and do not require co-enrollment or a referral to Title I-B services.

The minimization of referrals depends on one-stop service providers understanding how to utilize partnerships strategically to reduce duplication of services and administrative activities in favor of a positive customer experience. In order to successfully meet the unique needs of individuals seeking services, one-stop staff need to understand what services are necessary to provide and when to help a customer become re-employed or gain additional skills to obtain a higher quality job.

Since WIOA has eliminated the sequence of services requirement under WIA, determinations as to what services, programs, or service providers will best meet a customer’s needs are now up to the discretion of program staff. Guidance on how to apply this discretion is provided by ESD in its Data Integrity and Performance Policy Handbook.

On page 9 of the handbook under Alignment of Wagner Peyser and WIOA Title I-B Services, it states the following:

The underlying principle of the one-stop system (WorkSource system) is coordination of programs, services and governance structures so job seekers have relatively seamless access to a system of federally funded workforce investment services. WIOA provides five categories of services: basic career services, individualized career services, training services, supportive services, and follow-up services.

Note: There is no requirement for participation in one type of service before proceeding to the next type. The intent of WIOA is to allow flexibility based on each individual customer's assessed needs.

Based on the above policy guidance, "flexibility is based on each individual customer's assessed needs." So, the question regarding process depends on an assessment. On page 10 of the Data Integrity and Performance Policy Handbook, the importance of an assessment is mentioned again after staff understand the point at which a basic career service requires more significant staff involvement:

Basic career services may be informational (self-services and staff-assisted services), but it is important for staff to understand the point at which a basic career service requires more significant staff involvement. This determination can be based on assessment results of the participant's inability to obtain employment through self-service alone.

Further on page 10 of the handbook it describes the purpose of an assessment:

Significant staff involvement includes staff assessment of an individual's skills, education, or career objectives in order to assist with any of the following:

- *Determination of appropriate next steps in the search for employment, training, and related services, including job referral;*
- *Assessment of personal barriers to employment; or*
- *Access to other services necessary to enhance employability and individual employment-related needs.*

To fully understand the process outlined in ESD's handbook it is important to recognize the difference between customers and their unique needs.

Reportable individuals are those customers with employment needs that can be met through self-service or facilitated self-help utilizing readily available information that does not require an assessment by a staff member. These customers are not counted in our performance measures.

Wagner Peyser participants are customers who require a staff assessment of an individual's skills, education, or career objectives in order to determine next steps. Based on this assessment, staff may determine a customer can obtain employment with basic and individualized career services provided by WP staff.

As part of an assessment of personal barriers, staff may determine it is appropriate to make a Referral to Additional Services after identifying that a job seeker has additional barriers to employment that basic and individualized career services cannot

address. A referral to additional services often will result in a referral to a human/social service provider best equipped to mitigate a customer's indirect or additional barriers to employment.

Determining a customer's need for training and a referral to Title I-B services is informed by CFR 680.210 Who may receive training services:

Under WIOA sec. 134(c)(3)(A) training services may be made available to employed and unemployed adults and dislocated workers who:

(a) A one-stop center or one-stop partner determines, after an interview, evaluation, or assessment, and career planning, are:

(1) Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services;

(2) In need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment; and

(3) Have the skills and qualifications to participate successfully in training services;

(b) Select a program of training services that is directly linked to the employment opportunities in the local area or the planning region, or in another area to which the individuals are willing to commute or relocate;

(c) Are unable to obtain grant assistance from other sources to pay the costs of such training, including such sources as State-funded training funds, Trade Adjustment Assistance (TAA), and Federal Pell Grants established under title IV of the Higher Education Act of 1965, or require WIOA assistance in addition to other sources of grant assistance, including Federal Pell Grants (provisions relating to fund coordination are found at § 680.230 and WIOA sec.

134(c)(3)(B)); and

(d) If training services are provided through the adult funding stream, are determined eligible in accordance with the State and local priority system in effect for adults under WIOA sec. 134(c)(3)(E) and § 680.600.

If, after an assessment, it is initially determined a customer is unlikely to obtain employment, in need of training services, and has the skills and qualifications to participate successfully in training services, a customer is likely a candidate for Title I-B services. As part of the determination process, WP staff are expected to assist customers likely to be referred to Title I to select a pathway and occupational choice as well as assess customer aptitudes and abilities. These services are outlined under CFR 678.430 in the following Basic Career Services:

(1) Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs

(3) Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive services needs;

(4)(A) Provision of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA)

(5) Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs

(7) Provision of performance information and program cost information on eligible providers of education, training, and workforce services by program and type of providers

3. P. 80-81, review of TEGL 16-16 and WIOA Sec. 3(8) for clarity around ‘case management’ as the plan suggests this is not applicable for Title I or III. Case Management, per WIOA, is the term used to describe career planning and regular communication between enrollee and service provider.

While the term case management is used in TEGL 16-16, PacMtn prefers to use language such as career services and career planning to emphasize the purpose of our work with customers. The following DOL definition of career planning describes the work we do:

CAREER PLANNING (WIOA sec. 3(8)) – means the provision of a client-centered approach in the delivery of services, designed-

(A) To prepare and coordinate comprehensive employment plans, such as service strategies, for participants to ensure access to necessary workforce investment activities and supportive services, using, where feasible, computer-based technologies; and

(B) To provide job, education, and career counseling, as appropriate during program participation and after job placement.

Using the term “case management” synonymously with career planning or career services unfortunately gets misinterpreted by some staff who liken themselves to social workers rather than employment specialists. Due to this common misinterpretation the term case management, as intended by TEGL 16-16, does not hold the same meaning as career planning or career services.

The actual practice of case management as describes by The American Case Management Association (ACMA) and the Commission for Case Manager Certification (CCMC) in the definition below aligns with the work of a workforce professional:

Case Management is a dynamic process that assesses, plans, implements, coordinates, monitors, and evaluates to improve outcomes, experiences, and value.

The misalignment in practice, however, is when staff devote the majority of their efforts on trying to mitigate barriers better performed by social and human services professionals rather than concentrate their efforts on re-employment. In the case of Title I services, barrier removal often becomes the priority; obtaining employment and following up on newly hired exited participants is neglected. When reviewing case loads from the past, it was not uncommon to see 70% or more of Title I-B participants being served in the workforce preparation stage referred to by the provider as “life skills.” The remaining

percentage were often still identifying a career pathway and very few were in training services or actually seeking employment.

Further compounding this problem was the high percentage of supportive services funds being spent on individuals in the “life skills” stage justified as necessary to enable an individual to participate in activities authorized under WIOA sec. 134(c)(2) and (3). Because providers saw themselves as “case managers” through the lens of a social service professional, few referrals were made to actual social service providers because in an ironic twist this was viewed as duplication of services they were already being provided.

Based on communications with other workforce development areas around the state, PacMtn was not unique in our previous interpretation of “case management.” Prioritizing barrier removal as employment specialists’ results in fewer referrals to system partners better equipped to mitigate indirect barriers to employment and results in duplication of services. This practice does not align with the vision of WIOA.

WIOA emphasizes the importance of operating as a seamless system of integrated partners. TEN 13-20 Advancing a One Workforce Vision and Strategy describes this vision:

The passage of WIOA offered an opportunity to modernize and establish a workforce system that is customer-centered: where the needs of businesses and workers drive workforce solutions; and where AJCs meet customers’ needs in a holistic way that leverages the resources and expertise of all of the workforce system partners. Achieving these goals requires strong partnerships throughout and across the workforce, education, and social services systems at both the state and local levels.

The WIOA vision is to “meet customers’ needs in a holistic way that leverages the resources and expertise of all of the workforce system partners.” When terms like “case management” become the primary way staff view their work, they often lose focus of the actual purpose of our work which is to re-employ individuals and retain them with the same employer for 12 months or more. This is more than a semantics issue when in practice we duplicate services rather than leverage the resources and expertise of all workforce system partners. The value-add function to existing system services gets lost. As a result, employment specialists spend a disproportionate amount of time and resources on the front end of the work rather than the back end.

This practice and the negative impact it has on our system performance measures cannot be overstated. Mitigating barriers and preparing participants to be work-ready are important functions of our system. Where that work occurs and by whom are questions already answered embedded in WIOA’s emphasis on leveraging the resources and expertise of all workforce partners, including social services systems. Connecting customers to service providers who can best meet individual’s immediate indirect barrier needs and concentrating more of our resources on direct employment needs is how we add value to the system by being employment experts rather than attempting to meet all the holistic needs of a customer with just Title I or III services alone.

PacMtn recognizes the term “case management” is often used interchangeably with career planning by the Department of Labor and ESD. However, it is not a term PacMtn chooses to use to describe our work due to the historical misinterpretation of “case management” in practice. PacMtn does not believe we are alone in eliminating the social service philosophy of case management from our practice. An example of the shift towards an emphasis on training and re-employment from primarily prioritizing indirect barriers to employment is perhaps best signaled by the House passage of H.R. 6655, A Stronger Workforce for America Act.

8. One Stop System

- 1. Some concerns around the local strategy to have Title III WP staff complete full skills and barriers assessments prior to referral to partner programs, especially title I. Concerns that local strategy for referrals to social service partners FIRST, instead of alongside, Title I potentially sets up customer for longer period prior to enrollment in employment and training, thus longer time to work and self-sufficiency. Description in plan is of wrap around, common intake, however the process looks more like referrals and co-enrollments are discouraged.**

Co-enrollment and referrals to Title I services are encouraged; however, there are initial steps that are required before an enrollment and/or referral is made by a system partner. Partners are required by WIOA to consider all the resources and service providers in the system to identify the most appropriate next steps to meet customer needs. In the past, this initial determination was expected to come from Title I staff. As a result, Title I staff would spend much of their time and resources doing intakes, assessments, and referrals to additional services. As many as 50% or more of the customers referred were regularly determined not be eligible or in need of Title I services. This practice, as mentioned in an earlier response, was inefficient and frustrating for all partners, including job seekers.

While Title I staff make the final determination regarding eligibility and need for Title I services, they are not expected to make the initial determination. This approach is supported by the services listed under Basic Career Services in CFR 678.430 which are the primary responsibility of Title III WP staff:

(a) Basic career services must be made available and, at a minimum, must include the following services, as consistent with allowable program activities and Federal cost principles:

(1) Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;

(2) Outreach, intake (including worker profiling), and orientation to information and other services available through the one-stop delivery system.

(5) Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, when appropriate, other workforce development programs

Language that states, “*other services available through the one-stop delivery system*” and “*Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system*” include more than just the Title I program.

Further, language from CFR 680.220(a) *Are there particular career services an individual must receive before receiving training services under the Workforce Innovation and Opportunity Act?* states,

(a) Yes, except as provided by paragraph (b) of this section, an individual must at a minimum receive either an interview, evaluation, or assessment, and career planning or any other method through which the one-stop center or partner can obtain enough information to make an eligibility determination to be determined eligible for training services under WIOA sec. 134(c)(3)(A)(i) and § 680.210. Where appropriate, a recent interview, evaluation, or assessment, may be used for the assessment purpose.

CFR 680.220 states that at minimum an interview, evaluation, or assessment and career planning must occur before a determination of eligibility for training services can be made. These interviews, evaluation or assessments do not need to come only from Title I but rather are part of the referral process.

CFR 680.222(b) states the following:

(b) The case file must contain a determination of need for training services under § 680.210 as determined through the interview, evaluation, or assessment, and career planning informed by local labor market information and training provider performance information, or through any other career service received. There is no requirement that career services be provided as a condition to receipt of training services; however, if career services are not provided before training, the Local WDB must document the circumstances that justified its determination to provide training without first providing the services described in paragraph (a) of this section.

The section that says, “*if career services are not provided before training, the Local WDB must document the circumstances that justified its determination to provide training without first providing the services described in paragraph (a) of this section.*”

Career services are not required before a referral for training; however, if career services are not provided this must be justified. Justification requires at minimum an interview, evaluation, or assessment and career planning which requires a partner to make an initial determination of eligibility and need. In short, one-stop partners make the initial determination, not Title I. Title I makes the final determination.

The initial assessment of need is further supported by language in *ESD’s Data Integrity and Performance Policy Handbook* as part of Policy 1020. See the following from the handbook:

Basic career services may be informational (self-services and staff-assisted services), but it is important for staff to understand the point at which a basic career service requires more significant staff involvement. This determination can be based on assessment results of the participant's inability to obtain employment through self-service alone (pg. 10)

A significant staff-assisted service is any assistance provided by staff beyond the informational services (i.e., readily available information) described above, regardless of the length of time involved in providing such assistance).

Significant staff involvement includes staff assessment of an individual's skills, education, or career objectives in order to assist with any of the following (pg. 10-11):

- Determination of appropriate next steps in the search for employment, training, and related services, including job referral;*
- Assessment of personal barriers to employment; or*
- Access to other services necessary to enhance employability and individual employment-related needs.*

The determination of “*appropriate next steps, assessment of personal barriers, and access to other services*” is made by Title III WP staff. Not only is this in ESD's own policy it is supported by the services outlined under WIOA Basic Career Services. Basic Career Services is the function of WP staff as mentioned above.

We cannot see where it states in our plan where “*local strategy for referrals to social service partners FIRST, instead of alongside, Title I*” is stated?” As documented above, Title I is not expected to be the default for every customer with barriers to employment. The one-stop system includes many more partners than just Title III and Title I. CFR 680.910 clearly states we should account for “*other programs providing such services*” like supportive services.

680.910 When may supportive services be provided to participants?

(a) Supportive services may only be provided to individuals who are:

- (1) Participating in career or training services as defined in WIOA secs. 134(c)(2) and (3); and*
- (2) Unable to obtain supportive services through other programs providing such services.*

(b) Supportive services only may be provided when they are necessary to enable individuals to participate in career service or training activities.

Since PacMtn has decided Title I services are reserved for customers only in training services, customers in need of supportive services to participate solely in career services is not applicable to our Title I program model. Pre-employment or pre-training preparation and barrier mitigation is a shared function with all system partners and non-WIOA funded service providers. Utilizing all system partners and community-based organizations to support customer needs reduces duplication of services and emphasizes coordination of value-added services that enhance and complement existing services.

The notion of service coordination amongst one-stop partners and other community service providers is referred to in CFR 680.900. The challenges job seekers face prior to employment and/or training might be grouped into two categories:

Direct barriers: refer to those impediments to employment such as job history, experience, or skills capacity, as well those challenges that address the means to access and means to employment (e.g., lack of or a poorly written resume or limited knowledge of where to find job opportunities).

Indirect barriers: are suggestive of those areas that hinder a job seeker that are external to the workplace (e.g., transportation, internet access, poor housing), as well as specific individual challenges related to social, family or support (e.g., lack of dependent care, health concerns, substance use, legal issues).

Direct barriers to employment are challenges WorkSource one-stop partners are well equipped to help mitigate for customers. Indirect barriers, on the other hand, often fall beyond the scope and capacity of Title III and Title I and should result in practicing the “no wrong door” approach by quickly connecting these barriered customers to service providers best equipped to mitigate their indirect barriers to employment or training to stabilize them before “pushing” them onto an employer before they are ready or into training where they likely will not complete.

In some cases, to meet Title I programmatic requirements in the PacMtn region, one-stop partners may determine a customer will benefit more from stabilization services from another system partner before pursuing employment and/or training. Stabilization services are provided by human/social service organizations best equipped to address a customer’s physiological and safety needs. In the ESD services catalog this referral (32) is a *Referral to Additional Services* described in the definition below:

Referral to services available from other WorkSource partners or community services, beyond Basic Career Services. This referral identifies that the seeker has additional barriers to employment that Basic Career Services cannot address.

Referral to Additional Services does not prevent co-enrollment into multiple programs or prevent Title I to support a customer alongside another service provider, but it does clearly differentiate those customers with significant barriers to employment from those who would otherwise be referred to *WIOA Services – service catalog (35)* alone.

Limiting enrollment in Title I to only those customers deemed prepared and ready to successfully complete training aligns with WIOA sec. 134(c)(3)(A)(3) which states an individual must, *“Have the skills and qualifications to participate successfully in training services.”* Skills include soft skills, competency, aptitude, mental, and physical ability. Prepared and ready does not imply a customer does not face any barriers or is not in

10. Technology and Innovation

Ideas and vision around technology improvements are positive. Suggest including statement to the effect that technology and self-service do not replace, but only enhance, staff service delivery, whether in one-stop or remote.

The question seems to suggest staff assisted service is the primary way to assist customers. This disregards the fact that the Department of Labor expects State agencies providing labor exchange services to use each of the three-tiered service delivery strategies (i.e., self-service, facilitated self-help, and staff assisted services) intended to respond to differing service needs and differing service populations (CFR 652.207).

The Department of Labor states the following:

To continue to meet customer needs for labor exchange services in a period of diminishing resources, States operating Employment Security, One-Stop, and Workforce Development programs have devised a variety of approaches and service delivery models which are significantly different from the traditional model of an "Unemployment" office that provided one-on-one staff-intensive interviews and individualized assistance to job seekers in finding jobs. This model, as the sole means delivery of labor exchange, is now largely extinct.

The use of technology and facilitated self-help are not just enhancements but important service delivery modes that alleviate pressure on staff to provide individual staff assisted service to every customer.

TEGL 19-16 also makes clear the importance of self-service and informational services in the following:

The ES program provides vital self-service and informational services which would result in the ES program having a high percentage of reportable individuals. Even though these individuals are not included in the performance accountability calculations, ETA strongly supports these services and other services which can be provided virtually. ETA also notes that individuals may also receive virtual services and virtual career planning that demonstrate sufficient interaction or engagement with the system to be considered participants.

When feedback suggests, “the effect that technology and self-service do not replace, but only enhance, staff service delivery” it is clear the feedback team isn’t aware of DOL’s position on the important role technology, self-service, and facilitated self-help are to serve customers in a variety of ways to meet the actual needs of our customers.

DOL states the three-tiers of service should not be interpreted as a preference for one strategy over another but it does make clear each has a necessary and appropriate role in labor exchange service delivery. If the State preferences one strategy over

another and sees technology and self-service as only enhancements to staff assisted services, they are missing key service delivery strategies to expand capacity beyond one-on-one assistance.

As mentioned earlier, according to CFR 652.207 *How does a State meet the requirement for universal access to Employment Service services?* the following are not just enhancements but strategies to be deployed intentionally.

The State must have the capacity to deliver labor exchange services to employers and job seekers, as described in the Wagner-Peyser Act, on a statewide basis through:

(i) Self-service, including virtual services;

It is important to recognize many customers want their problems solved promptly and, in some cases, feel that searching for the answer themselves is quicker than subjecting themselves to a full-service approach requiring additional information, unnecessary administrative steps, and a formal assessment. Furthermore, self-service improves customer knowledge, as it allows them to resolve problems at their speed and learn as much or as little as they want.

(ii) Facilitated self-help service; and

Facilitated Self-Service is a service delivery method that occurs when staff assists an individual with accessing readily available information that does not require an assessment by the staff member of the participant's skills, education, or career objectives. This includes workforce information and information only self-services. An individual who only receives this level of services is a reportable individual who is excluded from the performance measures.

Facilitated self-help is an approach that gives a customer the freedom to take charge of their employment search and benefit from online resources to assess interest, improve readiness skills, and make informed decisions. In this approach, customers benefit from staff expertise and enhance the use of technology and self-help experience. Rather than use of technology to enhance staff assistance the opposite is true in this service delivery mode.

(iii) Staff-assisted service;

When labor exchange services use all three tiers of service delivery expected by DOL, staff assisted services are reserved for customers most in need. It is impractical, unnecessary, and inefficient to intend to provide significant staff assistance to every customer. Providing one-on-one staff assistance to every customer, as mentioned earlier, is considered by DOL to be a

traditional practice that is extinct. Therefore, considering the use of technology and self-service to only be enhancements to staff assisted services is an outdated recommendation that neglects recent guidance from DOL.

Funding and staff capacity are limited. In recognition of this fact, DOL considers the use of technology, self-service and facilitated self-help as ways to expand the capacity of the system beyond the limits of the available staff resources, thereby efficiently handling a wide variety of customer labor market and employment information needs. In some cases, the solution implemented across some workforce development areas is to duplicate basic career services with Title I staff. This is not a requirement, places too many resources at the front of the system, and negatively impacts performance outcomes due the imbalance of resources distributed across the system.



MEMORANDUM

To: Executive Finance Committee and PacMtn Board

Date: June 13, 2024

Subject: Sigle Audit for PY22

Per 2 CFR 200.51 A Non-Federal entity that expends \$750,000 or more during the non-Federal entity's fiscal year in Federal awards must have a single or program-specific audit conducted for that year in accordance with the provisions of this part.

Additionally, PacMtn receives a financial statement audit for the same period.

PacMtn Fiscal Year ended June 2023 was audited in accordance with the federal requirement and the report is available for viewing on the PacMtn website under [Reports and Resources](#), as well as the Federal Audit Clearing house website (<https://www.fac.gov>).

PacMtn received an unmodified opinion on its financial statements and an unmodified opinion on the Council's compliance with the requirements applicable to each of its major federal programs.



MEMORANDUM

To: Executive Finance Committee and PacMtn Board

Date: June 13, 2024

Subject: Tax Form 990

May 15, 2024 was the extended due date for PacMtn's 990 filing for Program Year 22 ending June 2023.

As prescribed by IRS rules regarding Form 990 section B policies and PacMtn policy, PacMtn provides to all voting members of the Board a copy of our final Form 990 (including required schedules) either electronically or in paper. This was sent electronically on May 15, 2024. A copy of the filing can be found on our website (www.pacmtn.org) under the [Reports and Resources](#) page.

Additionally, PacMtn as a part of our policy, when able, provides to the Executive Finance Committee (EFC) an opportunity for review and comment prior to filing. With our next EFC meeting scheduled for June 13, 2024, we were not able to have it reviewed prior to our filing but will have it available for comment at that time.



MEMORANDUM

To: PacMtn Executive Finance Committee Members

From: William Westmoreland, CEO
Wil Yeager, CFO

Date: June 13th 2024

Subject: PY24 Preliminary Budget

The PY24 Preliminary Budget begins services for the **Program Year (PY) beginning July 1, 2024, through June 30, 2025**. The attached budget documents offer a summary of the budget expected to provide needed services for the upcoming year. This version of the budget provides us with a starting point for an operational budget to begin the 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 earmarked with details to be developed at a later date.

The attached summary offers a breakdown of both revenues and expenses in the categories the Board is familiar with seeing.

Revenue Projections

Our revenue forecast for **PY24 is \$14,814,683**. This is a **\$1.2M Decrease** from PY23 final MOD budget. Additionally, expenses are expected to exceed **PY23 Final Budget Mod by \$162K**.

There reason for the decrease in funding is the sunsetting of funding streams that ended in PY23 in the amount of **2.6M**. However, unused program funding and grants that continue into PY24 have kept us in a competitive position. While we begin the PY24 program year lower than the final PY23 budget, we are **4M** dollars higher than where we started PY23.

Things to know about our revenue:



building community prosperity

1. WIOA formula funding to Washington State, the Governor released his discretionary dollars and sent them out to the State Work Force Boards (WDB's), additionally PacMtn received a larger allocation of funding this year under the Federal Formula Calculation in the amount of **908K** dollars over last year.
2. **7.5M** in funding carries over from the prior year and
3. PacMtn has continued to aggressively pursue additional funding to support the needs in our communities.

New Grants: Revenue Changes

WIOA Formula funding – PacMtn received a **\$908K** increase in funding and we are estimating carryforward dollars from PY23 unspent of **1.7M** which brings our total WIOA preliminary budget to **\$6.6M**.

Economic Security for All funds (EcSA) FEDERAL funding in the amount of **(\$449,103+)**, these funds **ARE** WIOA formula funds, and are designed to serve participants below 200% of the FPL and eligibility and fund use must follow WIOA rules.

We received two allotments of funding PY23 and PY24 funds.

Continuing Specialty Grants Fund Work

Economic Security for All funds (EcSA) STATE Above and Below 200% - in the amount of **(\$686,468+)**, these are state funds and less restrictive in their use compared to WIOA. Much of this funding will flow directly to participant investments. These funds are designed to serve participants that are working on self-sufficiency. Self Sufficiency is defined as attainment of 100% of their Income Adequacy Goal as established through use of the UW Self-Sufficiency Calculator.

Economic Security for All funds (EcSA) STATE Business Navigators - in the amount of **(\$108,333)**. These state funds are used to increase business navigator staff to support industry recovery and growth. The goal is to increase employer access to talent being developed in the WorkSource system, increase on the job training (OJT) and apprenticeships, and to expand career pathways options across the state.



building community prosperity

Community reinvestment funding – Carried forward in PY24 in the amount of **(\$2,500,000+)** for incentives and **(\$1,200,000+)** business services. The community reinvestment account—state appropriation is provided solely for the department (Department of Commerce) to distribute grants for economic development, civil and criminal legal assistance, community-based violence intervention and prevention services, and reentry services programs. Grants must be distributed in accordance with the recommendations of the community reinvestment plan developed pursuant to section 128(134), chapter 297, Laws of 2022 (ESSB 5693). The legislator has approved 200M as a state appropriation.

PacMtn was originally awarded in late PY23 **\$3,019,354** for incentive payments and **\$1,348,158** in funding to support business services.

Military Transition – Community Project Grant – PacMtn was awarded **\$1.5M** dollars to be used to support efforts working with the Military through our WorkEx Program. This funding, while included in the revenue forecast, will not be available for programing until approximately January of 2024. We will program expenses associated with the funding on the next available budget for the board.

QUEST DWG – Adjusted funds carried forward from PY24 in the amount of **(\$45,000)**. This is the best estimate as we work with the community projects that received this funding to complete their contracts.

These funds are used to **coordinate outreach** to recruit eligible participants with a focus on those whose employment has been negatively impacted by COVID-19, including to BIPOC communities, rural communities, people with disabilities, and underserved communities. **Engage with local and regional businesses** to help find the workers they seek and implement new and/or **strengthen local and regional sector partnerships** to inform local, tailored sector strategies to provide opportunities for participants to train for, or translate their existing skills into, high-quality jobs.

PacMtn Originally awarded 3 applications for use of the funds.

Opioid Disaster NDWG – Adjusted funds carried forward from PY23 in the amount of **(\$207,000)**.



building community prosperity

This is a continuation of a grant that will need to be completed by September of 2024. We are working on conducting several training cohorts in the follow areas: Broadband Boring, HCA Training, and OJT Placement.

Ag Labor – Adjust funds carried forward from PY23 in the amount of **(\$320,162)**. These are American Rescue Plan Act (ARPA) funds from Thurston County. The purpose of these funds is to work with Washington State University Extension (WSU) to administer the Agriculture Sector Recovery Program.

\$310,000 of the budget is to be spent on OJT contracts with employers to cost reimburse them for employees working in this sector.

Pathway Home (3) – Adjusted funds carried forward from PY23 in the amount of **(\$1,003,626)**.

We are in the third year of a 3.5-year grant from the Department of Labor that began July 1, 2022. The program dollars focused on the reintegration of ex-offenders. This grant represents an opportunity for future year-over-year funding as we demonstrate success.

Prep Program – Funds in the amount of **(\$127,547.50)**, this contract continues for another 5-year grant.

Under contract to the Thurston County Jail PacMtn will continue provision of services for County residents in work release and in County supervision. The **PREP Program** is well received by individuals and Jail Command who recognize it as helpful to the economic, health and welfare recovery of individuals. This program is a cornerstone activity for PacMtn’s Re-Entry Services body of work that builds upon and expands services provided through the opioid reduction grants.

In summary - in addition to providing critical services these **competitive grants** play an important role in picking up portions of staff time, overhead and administration that helps share the burden with our WIOA Formula base grants.

Our current blend of funding:

WIOA Formula Grants Reflects	45.0%
Competitive Grants DOL Grants	21.9%



building community prosperity

State EcSA	5.4%
Department of Commerce (Including poverty reduction funding)	24.7%
Other Misc. Grants	3.0%

PacMtn continues to diversify our funding streams and pursue additional funding.

Expenses

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. In the Budget Summary, these services are identified as either Direct Participant Services, Business Solutions, Special Impact Projects, Misc. Contracts & Projects or Administrative Services. Our emphasis is on providing services that reach and add value for our customers-both job seekers and employers.

As noted in the Summary Chart Administrative Services stand at around 27.7% of total planned expenditures. Even though we are requesting an increase in staff costs for a COLA and performance increases and bonuses for staff we have lowered our administration from 32.2%.

Full Time Equivalency (FTE) changes in number and nature are reflected in the chart below.

	(FTE) Total	Direct Services	Administrative
PY24	23	3	20
PY23	23	3	20
PY22	19	1	18
PY21	31	8	23
PY20	35	19	16

The rest of the Administrative Budget is steady state. Please note these additional administrative proposed budget changes:

1. At the end of PY23 PacMtn increase staffing to support both programming and administrative work for the organization. This staffing includes an IT position that will end in August.



building community prosperity

2. PacMtn Proposes a COLA of 3%, or 47K, merit 25K, and budget bonuses for end of year approximately 54K.

Critical Investments: New or Continuing

- **PacMtn One-Stop Operator and Operations-- \$150K.** PacMtn's One Stop Operator cost 150K. Under the IFA PacMtn is able to bill partners for 60K of the costs, lowering the total costs to 90K.
- Additionally there is **10K** budgeted to support professional development to continue the expansion of integrated service delivery of the region. Most of this funding is to drive system performance through communications, problem solving, project oversight and system training for the operation of the system. We additionally include funds for training and related support.

Recommending 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 that:

- Approves the PY24 Preliminary Budget, as presented or revised by the Executive Finance Committee.
- Directs staff to make final preparations for the full Board Discussion June 20, 2024 and the Consortium review and vote June 27, 2024.



PY 24 Revenues - \$14,814,082

WIOA Formula Grants
\$6,667,036

Admin Cost Pool
\$760,357

Adult \$2,040,191

Dislocated Worker
\$1,91,200

Youth \$2,175,288

45.0%

WIOA Competitive Grants
\$3,248,967

Opioid Disaster
\$207,000

Pathways Home
\$1,003,626

Quest DWG
\$45,736

Economic Security for All
Fed \$449,147

Military Transition - Com-
munity Project 1,500,000

21.9%

State EcSA \$794,801

Economic Security for All
\$686,468 Self Sufficient

Economic Security for All
\$108,333 Business Nav.

5.4%

Dept of Commerce Grants
\$3,656,169

EcSA- Participant
2,507,354

EcSA - Business Ser-
vices 1,148,815

24.7%

Other, State, Local Funding
\$447,109

Thurston County
Jail - \$126,947

Ag Labor -
\$320,163

3.0%

PY 24 Expenses - \$11,944,553

Direct Participant Services

- Adult/DW/Youth
- Community Youth

\$6,021,533

- Commerce Partici-
pant Services

50.4%

Business Solutions

- Business Services
- Military Transition

\$2,050,000

- Commerce Sector En-
gagement

17.2%

Special Impact Projects

- Commerce Regional By
and For partner Develop-
ment

\$310,000

- Quest Contracts

2.6%

Misc. Contracts

- Youth
- Sector Facilitation
- 2100

\$260,000

- Commerce Regional
Engagement

2.2%

Administrative Services

- Admin Office Operations
- Media Story Teller

\$3,303,019

- System Partner facili-
ties rent

27.7%

Pacific Mountain Workforce Development Council
Program Year 2024
July 1, 2024 - June 30, 2025
Preliminary Budget



	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total
Budgeted Revenues:						
<u>Workforce Innovation and Opportunity Act (WIOA) Formula Grants</u>						
WIOA Admin Cost Pool (ACP)	-	-	-	-	760,357.14	760,357.14
WIOA Adult	840,000.00	350,000.00	-	75,000.00	775,190.74	2,040,190.74
WIOA Dislocated Worker	430,000.00	450,000.00	-	75,000.00	736,200.41	1,691,200.41
WIOA Youth	805,000.00	400,000.00	-	100,000.00	870,287.61	2,175,287.61
<i>Subtotal</i>	2,075,000.00	1,200,000.00	-	250,000.00	3,142,035.91	6,667,035.91
<u>Competitive DOL/WIOA Grants</u>						
Opioid Disaster NDWG (03/01/2022-09/30/23) 2nd Half	187,000.00	-	-	-	20,000.00	207,000.00
Pathway Home (07/01/22-12/31/2025)	715,295.00	-	-	-	288,331.31	1,003,626.31
Quest DWG (10/01/22-09/30/24)	-	-	10,000.00	-	35,736.53	45,736.53
Economic Security for All (EcSA) Federal PY22	22,000.00	-	-	-	21,500.00	43,500.00
Economic Security for All (EcSA) Federal PY23	99,000.00	-	-	-	128,108.00	227,108.00
Economic Security for All (EcSA) Federal PY24	125,000.00	-	-	-	96,995.73	221,995.73
Military Transition - Community Project Grant	954,000.00	-	-	-	546,000.00	1,500,000.00
<i>Subtotal</i>	2,102,295.00	-	10,000.00	-	1,136,671.57	3,248,966.57
<u>State EcSA</u>						
Economic Security for All (EcSA)	466,468.00	-	-	-	220,000.00	686,468.00
Economic Security for All (EcSA) State Business Nav	-	-	-	-	108,333.00	108,333.00
<i>Subtotal</i>	466,468.00	-	-	-	328,333.00	794,801.00
<u>Department of Commerce Grants</u>						
Community Development Block Grant (CDBG)	-	-	-	-	-	-
Commerce EcSA - Participant Services	-	-	-	-	-	-
In House Commerce Incentives	1,949,000.00	-	300,000.00	-	258,354.00	2,507,354.00
Commerce EcSA - Sector Engagement	-	850,000.00	-	-	298,815.44	1,148,815.44
<i>Subtotal</i>	1,949,000.00	850,000.00	300,000.00	-	557,169.44	3,656,169.44
<u>Other Grants</u>						
Thurston Job Champions Network (Ends 10/31/23)	-	-	-	-	-	-
City of Olympia Journey to Jobs (Ends 12/31/23)	-	-	-	-	-	-
Thurston County Jail Program	126,946.82	-	-	-	-	126,946.82
Boeing	-	-	-	-	-	-
TST Community Grant (Ends 12/31/2023)	-	-	-	-	-	-
Lift (Lightweight Innovations for Tomorrow) (05/01/2022 - 09/30/2023)	-	-	-	-	-	-
Ag Labor (02/14/2023-12/31/2024)	310,000.00	-	-	-	10,162.82	320,162.82
<i>Subtotal</i>	436,946.82	-	-	-	10,162.82	447,109.64
Total Revenue	7,029,709.82	2,050,000.00	310,000.00	250,000.00	5,174,372.74	14,814,082.56

Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total
-----------------------------	-------------------------------	-------------------------	----------------------------	-------------------------	-------

Budgeted Expenditures:

Program Services	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total
WIOA Formula						
<i>Contracted Programs: Adult</i>	800,000.00	-	-	-	-	800,000.00
<i>Dislocated Worker</i>	400,000.00	-	-	-	-	400,000.00
<i>Youth</i>	100,000.00	-	-	25,000.00	-	125,000.00
<i>Community Youth Projects</i>	675,000.00	-	-	-	-	675,000.00
<i>Youth Training and internships</i>	-	-	-	-	-	-
<i>Incumbent Worker Training</i>	-	-	-	-	-	-
<i>Business Services / Including Military Transition</i>	-	1,200,000.00	-	-	-	1,200,000.00
<i>Apprentice Connections</i>	-	-	-	-	-	-
<i>Sector Facilitation/Media/Web Support</i>	-	-	-	225,000.00	-	225,000.00
<i>One Stop Operator / Professional Development</i>	90,000.00	-	-	10,000.00	-	100,000.00
<i>Subtotal</i>	2,065,000.00	1,200,000.00	-	260,000.00	-	3,525,000.00
Competitive DOL / WIOA Grants						
<i>Opioid Disaster NDWG (03/01/2022-09/30/23) 2nd Half</i>	187,000.00	-	-	-	-	187,000.00
<i>Pathway Home (07/01/22-12/31/2025)</i>	671,118.58	-	-	-	-	671,118.58
<i>Quest DWG (10/01/22-09/30/24)</i>	-	-	10,000.00	-	-	10,000.00
<i>Economic Security for All (EcSA) Federal PY22</i>	22,000.00	-	-	-	-	22,000.00
<i>Economic Security for All (EcSA) Federal PY23</i>	99,000.00	-	-	-	-	99,000.00
<i>Economic Security for All (EcSA) Federal PY24</i>	125,000.00	-	-	-	-	125,000.00
<i>Military Transition - Community Project Grant</i>	-	-	-	-	-	-
<i>Subtotal</i>	1,104,118.58	-	10,000.00	-	-	1,114,118.58
State EcSA						
<i>Economic Security for All (EcSA)</i>	466,468.00	-	-	-	-	466,468.00
<i>Economic Security for All (EcSA) State Business Nav</i>	-	-	-	-	-	-
<i>Subtotal</i>	466,468.00	-	-	-	-	466,468.00
Department of Commerce Grants						
<i>Community Development Block Grant (CDBG)</i>	-	-	-	-	-	-
<i>Commerce EcSA - Participant Services</i>	1,949,000.00	-	300,000.00	-	-	2,249,000.00
<i>Commerce EcSA - Sector Engagement</i>	-	850,000.00	-	-	-	850,000.00
<i>Subtotal</i>	1,949,000.00	850,000.00	300,000.00	-	-	3,099,000.00
Other Grants						
<i>Thurston Job Champions Network (Ends 10/31/23)</i>	-	-	-	-	-	-
<i>City of Olympia Journey to Jobs (Ends 12/31/23)</i>	-	-	-	-	-	-
<i>Thurston County Jail Program</i>	126,946.82	-	-	-	-	126,946.82
<i>Boeing</i>	-	-	-	-	-	-
<i>TST Community Grant (Ends 12/31/2023)</i>	-	-	-	-	-	-
<i>Lift (Lightweight Innovations for Tomorrow) (05/01/2022 - 09/30/2023)</i>	-	-	-	-	-	-
<i>Ag Labor (02/14/2023-12/31/2024)</i>	310,000.00	-	-	-	-	310,000.00
<i>Subtotal</i>	436,946.82	-	-	-	-	436,946.82
Program Expense Total	6,021,533.41	2,050,000.00	310,000.00	260,000.00	-	8,641,533.41

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total
Administrative Services						
Administrative Office Operations						
Salaries					1,653,981.25	1,653,981.25
Benefits					690,135.51	690,135.51
Travel & Training					140,052.51	140,052.51
Professional Services					317,616.51	317,616.51
Facilities					202,545.64	202,545.64
Supplies & Communications					42,796.00	42,796.00
Equip/Maintenance/Rentals					7,500.00	7,500.00
Depreciation					-	-
Insurance					11,161.99	11,161.99
Memberships					18,730.00	18,730.00
Misc.					108,000.00	108,000.00
Admin Office Subtotal					3,192,519.41	3,192,519.41
Other Activities						
Sector Strategies and LMI					-	-
Local Plan					-	-
System Rent Support					60,000.00	60,000.00
Media					48,000.00	48,000.00
HR Consulting (Employee Retention)					2,500.00	2,500.00
Launch Pad Scope					-	-
Other Subtotal					110,500.00	110,500.00
One Stop Operator						
One Stop Operator Subtotal					-	-
Administrative Expense Total					3,303,019.41	3,303,019.41
Total Expenditures	6,021,533.41	2,050,000.00	310,000.00	260,000.00	3,303,019.41	11,944,552.82

<i>Admin Office Formula Carry Forward to PY25</i>	<i>1,072,487</i>
<i>Admin Office Carry Forward Ongoing Grants to PY25</i>	<i>798,866</i>
<i>Program Carry Forward Ongoing Grants to PY25</i>	<i>998,176</i>
<i>Total Carry Forward to PY25</i>	<i>2,869,530</i>

Pacific Mountain Workforce Development Council
Program Year 2024
July 1, 2024 - June 30, 2025
Preliminary Budget



	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total-PY24 Prelim	Total-PY23 MOD	Difference	Comments
--	-----------------------------	-------------------------------	-------------------------	----------------------------	-------------------------	-------------------	----------------	------------	----------

Budgeted Revenues:

Workforce Innovation and Opportunity Act (WIOA) Formula Grants

WIOA Admin Cost Pool (ACP)	-	-	-	-	760,357.14	760,357.14	542,906.97	217,450.17	Increase in PacMtn Funding
WIOA Adult	840,000.00	350,000.00	-	75,000.00	775,190.74	2,040,190.74	1,434,696.77	605,493.97	Increase in PacMtn Funding
WIOA Dislocated Worker	430,000.00	450,000.00	-	75,000.00	736,200.41	1,691,200.41	1,696,797.31	(5,596.90)	
WIOA Youth	805,000.00	400,000.00	-	100,000.00	870,287.61	2,175,287.61	1,692,127.18	483,160.43	Increase in PacMtn Funding
Subtotal	2,075,000.00	1,200,000.00	-	250,000.00	3,142,035.91	6,667,035.91	5,366,528.23	1,300,507.68	

Competitive DOL/WIOA Grants

Opioid Disaster NDWG (03/01/2022-09/30/23) 2nd Half	187,000.00	-	-	-	20,000.00	207,000.00	711,603.46	(504,603.46)	Program Ending
Pathway Home (07/01/22-12/31/2025)	715,295.00	-	-	-	288,331.31	1,003,626.31	594,916.00	408,710.31	Estimate to begin program year
Quest DWG (10/01/22-09/30/24)	-	-	10,000.00	-	35,736.53	45,736.53	979,478.53	(933,742.00)	Program Ending
Economic Security for All (EcSA) Federal PY22	22,000.00	-	-	-	21,500.00	43,500.00	354,945.00	(311,445.00)	Program Ending
Economic Security for All (EcSA) Federal PY23	99,000.00	-	-	-	128,108.00	227,108.00	-	227,108.00	New Program
Economic Security for All (EcSA) Federal PY24	125,000.00	-	-	-	96,995.73	221,995.73	-	221,995.73	New Program
Military Transition - Community Project Grant	954,000.00	-	-	-	546,000.00	1,500,000.00	1,500,000.00	-	
Subtotal	2,102,295.00	-	10,000.00	-	1,136,671.57	3,248,966.57	4,140,942.99	(891,976.42)	

State EcSA

Economic Security for All (EcSA)	466,468.00	-	-	-	220,000.00	686,468.00	593,651.00	92,817.00	Renewal of funding
Economic Security for All (EcSA) State Business Nav	-	-	-	-	108,333.00	108,333.00	108,333.00	-	Renewal of funding
Subtotal	466,468.00	-	-	-	328,333.00	794,801.00	701,984.00	92,817.00	

Department of Commerce Grants

Community Development Block Grant (CDBG)	-	-	-	-	-	-	164,777.86	(164,777.86)	Program Ended
Commerce EcSA - Participant Services	-	-	-	-	-	-	-	-	
In House Commerce Incentives	1,949,000.00	-	300,000.00	-	258,354.00	2,507,354.00	3,019,354.00	(512,000.00)	Funds spent in PY23 on Participants
Commerce EcSA - Sector Engagement	-	850,000.00	-	-	298,815.44	1,148,815.44	1,348,158.00	(199,342.56)	Business services funds spent
Subtotal	1,949,000.00	850,000.00	300,000.00	-	557,169.44	3,656,169.44	4,532,289.86	(876,120.42)	

Other Grants

Thurston Job Champions Network (Ends 10/31/23)	-	-	-	-	-	-	227,276.59	(227,276.59)	Program Ended
City of Olympia Journey to Jobs (Ends 12/31/23)	-	-	-	-	-	-	132,836.24	(132,836.24)	Program Ended
Thurston County Jail Program	126,946.82	-	-	-	-	126,946.82	196,778.82	(69,832.00)	Change in Accounting
Boeing	-	-	-	-	-	-	100,000.00	(100,000.00)	Did not compete for funds
TST Community Grant (Ends 12/31/2023)	-	-	-	-	-	-	71,041.23	(71,041.23)	Program Ended
Lift (Lightweight Innovations for Tomorrow) (05/01/2022 - 09/30/2023)	-	-	-	-	-	-	54,460.09	(54,460.09)	Program Ended
Ag Labor (02/14/2023-12/31/2024)	310,000.00	-	-	-	10,162.82	320,162.82	493,196.48	(173,033.66)	Amount spent in PY23
Subtotal	436,946.82	-	-	-	10,162.82	447,109.64	1,275,589.45	(828,479.81)	

Total Revenue	7,029,709.82	2,050,000.00	310,000.00	250,000.00	5,174,372.74	14,814,082.56	16,017,334.53	(1,203,251.97)	
----------------------	---------------------	---------------------	-------------------	-------------------	---------------------	----------------------	----------------------	-----------------------	--

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total-PY24 Prelim	Total-PY23 MOD	Difference	Comments
--	-----------------------------	-------------------------------	-------------------------	----------------------------	-------------------------	-------------------	----------------	------------	----------

Budgeted Expenditures:

Program Services	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total-PY24 Prelim	Total-PY23 MOD	Difference	
WIOA Formula									
<i>Contracted Programs: Adult</i>	800,000.00	-	-	-	-	800,000.00	575,000.00	225,000.00	
<i>Dislocated Worker</i>	400,000.00	-	-	-	-	400,000.00	425,000.00	(25,000.00)	
<i>Youth</i>	100,000.00	-	-	25,000.00	-	125,000.00	825,000.00	(700,000.00)	Moving Funds from Contractor to community
<i>Community Youth Projects</i>	675,000.00	-	-	-	-	675,000.00	-	675,000.00	Community Youth Funding
<i>Youth Training and Internships</i>	-	-	-	-	-	-	30,000.00	(30,000.00)	Project ended
<i>Incumbent Worker Training</i>	-	-	-	-	-	-	100,000.00	(100,000.00)	Project ended
<i>Business Services / Including Military Transition</i>	-	1,200,000.00	-	-	-	1,200,000.00	599,759.00	600,241.00	Investing in Project 2100
<i>Apprentice Connections</i>	-	-	-	-	-	-	15,000.00	(15,000.00)	
<i>Sector Facilitation/Media/Web Support</i>	-	-	-	225,000.00	-	225,000.00	4,194.00	220,806.00	Sector Convening
<i>One Stop Operator / Professional Development</i>	90,000.00	-	-	10,000.00	-	100,000.00	10,000.00	90,000.00	Moved OSO From PacMtn Admin
<i>Subtotal</i>	2,065,000.00	1,200,000.00	-	260,000.00	-	3,525,000.00	2,583,953.00	941,047.00	
Competitive DOL/WIOA Grants									
<i>Opioid Disaster NDWG (03/01/2022-09/30/23) 2nd Half</i>	187,000.00	-	-	-	-	187,000.00	567,796.48	(380,796.48)	Ending of the program
<i>Pathway Home (07/01/22-12/31/2025)</i>	671,118.58	-	-	-	-	671,118.58	589,953.46	81,165.12	
<i>Quest DWG (10/01/22-09/30/24)</i>	-	-	10,000.00	-	-	10,000.00	642,835.00	(632,835.00)	Ending of the program
<i>Economic Security for All (EcSA) Federal PY22</i>	22,000.00	-	-	-	-	22,000.00	255,000.00	(233,000.00)	Final spending for program
<i>Economic Security for All (EcSA) Federal PY23</i>	99,000.00	-	-	-	-	99,000.00	-	99,000.00	New funding
<i>Economic Security for All (EcSA) Federal PY24</i>	125,000.00	-	-	-	-	125,000.00	-	125,000.00	New funding
<i>Military Transition - Community Project Grant</i>	-	-	-	-	-	-	-	-	Have programed work
<i>Subtotal</i>	1,104,118.58	-	10,000.00	-	-	1,114,118.58	2,055,584.94	(941,466.36)	
State EcSA									
<i>Economic Security for All (EcSA)</i>	466,468.00	-	-	-	-	466,468.00	416,384.00	50,084.00	Continuation of funding
<i>Economic Security for All (EcSA) State Business Nav</i>	-	-	-	-	-	-	-	-	Cost accounted for in Admin costs
<i>Subtotal</i>	466,468.00	-	-	-	-	466,468.00	416,384.00	50,084.00	
<i>Department of Commerce Grants</i>									
<i>Community Development Block Grant (CDBG)</i>	-	-	-	-	-	-	99,103.45	(99,103.45)	End of Program
<i>Commerce EcSA - Participant Services</i>	1,949,000.00	-	300,000.00	-	-	2,249,000.00	99,000.00	2,150,000.00	Estimated expenditure in PY24
<i>Commerce EcSA - Sector Engagement</i>	-	850,000.00	-	-	-	850,000.00	103,571.00	746,429.00	Estimated expenditure in PY24
<i>Subtotal</i>	1,949,000.00	850,000.00	300,000.00	-	-	3,099,000.00	301,674.45	2,797,325.55	
Other Grants									
<i>Thurston Job Champions Network (Ends 10/31/23)</i>	-	-	-	-	-	-	168,715.79	(168,715.79)	end of program
<i>City of Olympia Journey to Jobs (Ends 12/31/23)</i>	-	-	-	-	-	-	108,316.19	(108,316.19)	end of program
<i>Thurston County Jail Program</i>	126,946.82	-	-	-	-	126,946.82	132,202.89	(5,256.07)	
<i>Boeing</i>	-	-	-	-	-	-	-	-	
<i>TST Community Grant (Ends 12/31/2023)</i>	-	-	-	-	-	-	48,508.65	(48,508.65)	end of program
<i>Lift (Lightweight Innovations for Tomorrow) (05/01/2022 - 09/30/2023)</i>	-	-	-	-	-	-	47,538.67	(47,538.67)	end of program
<i>Ag Labor (02/14/2023-12/31/2024)</i>	310,000.00	-	-	-	-	310,000.00	440,428.94	(130,428.94)	Funds expended in PY23
<i>Subtotal</i>	436,946.82	-	-	-	-	436,946.82	945,711.13	(508,764.31)	
Program Expense Total	6,021,533.41	2,050,000.00	310,000.00	260,000.00	-	8,641,533.41	6,303,307.52	2,338,225.89	

	Direct Participant Services	Business Services & Solutions	Special Impact Projects	Misc. Contracts & Projects	Administrative Services	Total-PY24 Prelim	Total-PY23 MOD	Difference	Comments
Administrative Services									
Administrative Office Operations									
Salaries					1,653,981.25	1,653,981.25	1,499,438.45	154,542.80	Increase in Wages, and the Addition of 2 Employees
Benefits					690,135.51	690,135.51	661,452.06	28,683.45	10% increase in Medical and Additional Employees
Travel & Training					140,052.51	140,052.51	132,761.71	7,290.80	
Professional Services					317,616.51	317,616.51	179,166.51	138,450.00	25K LMI contract, and 75K computer support
Facilities					202,545.64	202,545.64	198,633.14	3,912.50	Standard increase in costs
Supplies & Communications					42,796.00	42,796.00	42,842.98	(46.98)	
Equip/Maintenance/Rentals					7,500.00	7,500.00	9,120.00	(1,620.00)	
Depreciation					-	-	0.00	-	
Insurance					11,161.99	11,161.99	11,161.99	-	
Memberships					18,730.00	18,730.00	18,230.00	500.00	
Misc.					108,000.00	108,000.00	51,360.00	56,640.00	
Admin Office Subtotal					3,192,519.41	3,192,519.41	2,804,166.84	388,352.57	
<u>Other Activities</u>									
Sector Strategies and LMI					-	-	25,000.00	(25,000.00)	Expense continued Included in Professional Services
Local Plan							90,000.00	(90,000.00)	Plan Completed
System Rent Support					60,000.00	60,000.00	-	60,000.00	Paying Costs Directly to save costs
Media					48,000.00	48,000.00	94,500.00	(46,500.00)	Included this year in sector work
HR Consulting (Employee Retention)					2,500.00	2,500.00	23,920.00	(21,420.00)	Minimal Use Anticipated
Launch Pad Scope					-	-	28,000.00	(28,000.00)	Work done in house
Other Subtotal					110,500.00	110,500.00	261,420.00	(150,920.00)	
One Stop Operator					-	-	75,000.00	(75,000.00)	Costs moved
One Stop Operator Subtotal					-	-	75,000.00	(75,000.00)	
Administrative Expense Total					3,303,019.41	3,303,019.41	3,140,586.84	162,432.57	
Total Expenditures	6,021,533.41	2,050,000.00	310,000.00	260,000.00	3,303,019.41	11,944,552.82	9,443,894.36	2,500,658.46	
<i>Admin Office Formula Carry Forward to PY25</i>						<i>1,072,487</i>	<i>1,020,908</i>		
<i>Admin Office Carry Forward Ongoing Grants to PY25</i>						<i>798,866</i>	<i>1,260,648</i>		
<i>Program Carry Forward Ongoing Grants to PY25</i>						<i>998,176</i>	<i>4,947,920</i>		
<i>Total Carry Forward to PY25</i>						<i>2,869,530</i>	<i>7,229,476</i>		