



## **REGION 2 WORKFORCE INVESTMENT BOARD LOCAL PLAN MODIFICATION**

City of Portland, Multnomah & Washington Counties  
03/18/09

### **INTRODUCTION**

In August 2006, the Workforce Investment Board for the City of Portland, Washington and Multnomah counties adopted a Strategic Plan for the years 2007-2009. The plan was a collaborative effort involving the input of nearly 120 regional business, labor, government, education and community-based representatives. The Plan followed the process undertaken by the Oregon Workforce Investment Board (OWIB) and is in complete alignment with the goals established in the OWIB Strategic plan, "*Winning In the Global Market*"

Like the OWIB Strategic Plan, our Regional Plan recognizes that business and individual competitiveness, high wage job growth and long-term economic security increasingly depend on a highly skilled, highly productive and flexible workforce. The overarching goal of the plan is to build a system that provides all citizens with a chance to acquire the skills needed to succeed in and support the regional economy. Achieving this goal remains our biggest challenge and brightest opportunity.

Since adopting the strategic plan, we have learned a great deal about our workforce, our economy and our role in helping to improve the economic well-being of our community. In general, we've learned that a combined focus on skill development in high-wage/ high-demand occupations is necessary to ensure that individuals are able to move to economic self-sufficiency and that businesses have the workers they need to grow and prosper in the 21<sup>st</sup> century economy.

We believe this is true even in the face of one of the worst economic slowdowns the region has ever experienced. Today our unemployment rate is more than double what it was when the plan was approved in the summer of 2007. Nearly 120,000 people are currently unemployed in our region (the highest number ever!) with most major industries experiencing significant job losses. In January 2009, every one of the 82 Industrial Classifications considered in our region showed a loss of employment, including healthcare.

Despite the downturn, we continue to hear about the need for more highly skilled workers. Labor market projections predict that in the next few years half of all jobs will require post secondary training/education, but less than a BA or more. By contrast, over 55% of the unemployed in our region have a high school diploma or less, and 1 in 6 workers in the region are over the age of 55. Unfortunately, the data also tells us that workers entering the labor market are much less educated than those who are leaving. Even in today's economy, many regional employers are feeling the labor market crunch, and concerns about the quality and availability of the "workforce pipeline" remain a major concern. Failure to close this gap will slow economic recovery, raise the dependency ratio, and increase inequality between skilled and unskilled workers.

In addition to widening skill gaps, the region is facing a number of additional complex workforce challenges, including increasing poverty, changing demographics, misaligned services, and decreasing resources. The reality is that the magnitude and urgency of these challenges are beyond the scale of any single organization to address. As such, everything we have done to date, and everything we must do moving forward, must be about organization and system building. Partnering remains a must – not an option.

## LOCAL PLAN MODIFICATION

*[Questions from the template provided by the State are boxed and in bold italics.]*

**1.a) & 1.b) Strategies and accomplishments from the local workforce board's 2007-2009 strategic workforce plan and next steps to align local investments with the OWIB's strategic plan:**

In an independent study conducted by EcoNorthwest it was determined that the resources managed by the Region 2 Local Workforce Investment Board represent about 11% of the total investments in the region for workforce development services. Making sure that we are strategically aligned with these other community investments is essential to supporting a continuum of services that offers access and value to all who need it. By pursuing a systems approach to workforce development, the region improves its ability to leverage and layer funding streams, to coordinate strategies, resources and programs, link supply and demand, and enable life long learning and advancement.

In building a regional system, we adhere to the following principles and strategies. These principles and strategies are closely aligned with the OWIB's strategic plan and the Governor's goals and priorities. They will continue to guide our investments as we build a high quality regional public workforce development system.

➤ **Skill Building And Living Wage Jobs:**

We will continue to evolve and direct our investments to more rapidly and efficiently connect individuals with high wage opportunities through:

- Expanding Career Pathways, On-the Job Training, and other innovative training strategies to ensure our investments are helping people pursue occupations that support and grow the regional economy.
- Expanding access to resources for occupational training and skill development to a broader cross section of the regional talent pool through the establishment of Access Centers and aggressive and creative outreach and recruitment, including recruitment of under-employed individuals, homeless, disabled, veterans and others traditionally facing barriers to employment.
- Establish a "Regional Training Provider List" to target investments in training for occupations that are in demand and offer opportunities leading to living wage jobs. Scholarships and tuition payments made through WorkSource Portland Metro Centers may be used only to support post-secondary education and training from the approved regional list, derived from the State Eligible Training Provider List.
- Establish and follow criteria for training investments:
  - Maximize the impact of limited federal and state workforce funds on the regional economy
  - Align federal and state workforce funds in the region with the Workforce Board's strategic plan
  - Target investments to meet needs of high growth/high demand industries
  - Skill-up incumbent workers
  - Train new workers to industry specifications for demand occupations that meet standards for public investment
- Fully implement the *Prosperity Planner* in WorkSource Portland Metro Centers and human services organizations to help evaluate and coordinate regional policy and program options and assist customers to develop realistic and achievable training plans. Specifically, the Prosperity Planner is a tool that may be used by local workforce boards to:
  - Evaluate the use and impact of a variety of work supports

- Establish standards to evaluate economic development
- Focus customers on job training that leads to employment in high wage high growth industries and occupations that support self sufficiency
- Demonstrate the “pay off” for investing in skill development and continuing education
- Create a common benchmark for evaluation and program improvement
- Determine eligibility and need for services ancillary to workforce services
- Provide career guidance to help individuals and programs make informed career and training choices
- Inform the public and policy makers about what’s involved in making the transition to self sufficiency
- Support and inform research into self sufficiency and the effectiveness of training investments

➤ **Resource & Service Coordination:**

WorkSource Portland Metro provides the foundation of the region’s primary public workforce efforts and creates the opportunity to connect and coordinate a variety of programs and services. WorkSource Centers create a single point of entry for anyone looking for workforce training or placement and a single point of contact for employers looking for workers.

- Aggressively build the WorkSource Portland Metro system and facilitate system integration and alignment, with an initial focus on our partnership with the Oregon Employment Department (OED). Effective July 1, 2008, we closed all stand-alone One-Stops and required all of our resources to be co-located with OED. Full co-location has proven to be the best way to align our respective resources, eliminate duplication, integrate services, attract partners and enhance the capacity and responsiveness to job seekers, workers and employers. This is particularly true in these tough economic times where the need to quickly reconnect workers with labor market and/or training opportunities is critical to the region’s economic recovery.
- Connect WIA youth resources and enrolled youth with the WorkSource Portland Metro system to create a broad, seamless continuum of workforce development services. Youth program resources will be targeted to providers who have demonstrated success in preparing and supporting youth with multiple barriers to transition to and complete postsecondary education or occupational training. In addition, youth providers have been geographically realigned with the 5 co-located WorkSource sites in our region. MOUs that define and delineate formal partnerships between youth providers and WorkSource Centers will be established to facilitate referral, service and resource coordination.
- Reinvent and transform the WorkSource Portland Metro system to establish the foundation to provide all citizens with a chance to acquire the skills needed to succeed in and support the regional economy. The renewed system includes the alignment of 28 federal, state and local funding streams and nearly \$30 million in annual investments.

While much work remains to be done, we are confident this new model will enhance and align services and resources, attract additional partners, and improve the responsiveness of the system to job seekers, workers and employers.

**1.c) Region 2 approach to the Governor's four focus areas for workforce development: healthcare; manufacturing; regional high wage/high skill jobs; and green jobs for clean technology:**

The Region 2 local board recognizes that it is only by meeting the needs of regional business that the workforce development system can accomplish its goals for individuals. In response, on behalf of the local board, Worksystems invests in a variety of activities to support regional business:

➤ **WorkSource Portland Metro:**

Through WorkSource Portland Metro, Region 2 provides individual companies and employers with a one-stop solution to finding and retaining qualified candidates. A company can call **503-257-HIRE** to access all available WorkSource services.

➤ **Industry Initiatives:**

In addition to the company specific services offered through WorkSource Portland Metro, on behalf of the local board, Worksystems undertakes a number of industry initiatives to help support regional industry competitiveness. Worksystems engages with key sectors to understand labor market trends, identify current and emergent workforce needs, engage partners, access grants, tax credits, and subsidies to craft comprehensive workforce solutions developed and driven by industry. Worksystems' industry initiatives share five common elements:

1. Focus on growth industries, customizing solutions for multiple employers and enhancing business access to training resources.
2. Engage industry representatives in the design, delivery and evaluation of workforce solutions responsive to real-time needs.
3. Promote strategies that help new and transitioning workers enter the industry and support pathways to career advancement for existing workers.
4. Employ a mutual investment model (public/private) to achieve better outcomes for both workers and multiple businesses within the industry.
5. Share accountability systems/common performance benchmarks.

Skill panels in our targeted industries are essential elements of our approach to workforce development and regional business services. Panels that are comprised of businesses from the same industry cluster and supply chain are co-convened by industry associations/consortia and Worksystems. The panels identify industry priorities for pipeline and incumbent worker training, develop training plans, and, in the case of incumbent worker training, select training providers.

In Region 2 the Regional Competitiveness subcommittee of the LWIB extensively reviews data from a variety of sources: local labor market information; local and state economic development strategies; training completion and employment placement rates; and direct employer feedback through Industry Cluster Skill Panels. Through this process the subcommittee targets the LWIB's training investments by industry for the region. All industries chosen must be high demand and all offer high wages for a skilled workforce. For the 2008-2009 program year, those target industries support the Governor's four focus areas and include:

- Bioscience
- Metals Manufacturing
- Green Building/Construction
- Renewable Energy
- Healthcare
- Software
- Transportation/Distribution/Logistics.

**2. Projects under consideration for funding from the ARRA that will be aligned and coordinated with the board's next steps described in #1.b) and c), above.**

Stimulus funds will be used to enhance and expand occupational training, skill development and employment services for underemployed, unemployed, laid-off workers and low income youth in this region, so they can get the basic and technical skills they need to get and keep a good job.

**Strategies:**

The strategies used to deliver these training, skill development and employment services will include:

- Continuing to build on foundational workforce system integration and alignment accomplishments in this region and use the existing publicly funded WorkSource system as the mechanism for the delivery of expanded and enhanced skill development services.
- Using the existing publicly funded WorkSource system to post available jobs, recruit applicants, coordinate/deliver skill development services and track results.
- Providing expanded basic academic and computer skills tutoring and remediation and ESL services to more adults and youth to prepare them for successful transition to post-secondary education, occupational training and apprenticeships.
- Providing scholarships and tuition assistance to enable increased numbers of unemployed adults and low income youth to obtain post-secondary occupational training required to qualify for high demand, middle skills, family wage occupations.
- Increasing the number of "earn and learn" opportunities, such as subsidized On-the-Job Training and adult work experience.
- Supplementing scholarships with a wide range of support services to cover basic needs necessary to help trainees stay in school and complete training and obtain critical certificates and credentials.
- Providing wages for summer internships so that significantly increased numbers of low income youth have the opportunity to earn and learn over the summer months.
- Providing campus-based guidance and support to increased numbers of low income youth so they can make a successful transition to and persist in post-secondary education.

**Training and Education Projects under consideration for funding from the ARRA:**

- **Build a Pipeline of Qualified Workers for Green Collar and Healthcare Jobs:** Provide job seekers [low income, barriered, under-employed adults and laid-off workers] with career guidance, career planning, career exposure, skill development and tuition scholarships for occupational training to inform and prepare for middle skills green collar and healthcare jobs that are in demand and pay a living wage.
- **Retrain and Reemploy Increased Numbers of Laid-Off Workers:** Target job training, re-training, career guidance, tuition scholarships and skill upgrades for workers laid off from jobs in the manufacturing, construction, high tech and finance sectors to transition them into occupations in healthcare, renewable energy, clean tech, bioscience and green building
- **Expand WorkSource Portland Metro Tuition Scholarships:** Increase the number of tuition scholarships for unemployed adults and low income youth to

access post-secondary training required to qualify for high demand, middle skills, family wage occupations.

- **Expand Services at WorkSource Access Centers:** Expand the services available on-site at WSPM Access Centers. In addition to access to state of the art computer technology, software and technical support for the delivery of on-line skill development and employment tools, individuals served by WSPM Access Centers will receive on-site delivery of WorkSource Oregon Welcome, Skill Development and Employment services by mobile teams of WorkSource staff. Access to WorkSource services at other sites in the community, which may include libraries, community college campuses and additional community-based organizations, will be expanded as resources allow.
- **Expand Access to Adult Basic Skills and Computer Literacy Services:** Expand the number of adults who access tutoring and basic, foundational literacy skill development in a self-paced, open entry environment at all WorkSource Portland Metro Centers and Access Centers. Specifically:
  - Reading & math labs—tutoring for job seekers with reading/math skills at or above 6<sup>th</sup> grade level;
  - Computer labs with modular instruction in Windows, Internet/Email and MS Word;
  - English as a Second Language labs for English skills required in targeted occupations;
  - Vocational adult literacy services—competency-based basic academic skills contextualized to a targeted industry and integrated with occupational skills training and opportunities for internships and employment.
- **Expand Support Services for Trainees:** Expand support services for individuals in occupational training to assist them with the costs of child care, transportation, and other basic needs to make it possible to successfully complete training.
- **Provide Paid Summer Jobs for Youth:** Significantly increase the number of low income youth who will be paid to work in summer internships, receive tutoring/credit recovery and visit college campuses and businesses to explore college and career options. Scholarships will be available for qualified youth who have a HS diploma or GED, successfully complete a summer internship and need assistance to go to college.
- **Enhance Support for Post-Secondary Transition and Persistence:** Provide career guidance, coaching and support for low income youth in alternative education to increase the number of these youth who have the skills to succeed in postsecondary education and training and the necessary supports to successfully complete a course of study.

**3. How the LWIB will include and engage state and local partners—business, labor, education, community-based organizations, Department of Human Services TANF, DHS Vocational Rehabilitation and other partners, beyond membership on the Local Board, in the development and implementation of #1a) and #1b), above.**

- A Disability Navigator made available through a Department of Labor grant convenes Integrated Resource Teams comprised of public agencies and community-based organizations that have an integral role in serving WorkSource customers. These Integrated Resource Teams often include Vocational Rehabilitation, TANF, county housing providers, and community service providers.

- Collaboration between Worksystems and Construction Apprenticeship Workforce Solutions (a local construction industry association) has enabled WorkSource to provide pre-apprenticeship training to youth transitioning into the adult WorkSource system through Portland YouthBuilders.
- Worksystems is a partner in Portland's 10 Year Plan to End Homelessness, a citywide consortium of service providers coordinating service delivery for homeless and mentally ill people. "Worksystems participation in this forum has improved access to WorkSource services for the City's homeless and mentally ill residents and improved access for WorkSource customers to housing and mental health services. Worksystems recently operated a WorkSource kiosk where customers could register and access services at Project Homeless Connect, a citywide homeless service fair.
- Title V programs are engaged onsite at all WorkSource Centers in Region 2. This partnership includes arrangements to facilitate access for older workers to WorkSource services and the placement of Title V trainees within WorkSource Centers. Worksystems has recently engaged all three Title V providers in Region 2 to increase the coordination and service offerings for older workers within WorkSource.
- Worksystems has assigned a Senior Project Manager to coordinate with VR around how to access WorkSource in the context of the new, integrated service system. This has been particularly important in the context of VRs move to an "order of selection" intake process.
- Two major WorkSource partners operating four of the five WorkSource Centers in Region 2 are also TANF providers. This programmatic overlap has strengthened the coordination between the WIA and TANF systems in Region 2 and resulted in TANF relaxing work-first requirements for customers engaged in WorkSource training last October.
- Worksystems operates five "Access Centers" throughout Region 2. Through Access Center agreements, WORKSYSTEMS locates computer technology equipped with WorkSource branding and software tools within partner organizations. Access Centers are staffed by the host organizations, provide access to an array of technology-based services, and serve as a conduit into WorkSource Centers for customers needing additional skill development and employment services.
- Membership of the Regional Competitiveness Committee of the LWIB, referenced in 1c, includes local and state Economic Development, Organized Labor, Oregon Employment Department, Community Colleges and businesses. This committee not only directly controls the direction and prioritization of training resources but also serves to evaluate the impact of those investments.
- Since the regional system is demand-driven, the most important stakeholders to include in this process are regional employers from high growth-high demand industries. Through Industry Cluster Skill Panels, businesses within the targeted industry or cluster decide on the specific training priorities their industry needs to be more competitive. As a result the R2 LWIB is able to increase the impact of limited funds to benefit companies across the cluster. These companies also inform the new worker pipeline efforts in the region as well. When possible employers are engaged throughout the training process: screening applicants for training, informing training curriculum and hiring training graduates upon their successful completion of training.
- Consumers of services from our partners such as DHS, TANF, Voc Rehab, and other Community Based Organizations have access to all of the training resources available through WorkSource Portland Metro (cited above).

**4. Communication and marketing efforts, including WorkSource Oregon (WSO) Centers branded with the WSO brand and other uses of the brand, including local communications plan and/or activities that inform the community of WSO services.**

On behalf of the local board, Worksystems communications strategy targets several audiences, including workforce partners and contractors, elected officials, business, labor, community based organizations, economic developers, the news media, and job seekers. All five WorkSource Centers in Region 2 are branded WSO Centers in which WIA IB providers are co-located with OED. Four of the five WSPM Centers are OED facilities.

WorkSource Portland Metro is promoted in all Worksystems communications, including:

- Website – Worksystems has a redesigned website ([www.Worksystems.org](http://www.Worksystems.org)) with robust content.
- Earned Media – Worksystems is working with a communications firm to help us identify a series of stories that can carry our messages. We have also developed relationships with key journalists and will be pursuing coverage through editorial boards and OpEds.
- Collateral Materials – Information about WorkSource Portland Metro is included in collateral materials promoting the use of the public workforce system. In addition, we are about to begin a campaign to actively promote the use of 503-257-HIRE and the single phone number to call for businesses needing workers.
- Social Media – We have developed a blog (<http://blog.Worksystems.org>), a twitter account (<http://twitter.com/Worksystems>) and are in the process of developing a workforce Wiki to have online conversations with our provider community and partners regarding WSO service integration.
- Presentations – We utilize our quarterly LWIB meetings to educate/inform the board and broader community on workforce issues and performance of the system. Worksystems staff are also active members of many area boards and committees and regularly discuss our initiatives and promote the system. On behalf of the local board, we routinely present at national conferences on our best practices and meet with our congressional delegation on important workforce issues such as reauthorizing the Workforce Investment Act.

**5.a) Accomplishments from the LWIB integration plan that was submitted in the summer of 2008:**

Region 2 has fully committed to the integration plan submitted in the summer of 2008 and has made tremendous strides toward achieving an integrated one-stop service delivery system. The following accomplishments are hallmarks of our progress:

- WIA 1-B and Oregon Employment Department staff are co-located in all five WorkSource Centers in Region 2.
- Integrated teams have been established and are working under functional supervision.
- A common customer pool has been established throughout the WorkSource Portland Metro system.

- Customers are served by integrated teams and through an integrated flow of services.
- Case management has been discontinued and replaced with an emphasis on direct access to skill development and employment services.
- A menu of demand-driven services is being offered at WorkSource Centers.

***5.b) &c) Goals, activities and/or tasks from the LWIB integration plan that was submitted in the summer of 2008 that need to be addressed now, in the short term (6 months – 1 year) and in the long term (2-3 years). Issues that remain that CCWD/OED and/or OWIB can help to bring to resolution.***

**Management Information Systems:** There is no connectivity between IMatch and Itrac outside of Common Intake. Consequently, we have no ability to track performance against DOL Common Measures, Region 2's local measures, or State of Oregon performance measures #2 and #3. This lack of information is seriously impairing our ability to manage and oversee our WIA investments.

**Leadership Directives and Performance Frameworks That Undermine Service Integration:** The promotion of IMatch Skills – through directives issued by OED leadership as well as internal OED metrics – is so categorical and fervent that OED managers are reluctant to commit staff to any employment services beyond IMatchSkills. Consequently, OED staff resources do not significantly support the rich array of employment services identified in Region 2's Service Integration Plan and procedures manual. We need one set of performance measures that apply equally to both OED and IB.

**Systematic and Regular Access to Data/Reports:** Lack of open access to and regular, periodic reports of data on the characteristics of individuals in our region receiving UI benefits diminishes the capacity of the workforce system to respond effectively to the workforce needs of regional businesses. Region 2 and all other WIBs in the state have asked for monthly reports of regional customers in IMatch by:

1. Age
2. Demographics
3. Degree/certificate & course of study
4. Occupational area of experience by years of experience
5. Apprenticeship affiliation

Region 2 and all other WIBs in the state have asked for regular, periodic reports of regional information about employers who list jobs with IMatch that are accessible/available to WIBs on a monthly basis:

1. Number of employers listing jobs with IMatch
2. Number of listing employers by industry and occupation
3. Number of jobs listed in IMatch per month by industry and occupation
4. Number of jobs listed by starting wage

**Center Resources Serving Non-Common Customers:** Though this contravenes the Compass Policy and other state guidance around integration, there is a large stream of Wagner-Peyser customers being given staff assisted job referrals through IMatchSkills who never enter the common customer pool. This is driven by the OED metrics around IMatchSkills described above. More OED staff appear to be devoted to this activity than to providing employment services to common customers of WorkSource. This directly undermines service integration and depletes the resources of 1-B staff as they strive to compensate in providing services to common customers.

**The WIN Assessment:** The purpose of the WIN assessment is not clear. Region 2 has requested clarification about whether English language is a content area to be assessed by the WIN or a language format that one version of the WIN is provided in. If English is not a content area to be assessed, then the WIN should be made available in a variety of language formats including Spanish, Russian and Vietnamese.

Also, the WIN takes too much time to be administered in a universal intake process. Administering this time intensive assessment has required us to allocate a disproportionately large share of staff resources to the Welcome process and has seriously diminished our ability to provide skill development and employment services.

**Claimant Reemployment Orientations:** The OED mandate to maximize the number of claimants brought through CRE sessions is resulting in a disproportionate emphasis on conducting the CRE process to the exclusion of providing skill development and employment services. Also, in the integrated service environment we have implemented in Region 2, the CRE process is bringing a very large stream of customers into our common system with ramifications for all WorkSource partners. We believe it is crucial that all WorkSource partners are at the table in deciding how this is done, but have not been engaged in these decisions.

**Unemployment Benefits & Training:** Current OED policy bars laid off workers who wish to receive UI benefits from participation in skill development activities, including skill upgrades and occupational training, that would make them more competitive for jobs and put them back to work.

**Common Intake and Dislocated Worker Eligibility:** The 3 questions currently asked in Common Intake/WORP to establish eligibility for WIA Dislocated Worker services do not capture enough information to allow for all dislocated workers to become eligible. The current Common Intake system rules don't allow customers or staff to update customer data if a customer's circumstances change and they become eligible after registering. The State should add additional questions to CI/WORP to capture all possible dislocated workers who enter our Center and modify CI/WORP rules to allow the updating of customer information.