

**Workforce Innovation and Opportunity Act**  
**Local Plan**  
**The City of Portland**  
**Multnomah and Washington Counties**

Submitted by  
Worksystems, the Portland Metro  
Workforce Development Board

July 1, 2016 – June 30, 2020

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## **Worksystems, the Portland Metro Workforce Development Board**

Worksystems, the Portland Metro Workforce Development Board (Worksystems) is a 501 (c) 3 not-for-profit organization that pursues and invests resources to improve the quality of the workforce in the City of Portland, Multnomah and Washington counties. Our mission is to coordinate a regional workforce system that supports individual prosperity and business competitiveness.

In pursuit of our mission, Worksystems:

- Invests in education, community-based and industry partners to improve the quality of the region's workforce.
- Builds linkages between regional governments, business, labor, education and other leaders to enhance regional workforce, education and related policies, programs and services.
- Facilitates ways to rapidly identify critical workforce issues and implement innovative solutions.
- Coordinates industry feedback and input.
- Pursues resources to support, expand and enable best practices.
- Aligns workforce development activities with regional business, economic development and education strategies.
- Advocates in support of policies, programs and investments to improve the quality of regional workers, industries and jobs.
- Evaluates program quality and outcomes.

### **Roles & Responsibilities**

In 2012, Oregon adopted a ten year strategic plan developed by the Oregon Workforce Investment Board (OWIB) and developed a 10-year budget plan to better align resources , strategies and services for the new economy.

In July 2013, the Governor signed an Executive Order to re-charter Oregon's State and Local Workforce Development Boards to create a "convening table" for business, labor, economic development, elected officials, education and human service providers to create community-based solutions to today's and tomorrow's workforce challenges.

In July 2014, President Obama signed the Workforce Innovation and Opportunity Act (WIOA) into law replacing the Workforce Investment Act of 1998. Like the changes in Oregon, WIOA prompts Local Workforce Development Boards to be increasingly engaged in the business of collaboration, convening and partnership.

Following is a summary of the Executive Order and the WIOA and specifically the provisions that directly impact the roles and responsibilities of Local Workforce Development Boards and their members.

#### **Executive Order 13-08 - July 25, 2013**

"The path forward requires bold partnerships among business, government, labor and the nonprofit sector. Oregon's State and Local Workforce Investment Boards, which are organized as business-led partnerships, provide a "convening table" for labor, economic development, elected officials, education, workforce

development and human service providers to create community-based solutions to today's and tomorrow's workforce challenges." – Governor John Kitzhaber

Local Workforce Development Board's must assure:

- Oregonians have the skills they need to fill current and emerging high-wage, high-demand jobs.
- Employers have the skilled workforce they need to remain competitive and contribute to local prosperity.
- The workforce system is aligned, provides integrated services and makes efficient and effective use of resources to achieve better outcomes for businesses and job seekers.

This Executive Order also charges those state agencies that administer workforce programs to work with the State and Local Workforce Development Boards to align Oregon's workforce system in light of reduced resources and the changing economy.

To that end, since June 30, 2015, all Local Workforce Development Boards have become neutral, independent brokers of workforce services, purchasing services from those equipped to deliver the best possible results.

In addition, Local Workforce Development Boards are required to:

- Better direct public workforce investments at the state and local level for talent development, job creation, income progression, business competitiveness, integrated service delivery and expanded opportunities for citizen prosperity;
- Use labor market intelligence to better align economic development, education and training, and workforce development investments and services for job seekers and businesses to efficiently address local labor market needs and statewide priorities;
- Expand private-public partnerships with an integrated workforce system to better meet the needs of communities and create solutions to address tomorrow's workforce challenges;
- Partner with Regional Solutions Committees to identify and leverage opportunities to expand job creation and incent job growth; and
- Be accountable for workforce system outcomes.

### **Workforce Innovation and Opportunities Act - July 22, 2014**

Section 107 of WIOA outlines the roles and responsibilities of Local Workforce Development Boards:

- Develop the Local Workforce Plan.
- Conduct Workforce Research and Regional Labor Market analysis.
- Convene, broker, leverage local providers, stakeholders and resources.
- Lead employer engagement to promote business representation, develop linkages, implement effective strategies (sectors), and ensure workforce investments support the needs of employers.
- Lead efforts to develop and implement Career Pathways.
- Identify and promote proven and promising practices.
- Maximize the use of technology in the provision of services to job seekers and employers.

- Conduct program oversight to ensure appropriate use, management and investment of workforce resources.
- Negotiate local performance measures.
- Select operators and providers.
- Identify eligible providers of training and career services.
- Coordinate the delivery of core WIOA programs through the one-stop system, known regionally as WorkSource Portland Metro.

## Capabilities

Worksystems brings the following capabilities to carry out these responsibilities and implement the Plan:

People: Worksystems has a pool of talented, creative, accomplished staff with a proven track record of success. They are expert in rapidly identifying critical workforce issues and implementing innovative solutions. The knowledge expertise of Worksystems staff can be invaluable to companies or organizations who are formulating workforce related strategies, plans or implementation approaches.

Connections: Worksystems has a comprehensive understanding of the regional workforce and education landscape and can help facilitate organizational and resource connections to solve complex workforce problems. We have longstanding relationships with businesses, labor unions, community-based organizations, educational institutions, local governments and others with an interest in enhancing the quality of the region's workforce. These connections minimize the points of contacts for our industry and community partners, making the transfer of information about programs and services more time and cost effective.

Supporting Skill Development and Training: Worksystems provides funds to help job seekers and youth acquire the skills they need to support themselves and regional industry. Our investment strategy optimizes available resources by aligning and integrating essential workforce and education services such as labor exchange, career planning, basic academic skills, occupational training and work-based support services.

WorkSource Portland Metro serves as Worksystems' primary investment vehicle for services to adult job seekers. Our youth investments go through a network of 9 community based organizations – referred to as the Career Connect Network – and support work readiness training, subsidized internships and other work-based services for young people to ensure they have the basic and soft skills required to succeed in the workplace.

Research and Analysis: Worksystems is committed to providing and using high quality information to support the region and guide our investments. We commission the following research on a regular basis:

- State of the Workforce Data Book
- Sector Reports and Skills Needs Assessments for Advanced Manufacturing, Health Care, Construction and IT/Software
- Analysis of Disconnected Youth
- Self Sufficiency Standard for all Oregon Counties and analysis of who's not meeting the standard in our region

We are dedicated to assuring this information is regularly updated and presented in a way that supports the region's ability to understand and align regional workforce supply with regional business demand.

In addition, we partnered with the Oregon Employment Department to co-locate a regional economist and several workforce analysts with Board staff to provide a stronger connection to real time labor market information.

Since 2015, we have convened a bi-state, 30+ member Research and Analysis Committee comprised of education, workforce, economic and community development organizations. The purpose of the Committee is to bring together a broad coalition of partners who produce and use labor market information to share data between agencies and to increase our regional capacity to generate and analyze high quality research in support of our common community development goals. This Committee is under the umbrella of the Columbia Willamette Workforce Collaborative, a partnership lead by the Workforce Boards representing the broader Portland-Vancouver metropolitan area.

Financial Management/Grant Administration: Worksystems has successfully managed over \$350 million in federal, state and local grants and contracts since its inception in 1998. Our administrative and management services are cost effective, flexible and well versed in the requirements and expectations of federal, state and foundation funders.

Customer Tracking and Reporting: Worksystems owns a state-of-the-art, web-based, customizable data management system (I-Trac) that has successfully tracked more than 1 million customer records for a variety of federal, state and local grants and customers.

## **System**

In accordance with State requirements, this Plan includes the following Core WIOA programs:

- Adult Program (Title I of WIOA)
- Dislocated Worker Program (Title I)
- Youth Program (Title I)
- Adult Education and Family Literacy Act Program (Title II)
- Wagner-Peyser Act Program (Wagner-Peyser Act, as amended by Title III)
- Vocational Rehabilitation Program (Title I of the Rehabilitation Act of 1973, as amended by Title IV)

Although not technically Core WIOA Programs, the State Plan adds the following: *“TANF and SNAP are mandatory partners and services will be accessible in the one-stops. Oregon has chosen to submit a Unified Plan at this time, although language in the plan and communications from the OWIB and the Governor outline expectations that the workforce system includes the self-sufficiency programs at DHS.”* Accordingly, TANF and SNAP are included as part of this Plan.

The purpose of this Plan is to set the requirements and parameters for the work that must be undertaken at the local level to comply with state expectations and the Workforce Innovation and Opportunity Act (WIOA). Section 678.420 of WIOA implementing regulations says: *“Each required partner must: (a) Provide access to its programs or activities through the one-stop delivery system.”* WorkSource Portland Metro is the region’s one-stop delivery system.

## Commitment

We understand that workforce development, economic development, and education are the cornerstones of a prosperous community. Heightened efforts to align workforce supply with industry demand are essential, and these efforts are strengthened when we work together to bridge the gap between disciplines, resources and jurisdictions. Worksystems is committed to convening partners and aligning resources to achieve the vision of WIOA and help job seekers acquire the skills they need to support themselves and meet the talent needs of regional employers.

### Section 1: Workforce and Economic Analysis: Understanding Regional Demand

1.1 An analysis of the economic conditions including existing and emerging in-demand industry sectors and occupations; and the employment needs of employers in those industry sectors and occupations. [WIOA Sec. 108(b)(1)(A)]

#### Overview

WorkSource Portland Metro consists of Multnomah and Washington counties, the 2 most populous counties in Oregon. They are also home to the largest number of jobs: 760,100 combined (2015); 43 percent of the statewide total.

Portland Metro's economy is running on all cylinders entering 2016. Employers added 23,300 jobs in 2015 for a growth rate of 3.2 percent. The region hasn't seen this pace of growth since 2006 and, before that, the heyday of the mid-1990s. The area is part of a larger metropolitan area which was the 11<sup>th</sup> fastest-growing large metro in the nation in 2015.

Recent growth has been broad based, with most major industries adding jobs. Nearly nine out of 10 new jobs were created by the private sector. The *professional and business services* sector added the largest number of jobs and was also the fastest-growing (+5,600, +4.5%). This sprawling sector includes a wide variety of industries, from accounting to waste collection. All published components contributed to growth.

*Private education and health services* added the second-largest number of jobs (+3,600). The health care component racks up solid gains every year, even during the last recession, as the area's population grows and ages. This trend will likely continue in the foreseeable future.

*Manufacturing* remains an engine of growth for the region. It added 3,300 jobs in 2015 (+4.2%), outperforming the overall economy and growing nearly four times faster than manufacturing nationally.

A growing population, thriving tourism, rising wages, and falling gas prices pushed up demand and consequently employment in the region's *leisure and hospitality* sector (+3,200 jobs). The immediate outlook is bright, as several new hotels and numerous restaurants are scheduled to open in the coming year.

The *finance* industry has struggled since the end of the recession, consistently lagging most other industries and still thousands of jobs off pre-recession levels. It launched a comeback in 2013 which fizzled the following year. Growth resumed in 2015 (+700 jobs), with the insurance and real estate components leading the charge. Banking remains in the red.

After outperforming most other industries since 2011, *construction* took a breather in 2015, shedding 900 jobs. This lull won't last long given the increasing number of cranes dotting the Portland skyline and the nearly 14,000 new building permits issued in 2015 (Portland Metropolitan Area).

## In-Demand Sectors

Worksystems has identified four industry sectors as key to the local economy. These industries generally align with those selected by Clackamas Workforce Partnership and Southwest Washington Workforce Development Council, acknowledging the benefits of a unified and coordinated approach to workforce and economic development. These industries also provide a variety of career paths that offer workers multiple opportunities to advance skills and increase earnings.

## **Software/IT**

### Overview

The Software/IT industry is comprised of software publishing, data processing, and computer systems design. Nearly 2,000 firms provide 19,000 jobs in Portland Metro (2015), or 3 percent of total private-sector employment. It generated \$1.9 billion in wages, 5 percent of total.

The sector pays well. The average wage topped \$100,000 in 2015; 75 percent higher than the average across all industries. It's not just a handful of well-compensated CEOs bringing up the average- almost half of all workers earned \$40 an hour or more, and nearly one-third earned \$50 hourly (statewide).

Portland Metro has a slight competitive advantage in Software/IT in that employment is more concentrated in the region (2.8% of total employment) compared to the nation (2.1%). Employment in the software publishing component is nearly four times more concentrated.

Workers in the Software/IT industry are slightly more likely to stay with their current employer compared to workers in other industries. The turnover rate is 8.2 percent compared to 9.4 percent across all sectors. The software publishing component has a lower turnover rate of 6.3 percent.

### Recent Trends

Software/IT added 6,700 jobs over the past decade for a growth rate of 61 percent, nearly one-and-a-half times faster than the sector nationally. In fact, Portland Metro's growth has outperformed the nation in all but one of the past 10 years.

The sector was relatively unscathed by the Great Recession, losing just 800 jobs in 2009 which were quickly recovered by early 2011. In the years following the recession, the sector has added jobs twice as fast as the rest of the economy.

### Occupations

Nearly 300 different occupations are found within Software/IT. The ten largest dominate, comprising well over half (57%) of sector employment. Software developers top the list, followed by computer support, systems analysts, and programmers.

However, Software/IT-related jobs are not limited to the sector. They are found in virtually every industry across the economy as an increasing number and variety of companies use some form of computer technology in their day-to-day operations. The ten largest occupations within the sector employ about twice as many people outside the sector in industries such as health care and banking.

Innovating, designing, coding, and supporting a wide array of dynamic and complex tech products requires a well-educated and highly-skilled workforce. More than half of the sector's occupations, which account for two-thirds its current workforce, require a Bachelor's degree or higher.

## Outlook

Technological innovation and increasing demand will fuel strong growth in Software/IT in the coming years. Cloud computing & cyber security will power the growing mobile computing market, and these devices will rely on software to become more powerful, efficient, and secure.

Portland Metro's Software/IT sector is expected to ride this wave, creating 7,200 new jobs between 2014 and 2024 for a growth rate of 66 percent; roughly four times faster than the overall economy.

## **Advanced Manufacturing**

### Overview

The Advanced Manufacturing sector includes high tech, metals, machinery, transportation equipment, and food processing. With 65,600 jobs and a payroll of \$6.1 billion (2015), Advanced Manufacturing accounts for 10 percent of Portland Metro's private-sector employment and 16 percent of payroll. Annual wages averaged \$93,700; \$36,600 (64%) more than the average across all industries.

Exports are critical to the region's economy. According to the Brookings Institution, total exports directly supported more than 94,000 jobs in the greater Portland metropolitan area (2014). Advanced Manufacturing accounted for the vast majority of the metropolitan area's exports; at 80 percent, it's the largest share among the nation's major metro areas. Local exports are dominated by computer equipment.

Portland Metro has a competitive advantage in Advanced Manufacturing in that employment is more concentrated in the region (10.0% of total employment) compared to the nation (6.9%). Employment in the high tech manufacturing component is more than three times as concentrated due largely to Intel's operations in Washington County.

Workers in Advanced Manufacturing are more likely to remain with their current employer compared to workers in other industries. The turnover rate is half that of all industries (4.6% compared to 9.4%). The high tech manufacturing component has an especially low turnover rate of just 3.4 percent.

### Recent Trends

Advanced Manufacturing is a cyclical industry, locally and nationally. It was hit hard by the recession, shedding 8,500 jobs by 2009, or 13 percent of its employment base. It made a full recovery by 2015, bucking national trends where sector employment is still significantly off (-8.4%) pre-recession levels.

In 2015, Advanced Manufacturing grew 4.9 percent (+3,100 jobs), comfortably outpacing the overall economy (3.2%).

### Occupations

Approximately 350 occupations are found within the Advanced Manufacturing sector. The 10 largest occupations account for one-quarter of total employment.

Educational requirements range from less than a high school diploma to a Master's degree, although the need for a college education is the exception rather than the rule:

Two-thirds of the sector's occupations, which account for three-quarters of its current workforce, require no more than a high school diploma.

## Outlook

Portland Metro's Advanced Manufacturing sector is expected to expand by 9,000 jobs between 2014 and 2024 for a growth rate of 14 percent; slightly slower than the overall economy.

## **Health Care**

### Overview

The Health Care sector includes hospitals, offices of physicians, dentists and other health care providers, outpatient health clinics, and nursing and residential care facilities. With 68,800 jobs and a payroll of \$3.9 billion (2015), Health Care accounts for 11 percent of Portland Metro's private-sector employment and payroll.

Wages averaged \$57,000 in 2015, about the same as the overall economy. Higher wages in ambulatory care (\$67,000) and hospitals (\$64,500) were partially offset by low wages in nursing and residential care (\$27,200). The three largest occupations in this component -nursing assistants, personal care aides, and home health aides- make up nearly half of employment and pay less than \$30,000 a year.

Overall, Health Care has less turnover than the overall economy (7.1% versus 9.4%). The exception is the long-term care component, at 10.9 percent. According to the National Commission for Quality Long-Term Care, low job satisfaction, poor pay and benefits, and the emotional and physical toll of providing long-term care contribute to high turnover in this component.

### Recent Trends

Health Care is a key driver of employment growth at both the national and local level. It has added jobs every year over the past decade, even throughout the recession- the only major industry to do so. Employers created 15,000 new jobs between 2004 and 2014 for a growth rate of 29 percent; over twice as fast as the overall economy. The ambulatory care component (e.g. doctors' offices) led growth.

### Occupations

More than 400 occupations are found throughout the Health Care sector. The 10 largest occupations, headed by Registered Nurses, account for half of total employment.

Educational requirements range from less than a high school diploma to a Doctoral or professional degree, although the need for a college education is more prevalent in Health Care compared to the overall economy. Four out of ten of the sector's largest occupations, which account for 42 percent of its current workforce, require a Bachelor's degree or higher.

## Knowledge, Skills, and Abilities Most Prevalent in the Top 10 Health Care Occupations

Knowledge	Skills	Ability
Customer and Personal Service English Language Psychology Medicine and Dentistry Education and Training Administration and Management Computers and Electronics Public Safety and Security Therapy and Counseling Biology	Active Listening Critical Thinking Social Perceptiveness Speaking Service Orientation Coordination Monitoring Reading Comprehension Writing Active Learning	Deductive Reasoning Near Vision Oral Expression Speech Clarity Oral Comprehension Speech Recognition Written Comprehension Problem Sensitivity Inductive Reasoning Information Ordering

Source: O\*Net, prepared by Oregon Employment Dept.

### Outlook

The landscape of Health Care has changed over the past few decades, reflecting a shift in the way services are delivered. Ambulatory health care is growing rapidly, and consequently representing a greater share of employment. More people are turning to doctors' offices and clinics (outpatient services) for Health Care. This trend will likely continue as a result of the Affordable Care Act, as more people attach to primary care practitioners. Also, as health reform shifts practitioners' focus from treatment to prevention, there will likely be shifts in delivery that result in workforce changes - such as an increased need for Community Health Workers.

Portland Metro's Health Care sector is expected to add 17,400 jobs between 2014 and 2024 for a growth rate of 26 percent; faster than the overall than the overall economy. Growth will be driven by:

- An expanding population; the Portland Metro region is expected to add 183,000 new residents between 2015 and 2025.
- An aging population: the 65+ age group will grow six times faster than the rest of the population between 2015 and 2025 (51% vs. 8%).
- Longer life expectancies and new treatments and technologies.

### **Construction**

#### Overview

The Construction sector includes companies primarily engaged in the construction of buildings, engineering projects (e.g. highways), preparing sites for new construction, and specialty trades (e.g. painting, plumbing, electrical). With 32,200 jobs and a payroll of \$2.0 billion (2015), Construction accounts for 5 percent of Portland Metro's private-sector employment and payroll.

Wages averaged \$61,800 in 2015; about \$5,000 more than the average across all industries.

Construction has significantly more turnover than the overall economy (12.4% versus 9.4%). This is likely due to the nature of the industry: as projects are completed, many workers are laid off then rehired onto other projects. Some churn might also be attributed to a tightening labor market.

### Recent Trends

Construction is a cyclical industry, with dramatic booms (1990s, mid-2000s) and busts (Great Recession). It was one of the hardest-hit industries in the recession, losing 11,000 jobs, or nearly one-third of its employment base. Since turning the corner in 2011 it's regained 7,500 jobs, growing significantly faster than the rest of the economy and outpacing its national counterpart two-to-one. 2015 saw a lull, but growth should resume in the near future.

### Occupations

Roughly 150 occupations are found within Construction. Many of the largest occupations are relatively unique to the sector and not often found elsewhere in the economy (e.g. carpenters, plumbers, painters).

Educational requirements range from less than a high school diploma to a Bachelor's degree, although the need for a college education is the exception rather than the rule:

Three-quarters of the sector's occupations, which account for over 80 percent of its current workforce, require no more than a high school diploma.

### Outlook

Portland Metro's Construction sector is expected to expand by nearly 9,000 jobs between 2014 and 2024 for a growth rate of 26 percent; faster than the overall economy. Growth will be driven by an expanding population: Portland Metro is expected to add 183,000 new residents between 2015 and 2025. Solid job growth across the rest of the economy will also lead to more commercial and industrial projects and Construction work.

1.2 An analysis of the knowledge and skills required to meet the employment needs of the employers in the local area, including employment requirements for in-demand industry sectors and occupations. [WIOA Sec. 108(b)(1)(B)]

### Industry

Portland Metro is expected to add 133,000 jobs between 2014 and 2024 for a growth rate of 18 percent. Growth will be broad based, with all major sectors seeing gains. Job growth will be fueled by: The manufacturing sector. IHS Economics projects that Oregon will have the fourth fastest-growing Gross State Product among all states. Income growth. Oregon's total personal income is expected to increase 5.2 percent annually; the eighth-fastest among all states. Population growth. Portland Metro will add 183,000 new residents between 2015 and 2025. Over half of the increase will come from net in migration and, if recent trends hold true, many of these people will arrive with a Bachelor's degree or higher in hand. Industry structure. Many industries in which Portland Metro has a large or growing are expected to perform well over the coming decade. Examples include company headquarters, food and beverage manufacturing, and software publishing. The professional and business services sector – which includes computer systems design services, temporary employment agencies, and business support services, among other industries – is projected to add the largest number of jobs (34,500), followed by private health care (21,800). The construction industry will continue its recovery from massive recessionary job losses, adding jobs at a faster pace than most other industries (27%).

### Occupational

Most occupations will add jobs over the next ten years. Not only will employers need to fill these new jobs, they will also need to fill those jobs that become vacant when people leave, usually due to retirements. In general, for every two jobs created due to economic growth, three become open due to vacancies (retirements). For

Portland Metro, this means that in addition to the 133,000 new jobs from economic growth, the region’s employers will also need sufficiently trained workers for the approximately 200,000 jobs that will become open as people leave. (Technical note: replacement openings are estimated based on 2012-2022 factors). The *typical* educational requirements for these projected openings range from less than high school to a Doctoral degree. For both growth and replacement openings, employers will need approximately 333,000 additional workers by 2024. Nearly 100,000 of these openings won’t require a high school diploma (e.g. waiters and waitresses, cashiers, retail salespersons, food workers); 115,000 will require a diploma or equivalent (customer service reps, office clerks, secretaries); 29,000 will require some sort of postsecondary education (no degree) (bookkeepers, heavy truck drivers, nursing assistants); 14,000 will require an Associate’s degree (preschool teachers, electrical engineering techs, graphic designers); 63,000 will require a Bachelor’s degree (accountants, software developers, elementary school teachers); the remaining 14,000 will require a Master’s degree or more (lawyers, physicians, postsecondary teachers, mental health counselors).

Employment Growth by Educational Requirements, 2014-2024, All Industries

	Typical Educational Requirement			Competitive Educational Requirement		
	Growth Openings	Replacement Openings	Total	Growth Openings	Replacement Openings	Total
Less than high school	32,100	65,700	<b>97,800</b>	-	-	-
High school diploma or equivalent	44,100	70,700	<b>114,800</b>	45,400	89,700	<b>135,200</b>
Postsecondary training (non-degree)	12,900	16,300	<b>29,200</b>	28,400	42,300	<b>70,700</b>
Associate's degree	6,500	7,600	<b>14,100</b>	12,200	16,100	<b>28,200</b>
Bachelor's degree	30,300	33,200	<b>63,500</b>	29,500	31,700	<b>61,200</b>
Master's degree	4,100	4,300	<b>8,500</b>	11,900	15,000	<b>26,900</b>
Doctoral or professional degree	2,400	2,800	<b>5,200</b>	5,200	5,700	<b>10,900</b>
<b>TOTAL</b>	<b>132,400</b>	<b>200,600</b>	<b>333,100</b>	<b>132,600</b>	<b>200,500</b>	<b>333,100</b>

However to be *competitive* in the job market, educational requirements become stricter. In this scenario, a high school diploma is the minimum level of education. Employers will need approximately 135,000 high school graduates. Another 71,000 jobs will require postsecondary training, 28,000 will require an Associate’s, 61,000 a Bachelor’s, and 38,000 a Master’s or higher.

**Software/IT**

The Software/IT sector provided 17,400 jobs in Portland Metro in 2014. Nearly three-quarters required a Bachelor’s degree. On the other end of the spectrum, less than one percent accepted less than a high school diploma. The sector is expected to add about 6,000 new jobs between 2014 and 2024. An additional 5,400 jobs will become open as people retire. Combined, employers will need to fill 11,100 job openings. Approximately 8,500 of these will require a Bachelor’s degree (75%), while 1,200 (11%) will require nothing more than a high

school diploma.

Software/IT Employment Growth by Typical Educational Requirements, 2014-2024

	2014	2024	Growth Openings	Replacement Openings	Total
Less than high school	100	100	-	-	-
High school diploma or equiv.	2,500	3,100	700	500	1,200
Postsecondary training	2,100	2,800	700	700	1,400
Associate's degree	100	100	-	-	-
Bachelor's degree	12,500	16,800	4,300	4,200	8,500
Doctoral or professional degree	200	200	-	-	-
<b>TOTAL</b>	<b>17,400</b>	<b>23,200</b>	<b>5,800</b>	<b>5,400</b>	<b>11,100</b>

**Advanced Manufacturing**

The Advanced Manufacturing sector provided about 63,000 jobs in Portland Metro in 2014. Nearly one-third required a Bachelor’s degree. On the other end of the spectrum, half required just a high school diploma, with another 10 percent requiring no diploma at all. The sector is expected to add nearly 9,000 new jobs between 2014 and 2024. Another 15,400 jobs will open up as people retire. Advanced Manufacturing has an older workforce than other industries; retirements will generate a considerable number of vacancies over the coming decade (15,400). Between economic growth and retirements, employers will need to fill 24,100 openings. Approximately 6,400 of these will require a Bachelor’s degree (26%), while 15,200 –nearly two-thirds of all openings- will require nothing more than a high school diploma.

Advanced Manufacturing Employment Growth by Typical Educational Requirements, 2014-2024

	2014	2024	Growth Openings	Replacement Openings	Total
Less than high school	5,700	6,500	800	1,900	2,700
High school diploma or equivalent	31,300	35,900	4,600	7,900	12,500
Postsecondary training (non-degree)	2,200	2,500	300	800	1,100
Associate's degree	4,300	4,700	400	1,000	1,400
Bachelor's degree	19,300	21,900	2,600	3,800	6,400
Doctoral or professional degree	100	100	-	-	-
<b>TOTAL</b>	<b>62,900</b>	<b>71,600</b>	<b>8,700</b>	<b>15,400</b>	<b>24,100</b>

**Health Care**

The Health Care sector provided nearly 67,000 jobs in Portland Metro in 2014. One-in-five required a Bachelor’s degree or higher (14,800). On the other end of the spectrum, one-third needed nothing more than a high school

diploma (22,700).

Health Care Employment Growth by Typical Educational Requirements, 2014-2024

	2014	2024	Growth Openings	Replacement Openings	Total
Less than high school	7,300	9,800	2,400	2,200	4,600
High school diploma or equivalent	15,400	19,700	4,300	5,600	9,900
Postsecondary training (non-degree)	15,300	19,700	4,300	4,100	8,400
Associate's degree	13,600	16,600	3,000	3,000	6,000
Bachelor's degree	5,000	6,300	1,300	1,600	2,900
Master's degree	3,100	4,100	1,000	800	1,800
Doctoral or professional degree	6,700	8,200	1,400	1,600	3,000
<b>TOTAL</b>	<b>66,400</b>	<b>84,400</b>	<b>18,000</b>	<b>18,900</b>	<b>36,600</b>

The sector is expected to add 18,000 new jobs between 2014 and 2024. Another 18,900 jobs will become vacant as people retire. Combined, employers will need to fill 36,600 job openings. Approximately 7,700 of these will require a Bachelor's degree or higher (21%), while 14,500 (40%) will require nothing more than a high school diploma.

**Construction**

The Construction sector provided nearly 39,000 jobs in Portland Metro in 2014. Over three-quarters required no more than a high school diploma (25,900). On the other end of the spectrum, fewer than 10 percent required a Bachelor's degree (2,900).

Construction Employment Growth by Typical Educational Requirements, 2014-2024

	2014	2024	Growth Openings	Replacement Openings	Total
Less than high school	8,100	10,600	2,500	1,400	3,900
High school diploma or equivalent	17,800	22,200	4,500	11,400	15,900
Postsecondary training (non-degree)	2,200	2,800	600	1,400	2,000
Associate's degree	1,800	2,200	400	200	600
Bachelor's degree	2,900	3,700	700	800	1,500
<b>TOTAL</b>	<b>32,800</b>	<b>41,500</b>	<b>8,700</b>	<b>15,200</b>	<b>23,900</b>

Construction is expected to add 8,700 new jobs between 2014 and 2024. As with Advanced Manufacturing, Construction has an older workforce relative to other industries; retirements will be a major factor over the coming decade with 15,200 jobs becoming vacant as people retire. Combined, employers will need to fill 23,900 job openings. Just 1,500 of these will require a Bachelor's degree or higher (6%), while 19,800 (83%) will require nothing more than a high school diploma.

1.3 An analysis of the local workforce, including current labor force employment (and unemployment) data, and information on labor market trends, and the educational and skill levels of the workforce in the region, including individuals with barriers to employment. [WIOA Sec. 108(b)(1)(C)]

Labor Force Trends

Portland Metro’s labor force – the sum of the employed and unemployed– reached an all-time high in 2015, at 722,600 residents. Approximately 35,400 of these labor force participants were unemployed and looking for work, translating into an unemployment rate of 4.9 percent.

The region’s labor force grew rapidly in the years following the dot-com recession, averaging 15,000 entrants annually between 2006 and 2011. Growth dropped off for several years following the Great Recession despite a solid jobs recovery, most likely due to retirements. Baby boomers who had delayed retiring during the recession when they saw their balance sheets take a hit now felt more financially comfortable doing so. Growth resumed in 2014, and since then the labor force has increased by 23,400 people.

Recently job growth has more than kept up with the thousands of people entering the labor force, and consequently the unemployment rate has declined. After peaking at 10.7 percent during the recession, representing 73,300 unemployed residents, it’s steadily declined to 4.6 percent (December 2015). On an annual basis, 2015 registered the lowest unemployment rate since 2007 and before that, 2000.

Characteristics of Workforce

- Education

Approximately 47,800 people (8%) in Portland Metro’s labor force (ages 25-64) have not completed high school. Another 98,300 (16%) have just a high school diploma. About 194,200 (31%) have an Associate’s degree or have some college education, and the remaining 281,100 people (45%) in the workforce hold a Bachelor’s degree or higher.

The region’s workforce has become more educated over time. The number and share of people with a high school diploma or less has declined from 155,400 (29% of the workforce) in 2005 to 146,100 (24%) in 2014. At the same time, the number and share of workers with a Bachelor’s degree or higher has increased, from 214,900 (40%) to 281,100 (45%).

- Skills

There is little information about the work skills held by adults in Portland Metro, but the National Career Readiness Certificate (NCRC) program offers an optional, self-selected test of mathematics, reading, writing, and locating information. It is commonly offered to high school students and people seeking employment services. The certificate shows four levels of ability: platinum (the highest), gold, silver, and bronze (the lowest). The NCRC is part of a program to certify communities as being work ready. This is primarily determined by the level of participation of workers and employers. Both Multnomah and Washington counties have nearly reached their respective goals.

	National Career Readiness Certificates Awarded, January 2012 - January 2016										
	Bronze		Silver		Gold		Platinum		Total	% of Goal	
	#	%	#	%	#	%	#	%	#	Goal	Attained
Portland Metro	1,209	13%	4,826	51%	3,335	35%	103	1%	9,486	4,270	222%
Multnomah County	770	14%	2,880	52%	1,810	33%	48	1%	5,516	2,523	219%
Washington County	439	11%	1,946	49%	1,525	38%	55	1%	3,970	1,747	227%

**Barriers to Employment: Understanding the Supply-Demand Divide**

Education: A lack of education can be a significant barrier to employment. Nearly 10 percent of Portland Metro’s population (ages 25-64) lacks a high school diploma, or 70,300 people. For those who are in the labor force

(47,800), 7,200 can't find work. In other words, the unemployment rate for people lacking a high school diploma is 15.1 percent; nearly triple that of people with a high school diploma or more.

Language: People have barriers to employment aside from insufficient education. Most jobs require the ability to speak English. Although most residents in Portland Metro do speak English, about 6 percent of the population ages 18-64, or 51,500 people, say they speak it "not well" or "not at all" (2014).

Disability: Having a disability also constitutes a barrier to employment for many people. Approximately 94,600 Portland Metro residents indicated they had a disability (2014). About half of them were in the labor force (46,200); 8,400 of who were unemployed. This translates into an unemployment rate of 18.2 percent. It's possible that some of the 48,400 people with disabilities who are currently not working or looking for work might enter the labor force given the right circumstances.

Criminal History: A criminal history can also be a barrier to employment. There are no administrative counts or survey estimates of the number of ex-offenders in the region. A national study published by the Center for Economic and Policy Research estimated that in 2008 about one in 33 working-age adults was an ex-prisoner, and about one-in-15 was an ex-felon.

The Multnomah County Adult Services Division (ASD) supervises over 10,000 adults sentenced to probation or released from custody on parole. Washington County's Probation and Parole Division supervises approximately 4,100 offenders.

Childcare: Single parents can experience difficulty holding down a job while caring for children full-time. There are more than 40,000 single-parent households in Portland Metro (out of 523,200). Roughly two-thirds are single mothers, one-third are single fathers.

Veterans: Veterans also face barriers to employment. Studies cite the lack of preparation for finding a civilian job; unrealistic expectations surrounding the kind of work and salary for which they qualify; unaddressed mental health issues; and difficulties adapting to civilian work culture as reasons. There are about 43,000 veterans in Portland Metro, 32,000 of whom are in the labor force. Of these, 3,400 are unemployed for an unemployment rate of 10.7 percent.

Long-term Unemployment: Even with a growing economy, Oregon and the nation still face the challenge of long-term unemployment. Studies show that employers are less willing to hire people who have been unemployed for a significant length of time, and often for reasons unrelated to the applicant's qualifications. In Oregon, the number of people who have been unemployed for 27 weeks or longer averaged 24,000 in 2015; 21 percent of total unemployment.

Youth: Young people traditionally have had more difficulty finding work compared to older age groups. The recession hit youth harder than other age groups, and they have yet to fully recover. Approximately 8,400 young people (ages 16-24) were unemployed and looking for work in Portland Metro (2014), translating into an unemployment rate of 15.5 percent; two-and-a-half times higher than the rate for those 25 years of age and older.

1.4 An analysis and description of adult and dislocated worker workforce development activities, including type and availability of education, training and employment activities. Include analysis of the strengths and weaknesses of such services, and the capacity to provide such services, in order to address the needs identified in 1.2. [WIOA Sec. 108(b)(1)(D) & 108 (b)(7)]

Worksystems convenes partners, designs programs, coordinates services, and invests funds to help job seekers acquire the skills they need to support themselves and to meet the staffing needs of regional industry. The region's public workforce development system - WorkSource Portland Metro (WSPM) - serves as our primary investment vehicle and we provide oversight to ensure the highest quality services.

Five WorkSource Portland Metro centers serve over 90,000 Adult and Dislocated Workers annually, including three centers in Multnomah County and two in Washington County. WIOA 1-B service providers and Oregon Employment Department staff are co-located at every center, delivering an array of services consistent with the WorkSource Oregon Standards. Worksystems has identified Manufacturing, Healthcare, IT/Software and Construction as target sectors. Services available at all centers include:

- Career Exploration
- Computer-aided English Language Learning
- Employment Referral Services
- GED and Adult Basic Education
- Interview Workshops
- Job Clubs
- Job Search Assistance
- Job Search with Social Media
- Occupational Skills Training
- On-the-Job Training
- National Career Readiness Certification
- Resume Workshops
- Self-Paced e-Learning Lab
- Workplace Computer courses

An array of locally developed service strategies are used to increase the quality and results of services through innovation, collaboration, and technology. These include:

- The Columbia-Willamette Workforce Collaborative – A partnership between Worksystems, Clackamas Workforce Partnership and Southwest Washington Workforce Development Council to support and develop regional talent.
- TalentLink – A six-step process for validating the work-ready skills of WorkSource customers, resulting in prioritized job search and placement services for those who become fully certified.
- Career Mapping – Assistance for barriered populations to identify goals, address and remedy obstacles, and create Career Plans that help them meet their goals.

- Aligned Partner Network – Partnership between WSPM and community agencies to leverage each agency’s expertise to move targeted populations with multiple employment barriers into career-track employment. This model provides career coaching, liaison support, career mapping, connection to WorkSource services and set-aside resources in occupational training and work experience.
- SummerWorks – A public/private partnership that provides a paid work experience for area youth.
- Career Connect Network – A group of 9 agencies that provide support and services to help disadvantaged at-risk youth achieve career goals and develop the necessary life skills to stay on course.
- Sector Bridge Courses – Programs designed to provide a bridge between basic self-sufficiency and care awareness to career-pathway employment in advanced manufacturing, health care, construction and IT/software occupations.
- Oregon Connections - Web-based tool that connects industry professionals to the K-20 system to help youth and educators connect their lessons to the world of work.
- WorkSource Symposia - Half to full-day events providing middle-skill to high-skill job seekers with job search assistance and networking opportunities to facilitate employment.
- WorkSource Express - A limited extension of WorkSource services offered to customers at identified locations outside of the main WorkSource centers.
- Connect to Work for Ex-Offenders - Person-first placement services for targeted WorkSource Portland Metro customers who identify as ex-offenders.
- My WorkSource - A personalized website for customers to manage their WorkSource activities by signing up for workshops, accessing job search tools and connection to iMatchSkills.
- Code Oregon – A program to provide broad access to low-cost online training in a variety of coding languages with additional job placement support after completion.
- Train Oregon – An online training portal (launching Spring 2016) that provides free access to an array of content including GED prep, soft skill enhancement, and industry-specific coursework.

Approximately 50,000 people annually engage in skill development services provided through WorkSource Portland Metro. During the past year, 35,000 job seekers participated in training workshops, 3,000 in basic education, GED, math or English, 3,000 in computer literacy courses, and over 2,000 participated in occupational-specific training. Also, over 240,000 log-ins were made to access online career development tools (see above).

Of 42,000 people completing services last year, 26,700 (63%) obtained employment at an average wage of \$18.45 per hour.

### **Partnership is the Key**

We are continually working to integrate workforce programs and services funded by other partner agencies into the public system to align resources, increase efficiency, and generate better outcomes for job seekers. Through the creation of the Aligned Partner Network, we have strategically connected over 20 community agencies to training and employment services for their clients through WSPM while leveraging each agency's expertise in providing the necessary support to maximize successful participation in our programs. We believe that this aligned approach helps move people into career-track employment through a coordinated progression of services and resources.

In addition to the foundational services provided through WSPM, Worksystems has secured a great deal of federal, state, municipal, and private funding and implements these as programs and services that are integral to the local public workforce system. These additional resources greatly exceed the WIOA “formula funds” and are key to providing comprehensive and robust services, including a focus on occupational training in target sectors as well as services to target populations.

Partnerships are also key to maintaining robust and seamless services. Over 30 service providing organizations, including state agencies, community colleges, nonprofits, and local public agencies are engaged in a team approach around the local public workforce system.

**Strengths Include:**

- Very strong level of systems integration between WIOA 1-B, Oregon Employment Department. All staff are co-located at all WSPM Centers and working as part of a common team effort. Programs such as TalentLink and Back to Work Oregon demonstrate a high degree of coordination and team environment across organizations and Centers.
- Very strong level of systems alignment between community-based and local public agency partners focused on vulnerable populations and services offered through WorkSource Portland Metro. Over 2,000 customers are co-enrolled and jointly served by over 20 local partner organizations who are proving that services and results are better when we work together.
- Resource development has been very successful and non-WIOA funded services are invested through WorkSource Portland Metro, which more than doubles the amount of resources and services available in the public workforce system. The current annual amount of non-WIOA funds is over \$10 million.
- System wide staff training is being implemented to support high quality services and shore up communication and a systems approach across Centers, teams and organizations. Over 200 staff participated in locally delivered trainings over the past 12 months.
- Most WorkSource Centers are recently renovated to support an excellent customer service environment and a robust menu of seamless services.

**Weaknesses Include:**

- Leadership changes within key partners at both the State and local levels has affected continuity and progress.
- Several Core Partner programs, including TANF, SNAP, Vocational Rehabilitation and Adult Basic Education are not fully integrated with WorkSource Oregon and there is a lack of state level policy to support this effort. The framework of integrated state leadership, joint governance, and joint policy is essential to achieving further alignment and improved services. Worksystems will continue to engage

locally to align additional partners with WorkSource Portland Metro, but State clarity and support is essential.

- Programmatic separation between the youth and adult systems has resulted in missed opportunities to leverage partnership, employers, expertise, resources, and program infrastructure.
- The facility at WSPM East has not been renovated in many years. Improvements are needed to provide an excellent customer service environment and a robust menu of services.

#### **Next Steps:**

- Increase focus on the Construction sector, particularly with respect to equity and participation of women and people of color in the construction trades.
- Develop processes and procedures to ensure that the new WSPM Regional Business Services team prioritizes customers that are in a skill validated talent pool, enrolled in grant or WIOA funded sector occupational training and/or target populations from partner agency referrals.
- Build stronger ties between Core WIOA programs and WSPM to address the needs of target populations, including those with disabilities and low basic skills.
- Launch a WorkSource Express Center in the Washington County jail to build seamless service delivery for ex-offenders re-entering the community. WorkSource services will be delivered both pre and post release.
- Develop a Memorandum of Understanding and Regional Leadership Team structure that incorporates Core WIOA Programs.
- Work with the City of Gresham and other partners to move WSPM East to the Rockwood Rising Development (relocation expected October 2017).

1.5 An analysis and description of youth workforce activities, including activities for youth with disabilities. Identify successful models and best practices, for youth workforce activities relevant to the local area. [WIOA Sec. 108(b)(9)]
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In Multnomah and Washington Counties, there are 15,600 youth aged 16-24 years who are not in school and do not have a HS diploma/GED. Of these, 98% are very low-income or living in low-income families defined as 70% of the US Department of Labor's Lower Living Standard Income Level which is at or under \$11,000 for an individual or \$26,500 for a family of four. Without re-engaging in education, the lifelong employment prospects for these youth are bleak. In addition, opportunities to explore careers and get basic work experience are far more limited for today's youth than in the past.

Worksystems invests funds to support disconnected, low-income youth, ages 16 – 24 (referred to as Opportunity Youth) through a system of 9 service providers known as the Career Connect Network (CCN). The CCN has expertise in serving a diverse spectrum of youth including homeless, LGBTQ, English-language learners,

pregnant/parenting, youth with disabilities and a variety of culturally specific populations. The youth served by our resources are at risk of or currently disconnected from school or work or both. Community Colleges and community based organizations also provide services to serve these disconnected youth.

Our investments prepare Opportunity Youth for successful careers through continuing education and work-based learning opportunities. This is accomplished through a robust continuum of career exploration activities, academic remediation, career coaching, work readiness training and hard/soft skill building. Youth work in groups and 1-on-1 with skills trainers and career coaches to develop an individualized plan to pursue their career goals. CCN youth receive up to 3 years of services that bridge the completion of their secondary credential on to post-secondary education/training or career pathway employment. This systemic approach is built on common definitions of college and career readiness based on competency development in five core areas: self-management, proactive-communication and collaboration, reliability, taking initiative, and academics (reading and math).

### **Work Experience**

Youth need opportunities to learn critical workplace skills that can only come through real work experience. Yet only 1 in 4 teens are able to find employment and the outlook for youth of color is more dire. Even as the economy has improved youth still face difficulty finding a first job. Missing out on early work experiences can have long-term negative effects on employment and lifetime earnings. In response, we focus significant time and resources to support meaningful, paid work experiences to help young people develop the skills necessary to succeed in today's world of work. Youth learn new skills in a real work environment, connect with supportive adults, and build an employment history.

We offer work experience for youth in two ways:

SummerWorks is a long-running, successful summer youth employment program. Through SummerWorks, we expand the number of employment opportunities to serve a broader population of youth referred by high schools and community organizations across the region. Since 2009, the program has put 3,775 youth to work.

WEX-Y are year-round paid work experiences available to youth engaged in the CCN.

### **Next Steps:**

The new WIOA legislation requires that 75% of funding is targeted to youth who are out-of-school. This definition includes youth who have dropped out of high school or those who have received a diploma/GED that are not attached to the labor force or attending post-secondary education or training. The 75% funding requirement will have an impact on our CCN partners who have more traditionally focused on an at-risk in-school population. WIOA also now allows services for young people up to the age of 24. These changes will set the direction for how our youth service system will evolve over the coming years.

Alignment with WSPM: Youth ages 16-24 can be served through our CCN programs and those 18 and up can also be served through WSPM. We are working to create clear referral protocols so partner agencies know when a youth would be best served through WSPM or when he/she may need the additional support provided by a CCN partner.

Sector Bridge Programming: It is projected that approximately 79% of all jobs in Oregon will require education beyond high school by 2018. The majority of the projected job growth will be in middle skill jobs or jobs that require education and training beyond high school but less than a bachelor’s degree. This is juxtaposed against a backdrop of almost a third of our students failing to graduate with a regular diploma after four or even five years in high school. Similarly, post-secondary persistence rates are low for first generation college students.

Worksystems’ Sector Bridge Programming provides industry-specific training to help youth gain the education, skills and credentials needed for employment in high-wage, high-demand occupations within one of four target sectors: Advanced Manufacturing, Health Care, Construction or IT/Software. Each Sector Pathway will be comprised of a Career Exploration Course, a Bridge Course focused on a single industry and a Career-Pathway Internship.

Oregon Connections: Building a pipeline of qualified future workers is a primary issue of concern for employers in our region. Worksystems has invested in tools and partnerships to help inform young people about opportunities in our targeted industries and to connect youth with employers. Oregon Connections is the next generation, web-based tool that makes it easy for industry professionals to connect with K-20 educators. Through in-person matches and virtual sessions, professionals can help youth and educators connect their lessons and learnings to the world of work.

## Section 2: Strategic Vision and Goals

2.1 Provide the board’s vision and goals for its local workforce system in preparing an educated and skilled workforce in the local area, including goals for youth and individuals with barriers to employment. [WIOA Sec. 108(b)(1)(E)]
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To support a thriving economy, our region needs competitive companies, productive people and innovative ideas. To that end, we must work together across agencies and organizations to create new models for skill development and career advancement. We need to build industry partnerships to address mismatches between labor market supply and regional industry needs. And, we must take advantage of past successes to evolve the regional workforce development system to function more cohesively with shared purpose, customers and goals.

Beginning with a joint Workforce Development Board and State planning session in July 2015, a wide variety of partners and stakeholders have given their time and input into casting a vision for the regional workforce system and developing the goals and strategies found in the State and local plans. See Attachment E for a list of participants. We are extremely grateful for the contributions of these individuals and their represented organizations and look forward to continuing to work together to implement our workforce plan.

Through a series of community forums, we have finalized the following:

**Mission:** To coordinate a regional workforce system that supports individual prosperity and business competitiveness.

**Vision:** Employers have qualified employees and both current and future workers have the skills and support they need to successfully engage, advance and succeed in the labor market.

**Guiding Principles:** Collaboration – Equity – Accountability – Inclusiveness – Relevance – Excellence

## Goals:

1. The regional workforce system is aligned, provides integrated services, efficiently uses resources, and continuously improves to deliver outcomes for employers and job seekers.
2. Employers can find the regional talent they need to grow and remain competitive.
3. Regional workers, particularly low-income and other underserved residents including those receiving public assistance, those with low basic skills and communities of color, have the skills and support they need to fill and retain current and emerging quality jobs.
4. Youth have the academic and work competencies required by regional employers.

In addition, Worksystems has worked with the Southwest Washington Workforce Development Council and the Clackamas Workforce Partnership under the umbrella of the Columbia-Willamette Workforce Collaborative (CWWC) to align goals and to establish a partnership to support and develop regional talent.

2.2 Describe how the board's vision and goals align with and/or supports the vision of the Oregon Workforce Investment Board (OWIB):

A strong state economy and prosperous communities are fueled by skilled workers, quality jobs and thriving businesses.

The recent recession taught us a lot about the strengths, resiliency and potential of the state and regional economy. After emerging from the recession, the Portland region has produced 67,000 jobs – the 5<sup>th</sup> fastest in the nation. In addition, Oregon's Gross State Product, which is primarily driven by the Portland metro area, has grown by 4.4% since 2009 which is nearly double the nation's average growth for the same time period.

Yet despite this picture of economic success, many families would tell a different story. The most recent census data shows that more than 330,000 people in the Portland region live in poverty. Over 35,000 are unemployed and thousands more work full-time but can't make ends meet because of low-wages, insufficient skills and few prospects for career and wage advancement. The reality is that recent changes in the regional economy have left less educated workers further behind and increasingly unable to secure steady work at family-supporting wages.

At the same time, regional employers that offer high quality jobs in industries such as health care, software/IT and manufacturing are facing a shortage of skilled workers. The net effect of this divide – unskilled regional residents struggling with insufficient, stagnating wages on the one hand, and employers grappling with a shortage of skilled labor to drive productivity and growth on the other – is a significant missed opportunity to strengthen our labor market and support our growing economy.

Worksystems' focus is to help bridge the supply-demand divide and ensure all residents have the opportunity to fully participate in the region's growing economic success. We are determined to broaden opportunity to our diverse people and communities and to foster a stronger and more equitable future for our region and ultimately our state.

The Governor and the Oregon Workforce Investment Board laid out a statewide road map for the workforce system to capitalize on its strengths, identify and address obstacles, and promote continuous improvement of services through actionable recommendations. Our intent is to build upon the State's vision by providing the

framework to guide implementation at the local level. Our goals and strategies begin to translate this vision into local action and support the continued development of a workforce system that adds maximum value to our regional workers, employers, and economy.

<p>2.3 Describe how the board’s vision and goals contributes to each of the OWIB’s goals:</p> <ul style="list-style-type: none"> <li>• Create a customer-centric workforce system that is easy to access, highly effective, and simple to understand.</li> <li>• Provide business and industry customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers.</li> <li>• Invest in Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.</li> <li>• Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers.</li> </ul>
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Worksystems has aligned our local goals with those of the OWIB as noted below.

OWIB Goal 1: Create a customer-centric workforce system that is easy to access, highly effective, and simple to understand.	Worksystems Goal 1: The regional workforce system is aligned, provides integrated services, efficiently uses resources, and continuously improves to deliver outcomes for employers and job seekers.
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Worksystems’ initial strategies to support these goals:

- Build relationships across organizations that provide workforce related services to break down barriers, increase access to services and improve results.
- Align and leverage resources (data, funding, staff, etc.) to collectively improve outcomes and collaboration.
- Market system services and encourage information sharing across organizations.

OWIB Goal 2: Provide business and industry customized workforce solutions to prepare and deliver qualified and viable candidates and advance current workers.	Worksystems Goal 2: Employers can find the regional talent they need to grow and remain competitive.
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Worksystems’ initial strategies to support these goals:

- Work with industry to better understand and define training needs.
- Collaborate across program and jurisdictional boundaries to build employer partnerships and address skill shortages.
- Build awareness among businesses about the public workforce system.
- Pursue and invest resources to address mismatches between industry needs and labor supply.

OWIB Goal 3: Invest in Oregonians to build in-demand skills, match training and job seekers to opportunities, and accelerate career momentum.	Worksystems Goal 3: Regional workers, particularly low-income and other underserved residents including those receiving public assistance, those with low basic skills and communities of color, have the skills they need to fill current and emerging quality jobs.
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Worksystems' initial strategies to support these goals:

- Provide coordinated access to a variety of tools, services and resources that accelerate job attachment, career advancement and increased earnings.
- Actively reach out and engage customers in education, training, and entrepreneurial opportunities with a focus on low-income and underserved populations and those experiencing other barriers to employment.
- Rethink and restructure training and skill development to include innovative approaches to career track employment and advancement.

OWIB Goal 4: Create and develop talent by providing young people with information and experiences that engage their interests, spur further career development, and connect to Oregon employers.	Worksystems Goal 4; Youth have the academic and work competencies required by regional employers.
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Worksystems' initial strategies to support these goals:

- Facilitate employer engagement in youth development services and activities.
- Increase the number and quality of work-based learning opportunities.
- Re-engage disconnected youth in education and training opportunities.
- Work with partners to remove and overcome barriers to employment or education for underserved youth.

2.4 Describe how the board's goals relate to the achievement of federal performance accountability measures. [WIOA Sec. 108(b)(1)(E)]

**Federal performance accountability measures:**

All of the proposed goals support the achievement of the federal performance measures. Since our inception in 1998, Worksystems and its regional partners have consistently met or exceeded all federal performance requirements. Below is a snap-shot of WSPM and CCN federal performance achievement for July 1, 2014 – June 30, 2015 (PY 2014) and July 1, 2015- December 31, 2015 (the first 2 Quarters of PY 2015):

Performance Measures and Goals		PY 2014		PY 2015 Q2	
		Actual	Goal	Actual	Goal
<b>Entered Employment Rate</b>					
	Adults	61.6%	56.5%	62.4%	56.5%
	DW	61.8%	56.5%	63.1%	56.5%
<b>Employment Retention Rate</b>					
	Adults	85.4%	84.0%	85.3%	84.0%
	DW	85.4%	84.0%	85.7%	84.0%
<b>Six-month Average Earnings</b>					
	Adults	\$16,201	\$15,200	\$16,612	\$15,200
	DW	\$16,774	\$15,300	\$17,449	\$15,300
<b>Placement in Employ/Education</b>					

Performance Measures and Goals		PY 2014		PY 2015 Q2	
		Actual	Goal	Actual	Goal
	Youth	78.3%	78.0%	78.5%	78.0%
<b>Attainment of Degree/Certificate</b>					
	Youth	67.8%	72.0%	62.3%	72.0%
<b>Literacy/Numeracy Gains</b>					
	Youth	57.7%	43.0%	66.0%	43.0%

### Section 3: Local Area Partnerships and Investment Strategies

3.1 Taking into account the analysis in Section 1, describe the local board’s strategy to work with the organizations that carry out core programs to align resources in the local area, in support of the vision and goals described in Question 2.1. [WIOA Sec. 108(b)(1)(F)]

Worksystems and the Oregon Employment Department have made significant progress to align resources and integrate services through the WSPM system. In 2008, in accordance with policy requirements issued jointly by Oregon Employment Department and the Oregon Department of Community Colleges and Workforce Development (the “Compass Policy”), Worksystems coordinated the implementation of an “Integrated Service Delivery” model of providing one-stop services which operationally merged the WIOA 1-B, Wagner-Peyser and several other OED managed programs. Consequently, WIOA 1-B and Oregon Employment Department staff are co-located in all five WorkSource Portland Metro centers. The programs, staff, and organizations that make up WorkSource Portland Metro all work together as an integrated team to serve a “common customer,” striving toward the ideal that our programs and services are organized around our customers, and that our organizational and bureaucratic divisions are invisible and seamless to our customers. To support coordination and communication within this multi-partner, multi-center "integrated" system, we established a Local Leadership Team structure that includes management from all integrated, onsite partners. It is anticipated that all core partner agencies will participate in the Local Leadership structure moving forward.

The current structure is:

1. Regional Leadership Team: An agency-level meeting between Worksystems and OED, established to oversee the integration of Oregon Employment Department and WIOA 1-B funded services at the regional level.
2. WorkSource Management Team: A joint management forum of all co-located, “integrated” partners within the WorkSource Portland Metro system established to ensure that all Centers are working together as a system and all programs and initiatives are seamlessly integrated.
3. Center Leadership Teams: Center-level meetings of onsite partners to manage operations and ensure that partners, programs, and initiatives are integrated.

In addition, the following partners are either directly participating in the delivery of “co-located” services offered through WorkSource Portland Metro centers or are part of a growing array of community-based and public agency partners who are integrally connected to the public workforce system:

Career Enlightenment, LLC  
Catholic Charities  
Cascade AIDS Project  
Central City Concern  
CODA  
Community Action  
Constructing Hope  
Construction Apprenticeship and Workforce Solutions  
Easter Seals  
Experience Works  
Goodwill of the Columbia Willamette  
Home Forward  
Housing Authority of Washington County  
Human Solutions  
Immigrant and Refugee Community Organization  
Impact NW  
Job Corps  
Labor's Community Service Agency  
Mercy Corps  
Metropolitan Alliance for Workforce Equity  
Mt Hood Community College  
Multnomah County Department of Community Justice  
Multnomah County Department of Human Services  
NARA  
Native American Youth and Family Center  
Neighborhood House  
Oregon Department of Human Services  
Oregon Employment Department  
Oregon Tradeswomen  
Portland Community College  
Reach CDC  
SE Works  
Self-Enhancement, Inc.  
Washington County Department of Community Justice

**Next Steps:**

Over the course of this plan, Worksystems will work with Core and other regional partners to:

- Refine the regional leadership structure to systemically engage Core program partners.
- Develop a Memorandum of Understanding (MOU) that defines roles and responsibilities for Core Programs in accordance with WIOA.
- Implement a five-year, \$12M Department of Health and Human Services grant to provide training in a variety of health occupations and job placement assistance for TANF and SNAP clients.

- Implement a “SNAP 50/50” matching grant providing additional resources to enhance and expand training and employment services to SNAP recipients served through WSPM
- Coordinate focused support for DHS’s clients identified as Able-Bodied Adults Without Dependents (ABAWD) who are referred to WSPM for services.

3.2 Identify the programs/partners that are included in the local workforce development system. Include, at a minimum, organizations that provide services for Adult Education and Literacy, Wagner-Peyser, Vocational Rehabilitation, Temporary Assistance for Needy Families, Supplemental Nutritional Assistance Program, and programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006. [WIOA Sec. 108(b)(2)]

In accordance with State requirements, this Plan includes the following programs:

- Adult Program (Title I of WIOA)
- Dislocated Worker Program (Title I)
- Youth Program (Title I)
- Adult Education and Family Literacy Act Program (Title II)
- Wagner-Peyser Act Program (Wagner-Peyser Act, as amended by Title III)
- Vocational Rehabilitation Program (Title I of the Rehabilitation Act of 1973, as amended by Title IV)

Although not technically Core WIOA Programs, the State Plan adds the following: *“TANF and SNAP are mandatory partners and services will be accessible in the one-stops. Oregon has chosen to submit a Unified Plan at this time, although language in the plan and communications from the OWIB and the Governor outline expectations that the workforce system includes the self-sufficiency programs at DHS.”* Accordingly, TANF and SNAP are included as part of this Plan.

The purpose of this Plan is to set the requirements and parameters for the work that must be undertaken at the local level to comply with state expectations and the Workforce Innovation and Opportunity Act (WIOA). Section 678.420 of WIOA implementing regulations says: *“Each required partner must: (a) Provide access to its programs or activities through the one-stop delivery system.”* WorkSource Portland Metro is the region’s one-stop delivery system.

3.3 Describe efforts to work with partners identified in 3.2 to support alignment of service provision to contribute to the achievement of OWIB’s goals and strategies. [WIOA Sec. 108(b)(2)]

Our region has achieved a very strong level of systems integration between WIOA Title 1 and WIOA Title III in accordance with the Compass Policy issued jointly by the Oregon Department of Community Colleges and Oregon Employment Department in 2008. All staff are co-located at WSPM Centers and working as part of a common team effort in accordance with WIOA and the WorkSource Oregon standards. The Local Leadership Team reflects this integrated service delivery environment (see section 3.2) and programs such as TalentLink and Back to Work Oregon demonstrate a high degree of coordination and team environment across organizations and Centers (see section 1.4).

With Portland Community College and Mt Hood Community College (both community colleges within the region) serving as “integrated” partners within WorkSource Portland Metro, we are positioned very strongly to support alignment of service provision to contribute to the achievement of OWIB’s goals and strategies related to WIOA Title II. To this end, Worksystems is participating in a statewide alignment committee convened by the Oregon Department of Community Colleges and Workforce Development (Moving Pathways Forward) tasked with developing a plan of action to reflect the program and performance expectations of WIOA and to support the successful transition of Title II students to post-secondary classes or work. Worksystems will also ensure that local applications submitted under WIOA Title II Adult Education and Literacy are consistent with the local plan and state provided criteria as described in section 3.5 of this plan.

Also, to support the requirements of WIOA, Worksystems is engaged in a process initiated by the State level leadership of Department of Community Colleges and Workforce Development, Oregon Employment Department, Department Vocational Rehabilitation, and Department of Human Services to increase alignment and integration of core partners within WorkSource. The goal of this effort is to build on the WorkSource alignment effort, beyond the initial “Service Integration” of OED and WIOA 1-B, to include WIOA Title IV, WIOA Title II, Vocational Rehabilitation, and DHS.

Another major area of focus is the development and implementation of competitive grant funding to advance the agenda of aligning services in a team effort around WorkSource Portland Metro. Of the approximately \$10M in competitive funding Worksystems deploys through the system every year, nearly all is based on sector-strategies and/or efforts to increase alignment of service provision, including WIOA Title 1-B, OED, TANF, SNAP, Medicaid, community development (CDBG), municipal employment programs, adult basic education, veterans services, Public Housing Authorities, community corrections, and apprenticeship programs.

3.4 Describe strategies to implement the WorkSource Oregon Operational Standards, maximizing coordination of services provided by Oregon Employment Department and the local board’s contracted service providers in order to improve services and avoid duplication. [WIOA Sec. 108(b)(12)]
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WorkSource Portland Metro served as the model for the development of the WorkSource Oregon (WSO) Operational Standards. The Worksystems Executive Director is a member of the Statewide Standards Leadership Team and several staff actively participate on State level work groups.

Since 2008, Worksystems staff and the Oregon Employment Department’s Area Manager, referred to as the Local Leadership Team, have worked closely together through a coordinated and collaborative management structure to ensure alignment of efforts, identify opportunities and solve system-wide and center-level problems.

Using the Local Leadership Team structure, we will create strategies to collaborate with WorkSource staff to implement WSO Standards and services. Five workgroups will be formed by April 1, 2016:

1. Exploratory Services Workgroup
2. Career Services Workgroup
3. Training Services Workgroup
4. Business Services Workgroup
5. Professional Development Workgroup.

By May 2016, each group will develop and recommend regional policies and procedures to provide services in accordance with WSO Standard requirements. These recommendations will be reviewed by the Regional Leadership Team for final approval. This will ensure all WSO Standard requirements are met and there is no duplication of effort. Once approved, the Professional Development Workgroup will then be tasked with training WorkSource staff on the new policies and procedures. Full implementation of all WSO Standards will take place by June 30, 2016.

3.5 Identify how the local board will carry out a review of local applications submitted under WIOA Title II Adult Education and Literacy, consistent with the local plan and state provided criteria. [WIOA Sec. 108(b)(13)]

The local board is required to determine whether local applications to provide adult education and literacy programs under Title II are consistent with the local plan and make recommendations to the Title II agency to promote alignment with the plan. Our vision for alignment of Title II activities within the one-stop delivery system is that low-skilled adults have access to Title II-supported skill-building activities (reading, math, English language) at WorkSource Centers that prepare them for advanced education and training opportunities leading to industry credentials and/or directly to employment.

Worksystems will work with CCWD and local providers of Title II adult education to promote alignment through adoption of the following strategies: concurrent enrollment, prioritization of WorkSource customers in Title II funded programs, delivery of applicable career services at one-stop centers including outreach, intake, and assessment for Title II programs, delivery of some Title II services at WorkSource Centers, co-development and co-funding of innovative service delivery strategies that might include industry- and/or workplace-contextualized basic literacy and ESL offerings, accelerated basic skill offerings, and concurrent basic skill/occupational skill training. Worksystems will review local applications for inclusion of these strategies.

3.6 Describe efforts to support and/or promote entrepreneurial skills training and microenterprise services, in coordination with economic development and other partners. [WIOA Sec. 108(b)(5)]

Worksystems partners with Portland Development Commission’s Neighborhood Prosperity Initiative (NPI) and other local partners to support entrepreneurial skills and microenterprise services. NPI is focused on neighborhood-based community economic development involving an array of technical assistance, training and grants for local businesses. We worked with Portland Development Commission to develop cross-referral processes between workforce and microenterprise for all partners within Portland Development Commission’s Neighborhood Prosperity Initiative and Main Street Networks.

3.7 Describe how the local board coordinates education and workforce investment activities with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services. [WIOA Sec. 108(b)(10)]

Worksystems has closely coordinated with secondary high school and alternative programs. Of the 9 CCN service providers 7 are programs housed within school districts/community colleges and are licensed alternative high schools. Within Portland Public Schools (PPS) alternative school network we contract with New Avenues for Youth, PortlandOIC Rosemary Anderson, Portland YouthBuild and Native American Family Services. We also contract directly with PPS for a reconnection specialist to connect youth to one of the alternative school programs listed above. PortlandOIC Rosemary Anderson and Project YESS at Mt Hood Community College are alternative high school/GED programs for the 5 East County school districts. In Washington County we are contracted directly with Hillsboro School District (HSD) to provide CCN services to youth within HSD and the Beaverton School District. Our southern Washington County provider, OHDC, is the primary youth service support agency for the Tigard-Tualatin School District's HUB Academy which provides secondary education services to youth who have been expelled from their local high school.

Worksystems staff are members of the Tri-County School to Work Consortium, All Hands Raised Collective Impact Initiative, Opportunity Youth Collaborative, and the Portland Metro STEM Partnership. A primary goal for engagement with these groups is to ensure alignment, cooperation and coordination within secondary and post-secondary education efforts.

Oregon Connections is a system that helps streamline career exploration requests from schools and teachers while providing a vehicle for business volunteers to "opt-in" to a defined set of volunteer activities like job shadows, guest speakers, and mock interviews. We have partnered with career and college transition counselors and teachers to bring business volunteers via this tool into their classrooms to help students explore the world of work. Our engagement with school-to-work initiatives and STEM collaboratives has been key in the development and expansion of this tool.

Worksystems has a long and deep partnership with the region's community colleges – Portland Community College (PCC) and Mount Hood Community College (MHCC). Since 1998, our community colleges have served as the primary providers of career development and professional education services in WSPM. Together, we have trained and placed tens of thousands of local residents and built a system that is responsive to the needs of regional workers and employers.

### **WorkSource Portland Metro**

College staff, supported by contracts with Worksystems, provides direct services in 4 of the region's 5 WorkSource Centers to help job seekers reconnect with the labor market or move-up in their careers. Typical in-center services delivered by college staff include: career planning, work readiness training, academic skill development, workshop facilitation, job retention and other support services.

Professional education services and occupation specific skill development are also offered through scholarships and customized training usually delivered by the colleges either on a college campus or an employer worksite.

WorkSource Portland Metro Beaverton-Hillsboro is actually housed on the PCC Willow Creek campus and served more than 20,000 people last year.

Over the years, Worksystems and the Colleges have worked together on several key programs and strategies:

**Career Pathways:** Worksystems was the initial funder and key partner in the development of career pathways. Today, Career Pathways are available throughout the State of Oregon and are recognized nationally as an effective model to enable low-income individuals to secure a job or advance in a demand industry or occupation.

**Manufacturing Foundations:** Worksystems was the initial funder and key partner in the development of Manufacturing Foundations, a short-term occupational training program that incorporates up-front industry engagement leading to very high employment rates for training completers. Employers contribute to the cost of these programs, are involved in the design, and engaged in the selection of students who go through training. The employers then interview program graduates, leading to employment for most students.

**Entry Level High Tech:** Worksystems was a key funder and partner in the development of this seven week micro-electronics training program that provided instruction to English as a Second Language participants. Students from WorkSource were trained in communication skills, diversity in the workplace, safety, quality, workplace math and measurements, blueprint reading, and soldering. At the end of the course, students were interviewed by partner companies resulting in 87% being hired into full time employment. Partner companies were Merix, Benchmark, Vanguard EMS, and Matsushita.

**Genentech Recruitment:** Working with regional economic developers, Worksystems and the colleges worked together to develop and deliver new curriculum, students and workers to support the new Genentech facility in Hillsboro, OR. This was the first biomedical manufacturing plant built in Oregon and represented a company investment of \$400 million and a workforce of approximately 250.

**The Columbia-Willamette Workforce Collaborative:** Is a unique partnership that delivers a unified approach to serve industry and support economic development. The Collaborative offers a number of opportunities for the colleges and the region's Workforce Investment Boards to work together to coordinate employer engagement, develop industry intelligence and align efforts around common industry-driven goals. Since forming the Collaborative in 2008, we have received more than \$30 million in competitive grant resources to skill and train regional workers.

**NCRC+/Talent Link:** Worksystems was charged by then Governor Kitzhaber to establish the region as "certified work ready" and thereby better position us to meet employers' workforce needs. To accomplish this goal, Worksystems convened an array of partners, including the colleges, to develop and launch Talent Link. Using the National Career Readiness Certificate and other tools, Talent Link creates a framework shared by WorkSource partners and employers that strengthens our ability to prepare job seekers and to meet employers' workforce needs.

**Aligned Partners Network (APN).** The Aligned Partner Network connects the public workforce system and local agencies to provide a coordinated progression of services that help disadvantaged and underserved populations move into career-track employment. This model integrates the strengths and services offered by the various

partners within WorkSource, including community colleges, the Oregon Employment Department, and over 20 community based organizations into a collaborative and systemic approach.

**WorkSource-College Cohort Training:** In order to meet the needs of targeted populations within the public workforce system, Worksystems is partnering with community colleges to develop cohort-based trainings for specific customer populations, and collaborating in the recruitment, wrap-around services, and placement of these customers. This model capitalizes on the strengths of college programs that integrate Adult Basic Skills with occupational skills training.

**Manufacturing Industry - Regional Career and Technical Education (CTE) Advisory Board:** The Advisory Board evolved out of the 2013-2015 Manufacturing Workforce Plan developed in partnership with local industry through the Columbia Willamette Workforce Collaborative. The purpose of the Advisory Board is to work collaboratively among industry, secondary, and post-secondary education to inform and strengthen regional CTE programs.

**East Side Code Academy:** Worksystems provided support to help start the East Side Code Academy which is operated by MHCC.

3.8 Describe efforts to coordinate supportive services provided through workforce investment activities in the local area, including facilitating transportation for customers. [WIOA Sec. 108(b)(11)]

As job seekers progress through basic services into more intensive services through WSPM, barriers to engagement often present themselves as a problem for successful completion. To address these, we provide support service opportunities to help remove these barriers. Support Services are resources and financial assistance for job seekers who are enrolled in WorkSource. This assistance helps offset expenses necessary for a participant to engage in WorkSource activities or to retain employment. Support services may include state issued I.D.'s, bus tickets, child care, clothing, tools, auto repair, auto insurance, relocation, rent assistance, utilities, medical, dental, optical, parking, personal care, professional membership and licenses, test preparation and fees.

Community resources are the primary source for support service needs. Referrals are made to programs such as SNAP, housing resources, Dress for Success and other community based social services. When other resources are not available, WorkSource staff assess individual need and availability of funds to determine if support services can be provided.

Participants needing Support Services must complete these prerequisite activities:

1. Registration with WorkSource
2. WIOA enrollment and documentation
3. Prosperity Planner budget

The support service must be necessary to enable the participant to engage in education, training, job search activities or employment.

Identification Documentation – When a participant does not have identification documentation to complete the registration process, support services are used if no other resources are available.

All Support Services are tracked in the participants I-Trac record. In addition to the required payment documentation, a case note must be attached to the payment that describes:

1. Justification: how or why the support is necessary to enable the customer to engage in WorkSource services.
2. Lack of other resources: Case note how other resources were determined (i.e. Trade Act, Pell Grant, TANF, etc.)
3. Timeframe: Indicate the timeframe covered for the Support Services (i.e. one month, school quarter, etc.)

When Support Services are paid directly to the participant, a signature that acknowledges receipt of the support payment must be on file with the back-up payment documentation.

3.9 Based on the analysis described in Section 1.1-1.3, identify the populations that the local area plans to focus its efforts and resources on, also known as targeted populations.

There is no one-size-fits-all approach to building and sustaining the skilled workforce necessary to support a thriving community. For years, we have worked to build the capacity of WSPM to successfully serve the most vulnerable in our region. We believe the public workforce system must be responsive to the needs of all job seekers, but especially low-income and other underserved residents including those receiving public assistance, those with low basic skills and communities of color.

Worksystems is committed to ensuring that underserved populations have access to resources and training that will allow them to succeed in the labor force. We have championed and supported proven, innovative service strategies (APN, Career Pathways, TalentLink, Connect to Work for Ex-Offenders, Career Mapping, WorkSource Liaisons, etc.) and have pursued and obtained funding to achieve this goal (see section 3.13). Under this plan, we remain focused on building the partnerships and strategies to most effectively serve the following target populations:

- Low-income persons
- Basic skills deficient
- Ex-Offenders
- People with disabilities
- English language learners
- Homeless persons
- Public housing residents
- People of Color
- Veterans
- Public assistance recipients (SNAP, TANF)
- Youth disconnected from school or work

The public workforce system provided services to the following in PY 2014-15:

**Of 68,388 new enrollments in WSPM, July 2014-June 2015**

Low-income persons	60,683
Basic skills deficient	33,488
Ex-Offenders	5,749
Homeless persons	3,074
Disabled	3,829
Public housing residents	333
People of Color	21,200
Veterans	4,598
Public assistance recipients (SNAP)	20,117
Public assistance recipients (TANF)	3,000

**Of 431 new youth enrollments, July 2014-June 2015**

Youth disconnected from school or work	332

3.10 Based on the analysis described Section 1, identify one to three industries where a sector partnership(s) is currently being convened in the local area or there will be an attempt to convene a sector partnership and the timeframe.

Worksystems has long used a sector approach to guide our training investments. Over the past few years, we have broadened our strategy to align with our workforce development partners in Clackamas County and SW Washington State to better serve the needs of our combined labor shed. In full appreciation of the unique local jurisdictions that comprise the Portland-Vancouver Metropolitan Area, we believe there are significant advantages to working together and we are committed to assuring alignment, coordination and accountability in our efforts and we will provide a collective response when it is in the best interest of the workers and businesses of the region. After all, we know that people are willing to travel throughout the region for the best opportunities and that businesses need the most qualified workers regardless of where they live.

To this end, the Workforce Development Boards representing the Portland – Vancouver Metropolitan Area have developed a unified approach to serve industry, support economic development and guide public workforce training investments. Our partnership, the Columbia-Willamette Workforce Collaborative (the Collaborative), aligns our capabilities and resources to improve the region’s ability to leverage and layer funding streams, to coordinate ideas and strategies, to pursue resources and fill gaps, to link workforce supply and industry demand, and enable life-long learning and advancement. We work directly with business partners to understand labor market trends and to identify current and emergent workforce needs and craft comprehensive workforce solutions to meet the customized needs of industry.

In partnership with the Collaborative, Worksystems will support 4 target sectors during this Plan period: Health Care, Advanced Manufacturing, IT/Software and Construction. We have (or are in the process of developing) customized workforce plans for each of the 4 target sectors that guides our overall investment strategy in support of the regionally significant industries:

- The Manufacturing Workforce Plan is in a state of revision as the 2013-2015 plan just expired. An industry panel meets quarterly and is in the process of convening subcommittees around each of the 4 goals in the current plan to update the next set of deliverables. The 2016-2018 plan is scheduled to be ready by late spring 2016.
- The 2015-2017 Health Care Plan is underway and in the midst of implementation. The plan is focused on the Long-Term Care sector and an industry panel meets quarterly to oversee the deliverables.
- Formal industry panels for IT/Software and Construction will be formed by early summer of 2016, with regional Workforce Plans developed by the end of summer, 2016.

3.11 Based on the analysis described Section 1, describe the local investment strategy toward targeted sectors strategies identified in 3.10 and targeted populations identified in 3.9.

We work constantly with industry panels to identify emergent needs and address them through training investment. Each sector workforce plan defines specific goals, including targets for recruitment of new talent, training for new workers, matching workers to employers, and retention. The associated activities to make progress in each of these areas vary by sector. For example, in the health care sector we are co-funding a marketing campaign to help attract the right kind of talent to the Long Term Care sector to increase retention. In manufacturing, we have brought Certified Production Technician training to the region to help increase the pipeline of qualified new workers and deliver industry-recognized certifications.

Worksystems has been highly successful at bringing in competitive grant dollars from the Departments of Labor, Health & Human Services and Agriculture that have and will continue to bolster occupational skill training budgets and achieve thousands of certificates and credentials leading to living-wage employment in our target industries of health care, tech and manufacturing. To ensure that we're targeting these dollars to underserved communities, these grants serve specific populations such as long-term unemployed workers, barriered youth, homeless & housing unstable individuals, immigrants and English language learners, ex-offenders, and those receiving public benefits such as TANF, SNAP and Medicaid. We will continue to work with culturally specific service providers to recruit participants for these training opportunities so they can be prepared for target sector career ladder employment.

Our construction workforce strategies are especially focused on serving underrepresented populations. Worksystems, in partnership with Construction Apprenticeship and Workforce Solutions (CAWS), has administered workforce training funds from two Community Benefits Agreements (CBAs) in the City of Portland since 2013. CBAs are agreements between public entities and the contractors, unions and community representatives working on large public works projects: a percentage of each project's total funds are dedicated to creating equity in contracting and developing pathways to help historically underrepresented minorities and women access pre-apprenticeship training and enter construction trades. As part of the CBA work, Worksystems and CAWS have convened the Labor Management Community Oversight Committee (LMCOC) since 2012: a collaborative committee of community, union and industry partners that provides oversight and monitoring of CBA efforts to help maintain worker diversity and continued employment. Worksystems also convenes the Metropolitan Alliance for Workforce Equity (MAWE) a public/private consortium dedicated to construction workforce equity and the success of CBAs.

3.12 Identify and describe the strategies and services that are and/or will be used to:

- A. Facilitate engagement of employers, including small employers and employers in in-demand industry sectors and occupations, in workforce development programs in addition to targeted sector strategies
- B. Support a local workforce development system described in 3.2 that meets the needs of businesses
- C. Better coordinate workforce development programs with economic development partners and programs
- D. Strengthen linkages between the one-stop delivery system and unemployment insurance programs

This may include the implementation of incumbent worker training programs, on-the-job training programs, work-based learning programs, apprenticeship models, customized training programs, or utilization of effective business intermediaries and other business services and strategies that support the local board's strategy in 3.1.

[WIOA Sec. 108(b)(4)(A&B)]

- A. Staff from Worksystems and our partners in the Columbia-Willamette Workforce Collaborative partners are assigned to each of the 4 target sectors. These leads, in addition to being responsible for convening industry panels and overseeing workforce plan implementation, are charged with outreaching to the business community to identify employer-specific workforce issues and offer a wide range of potential solutions (rooted in public workforce system engagement). These solutions could include customized training cohorts of new workers, incumbent worker training (where funds are available), access to on-the-job training funds through Back to Work Oregon and competitive grant programs, custom recruitment events, or simply connectivity to WorkSource, among other services.

Worksystems, in partnership with the Columbia-Willamette Workforce Collaborative, use a five-phase approach to industry engagement for each target sector. Staff gather local industry intelligence and key data, convene business partners to analyze industry-identified workforce needs and opportunities, engage industry representatives, and convene other partners to develop comprehensive strategies to address those needs. After strategies have been developed, industry panels continue in an advisory role as plans are implemented. Outcomes are monitored and evaluated throughout the process. The following details highlight each phase of the approach.

### **PHASE I: INVESTIGATE**

During Phase I, the Collaborative investigates potential target industries. A Phase I investigation may be prompted by a variety of factors, including industry/employer encouragement, routine workforce data analysis that identifies promising trends, or support of economic development efforts to grow a particular industry. Based on the answers to key criteria and considerations (below), staff may recommend to the Collaborative that an industry be pursued using the five-phase framework. Approval by the Collaborative will set Phase II in motion.

#### **Required Criteria:**

- The industry is located in and/or has significant economic relevance to two or more WDB regions within the geographic boundary of the Collaborative.

#### **Considerations:**

1. Is the industry projected to grow or decline over the next decade? What is the total regional employment?
2. What is the local average wage, and are there positions in the industry all along the skill continuum?
3. Are there local training programs that train new or advancing workers for occupations in this industry?
4. Does the industry align with current and/or future funding priorities & grants?

5. What is the industry's economic and labor multiplier?
6. Are there initial relationships with industry to build off of?
7. Do key local economic development agencies work with the industry?
8. Does the industry have an active local association or consortium?
9. Do some of the major employers in the industry have headquarters in the Metro Area?
10. Are there political considerations that should be taken into account?

## **PHASE II: INVENTORY & ANALYZE**

During Phase II, staff conduct a comprehensive three-step review of workforce data, trends, and industry needs to pinpoint potential high-impact opportunities for staff engagement in the target industry and to prioritize training resources. Data and intelligence are analyzed in consultation with industry to identify priority areas for action.

### **Step One: Baseline Review**

- Demand-Side Data Review: Collect data on growth trends, UI claimants, and vacancies by occupation.
- Supply-Side Data Review: Inventory WorkSource customers with industry-related skills, and conduct a regional training program review, including the number of credential completions at each training institution.
- Industry Investment Review: Inventory WDB investments in the industry, including the number of WorkSource-funded credential completions and on-the-job trainings.

### **Step Two: Trend Analysis and Employer Survey**

- Initial Trend Analysis: Conduct a review of existing industry workforce reports and literature; interview associations and industry groups.
- Employer Survey: Obtain primary data about local employers' workforce issues.

### **Step Three: Analysis**

- Report: Develop a regional workforce report highlighting trends and key issues for the metro area.

## **PHASE III: CONVENE**

### **Step One: Industry Workforce Forum**

Armed with updated workforce intelligence products, the Collaborative holds regional targeted industry forums to kick off the formal employer engagement process. These meetings take a variety of forms – from webinars to large in-person gatherings. All forums must be relevant, with a clear agenda and tangible solutions offered for the business representatives in attendance. Forum outcomes include verification of key workforce issues and identification of industry champions for strategy development.

### **Step Two: Industry Panel Convening and Plan Build-Out**

Industry-driven and chaired by employers, an industry panel brings together local leaders in business, labor, education, workforce development, and economic development. Initially, industry panels are tasked with informing the build-out of the initiative action plan. Panel members will advise and approve strategies, outcome goals, and time horizons for all considered initiatives.

## **PHASE IV: ACT**

In Phase IV, plans developed by employer-led panels in Phase III are put into effect. Industry panel members receive regular updates on progress towards deliverables.

## **PHASE V: EVALUATE**

### **Step One: Evaluate**

Prior to beginning a summative evaluation, the initiatives generated by the industry panels should be complete and relevant quantitative and qualitative data must be available. Included in the evaluation:

- Success of industry-defined initiatives, based on defined goals
- Effectiveness of WDB project management process and staff
- Depth/impact of involvement by industry panel members
- Placement/advancement of workers in the industry

Potential methodologies:

- Convening industry panel, WDB staff and initiative stakeholders
- Quantitative data gathering
- Media coverage/testimonial analysis
- Third-party evaluation

### **Step Two: Report Out**

After data has been analyzed, internal and external reports are generated. These reports include key findings, recommendations, and next steps. Reports are released to industry, media, policymakers/delegation, and other stakeholders.

- A. In the Portland Metro Area, Worksystems has been supporting an Oregon Employment Department pilot to centralize and regionalize the business outreach and engagement arm of WorkSource. Worksystems has coordinated conversations to ensure that the regional approach stays connected to our five local centers, and that the business relationships developed by Regional Business Services (RBS) benefit WorkSource customers, target job seekers and grant enrollees. We provide coaching and technical assistance to the RBS staff to ensure they can speak to the diverse array of resources available in the system for employers. The industry panels coordinated by Worksystems offer an opportunity for employers to voice workforce concerns and be involved in planning around how to invest dollars to address those needs.
- B. Worksystems already works very closely with local economic development agencies, including the Portland Development Commission (PDC), Greater Portland Inc. (GPI), and the Westside Economic Alliance to name a few. We regularly attend GPI monthly business development meeting that includes representatives from Portland Metro economic development agencies, and we are consistently called upon to help support the recruitment of new companies to the region by providing workforce information. PDC co-funds \$2.7M in workforce development programming annually with Worksystems to address the goals of their Neighborhood Prosperity Initiative. These services are aimed at serving underserved adult and youth populations. Worksystems also convenes a bi-state Research and Analysis Committee that has membership from education, workforce, economic and community development partners, to align data gathering and analysis efforts and share information across organizations in support of common goals.
- C. All WIOA 1-B providers are co-located with Oregon Employment Department staff and serve a common customer population. As a result, Business and Employment Services, Claimant Reemployment programs, and Rapid Response are co-located and closely aligned. Additionally, Trade Act staff have been relocated to local Centers as part of a State pilot.

3.13 Does the local board currently leverage or have oversight of funding outside of WIOA Title I funding and state general funds to support the local workforce development system? Briefly describe the funding and how it will impact the local system. If the local board does not currently have oversight of additional funding, does it have future plans to pursue them?

Worksystems oversees millions of dollars in competitive grants and other resources outside of WIOA Title I that are directly leveraged into the public workforce system. These resources each have specific underserved populations targeted for services, and most have a specific industry focus. We administer all of the funds using WorkSource as the backbone for workforce service delivery, which means that the resources directly support customers walking in the front door of the public workforce system. Training dollars are integrated into each WorkSource Portland Metro center to be leveraged and aligned with WIOA formula dollars.

The following are current initiatives supported with resources outside of WIOA Title I funding and state general funds. These initiatives will continue through the plan period and we will continue to seek opportunities to diversify the funding available to the WSPM and CCN systems.

**City of Hillsboro Enterprise Zone:** The City of Hillsboro shares Worksystems' goal of aligning workforce training resources to maximize impact. Hillsboro has invested money, to be deployed through the public workforce system, to recruit and train new and diverse workers for manufacturing positions with Hillsboro companies. This investment includes several cohorts of Certified Production Technician training and On-the-Job Training funds.

**Portland Development Commission Enterprise Zone:** Portland Development Commission partners with Worksystems to implement incumbent worker and new worker training using city enterprise zone funds.

**Dislocated Worker NEG:** Funds from the State's multi-year National Emergency Grant are implemented through WorkSource. Funds have been used to train dislocated workers through WorkSource-administered ITAs and OJTs. These funds have also been key to developing an online training portal – Train Oregon – due to launch in the metro area in spring of 2016.

**Sector Partnership NEG:** Another multi-year grant, the Sector Partnership NEG is being used to support job training for WorkSource job seekers pursuing employment in the regionally targeted industries of Tech, Health Care, Manufacturing and Construction. A portion of funds is being used to support incumbent worker training for WorkSource-engaged employers.

**Job-Driven NEG:** The Job-Driven NEG targets training (particularly work-based training) to dislocated workers, with a focus on the long-term unemployed. This grant has also been delivered through the Construction of WorkSource.

**Metro Skills Training and Employment Partnership:** A four-year H-1B Skills Training grant from the USDOL ETA, Metro STEP has trained hundreds of local WorkSource customers to enter manufacturing and tech careers, primarily through grant-funded OJT.

**Metro In-Sourcing Training Initiative:** Also a USDOL ETA H-1B Skills Training grant, MISTI has both a new worker and incumbent worker focus. Worksystems has helped to train thousands of local incumbent workers to

advance in their manufacturing careers. MISTI has also trained hundreds of new workers for manufacturing and tech careers through WorkSource.

**Reboot Northwest:** A four-year grant through the Administration’s Ready-to-Work initiative, Reboot Northwest offers WorkSource-based coaching, preparatory and training services to long-term unemployed workers and veterans seeking to enter tech and manufacturing careers.

**Career Connect Network:** Career development services for youth, funded by Portland Development Commission and TK Foundation.

**SummerWorks:** Public and private sector sponsorship that supports summer youth employment programming including funding for wages and program Construction costs.

**Economic Opportunity Program:** Training and employment services for low-income Portland residents. Focus on immigrants, ex-offenders, homeless and public housing residents. Jointly funded by Worksystems, Portland Development Commission, Multnomah County Department of Community Justice, and the City of Portland.

**Healthcare Pathways Opportunity Grant:** Training and employment services in health care occupations for SNAP, TANF and Medicaid recipients.

**BankWork\$:** Industry-developed bank teller training to support the entry of low-income WorkSource customers into the banking industry. Funded by hiring bank partners and grants from the JP Morgan Chase and Miller Family foundations.

**LEAP:** Program to fund the Washington County Jail WorkSource Express Center that serves inmates pre-release who need individualized employment and training services and provide post-release support. The goal of the program is to work with inmates to attach them to the labor force and reduce recidivism.

**PREP:** Program with the Washington County Jail serving inmate pre- and post-release. PREP is funded partly by the Washington County Jail and is used as leverage for the LEAP grant.

#### **Section 4: Program Design and Evaluation**

Please answer the following questions of Section 4 in 12 pages or less. Many of the responses below, such as career pathways and individual training accounts, should be based on strategic discussions with the local board and partners. The local board is not required to complete the questions shaded in gray at this time.

4.1 Describe how the local board, working with the entities carrying out core programs, will expand access to employment, training, education, and supportive services for eligible individuals, particularly eligible individuals with barriers to employment. [WIOA Sec. 108(b)(3)]
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WIOA requires core programs to provide access to its programs through the one-stop (WorkSource Portland Metro) system. We fully support this requirement and believe all programs will be strengthened by working more intentionally together. In accordance with WIOA, we will spearhead the development of a Memorandum of Understanding (MOU) with core programs that describes the delivery of services through the WSPM system, including how costs will be shared among the partners.

Building stronger ties to Vocational Rehabilitation and Adult Basic Education services is essential to improving the WSPM system. Last year, more than 3,800 people enrolled in WSPM self-disclosed having a disability, yet there is no systemic connection to the services offered by the Vocational Rehabilitation system. Similarly, almost half of WSPM customers are basic skills deficient, but there is no articulated, systemic connection to WIOA Title II Adult Basic Education services.

In addition to building better connections with core programs, we intend to continue to expand our successful Aligned Partner Network (APN). The APN was designed to increase access to employment, training, education, and supportive services for eligible individuals, particularly those with barriers to employment. The program connects the public workforce system and local agencies to provide a coordinated progression of services that help individuals move into career track jobs. The APN is comprised of more than 20 different agencies and community based organizations that ensure people with barriers have access to the services and support they need to be successful.

The model includes the following elements:

- **Intensive Career Coaching** is provided by partner agencies and supported either through discretionary grants from Worksystems or leveraged staffing from partner agencies. Using a low staff person to participant ratio (approximately 1:35) allows staff to provide the intensive support and guidance the individuals with barriers need. They also are able to provide supportive services to ensure consistent participation in program activities. Career coaches guide participants through their career plans, which use WorkSource services to achieve their goals.
- **Career Mapping** is a best practice developed by Worksystems and partners over a decade ago. The person-centered planning process helps individuals identify their skills and articulate their short- and long-term training and employment goals, the resources needed to achieve their goals, and the next steps and timeline. The Career Plan created through this process is updated regularly throughout the course of their time in the program.
- **WorkSource Liaisons:** These individuals hold the model together. Charged with providing training and technical assistance to career coaches, they teach them to use the Career Mapping process and inform them about WSPM products and processes, including any new resources. Liaisons meet regularly with Career Coaches to review participant career plans and offer advice on next steps and provide technical assistance.
- **Specialized WorkSource Services:** We set aside 30% of the region's formula training fund to support individuals within the APN. In addition to the full-array of services available to the public at large, we also create specialized services designed to meet the needs of this population. One example is our Connect to Work Experience program, which placed individuals in paid work experiences to help them develop the workplace skills and industry-specific experience necessary to be competitive in the job market. We also offer specialized job development services to ensure they get placed in career track positions that meet their career goals.

Whenever possible, we pursue additional funding to support the needs of high-barriered populations. For instance, our Economic Opportunities Program (EOP), jointly funded with the City of Portland, operates under the APN model and serves low-income Portland residents. Through a network of seven different agencies, we provide intensive employment services to over 700 adults at any given time. Recently, we received funding from Home Forward to provide rent assistance to EOP participants who were experiencing homelessness or at risk of becoming homeless.

We also have received several large discretionary grants operating under this model including Housing Works (a four-year program that ends in April 2016) and Health Careers NW, a five-year program funded by US Department of Health and Human Services that connects public benefit recipients to training and careers in healthcare.

Moreover, we develop WorkSource services that directly serve the needs of barriered individuals including services for ELL clients (Rosetta stone, a Job Readiness Workshop, and Job Club), and individualized placement for people with criminal histories or those who have English as a Second Language.

We currently have a grant pending approval to integrate the SNAP 50/50 program with WorkSource Portland Metro. Last year, 29% of our enrolled customers were SNAP food stamp recipients – just over 20,000 people. This matching grant program will provide additional resources to enhance and expand training and employment services to WSPM customers who are receiving SNAP.

4.2 Describe how the local board will facilitate the development of career pathways, consistent with the Career Pathways Definitions. [WIOA Sec. 108(b)(3)]

We have been a long-standing proponent and supporter of career pathways as a means to help people, and especially those with barriers, secure marketable credentials, post-secondary education and achieve family supporting employment. We look forward to helping strengthen our current career pathways efforts and looking for new ways to evolve and expand the model.

Worksystems is a participant in a state wide workgroup that is tasked to develop career pathways programs called Moving Pathways forward. We are looking forward to continued participation in this workgroup and look to state leadership to provide more direction in this plan.

4.3 Describe how the local board will utilize co-enrollment, as appropriate, in core programs to maximize efficiencies and use of resources. [WIOA Sec. 108(b)(3)]

Co-enrollment between Wagner-Peyser and WIOA Title 1-B programs was implemented in 2008 under the purview of state policy framework and is widely successful and supported. Additionally, Worksystems co-enrolls with the Aligned Partner Network, a network of over 20 community-based organizations working integrally with the WSPM system. Creating a common customer through co-enrollment allows our workforce system to maximize its expertise and our resources in delivering services to our customers. The agencies involved in this collaboration of a common customer provide opportunity for our workforce system to have a collective impact in our community creating common goals for solving specific social and economic problems. Our integration with Wagner-Peyser, WIOA and community based organizations through our Aligned Partner Network has been our approach to creating a collaborative, common structure. We look forward to formalizing integration with Title II partners, Vocational Rehabilitation Services and the Department of Human Services to build further capacity and efficiency for our shared customers.

In addition to the multitude of agency benefits of co-enrollment, the most important beneficiary of this approach is our common customers. Co-enrollment and alignment of resources, increases the customer's access to support that is available in the community. It engages them in activities that elevate their current situations to a higher self-sufficiency based on their individual needs and employment goals. Our shared customers have a team of experts advocating for them and guiding them through service delivery and supports.

4.4 Not required to be completed at this time.

[Click here to enter text.](#)

4.5 Describe one-stop delivery system in the local area, consistent with the One-Stop Center Definitions including:

- A. The local board's efforts to ensure the continuous improvement of eligible providers of services, including contracted services providers and providers on the eligible training provider list, through the system and ensure that such providers meet the employment needs of local employers, and workers and jobseekers. [WIOA Sec. 108(b)(6)(A)]

WorkSource provides a combination of training and employment services that prepare individuals in improving their prospects in the labor market and include activities such as career counseling, occupational skill training, classroom training, or on-the-job training. Occupational skills training is one of the most effective tools we use to prepare job seekers for higher wage employment opportunities. WorkSource Portland Metro uses a Regional Eligible Training Provider List of training providers that help guide our job seekers in making informed decisions about training providers in high demand occupations.

The Regional Eligible Training Provider List (RETPL) is populated based on the Targeted Occupations List that meets high growth opportunities in the Portland-Metro area. The criteria and process for establishing and improving the RETPL are:

**Training in Target Occupations:** Worksystems will use the Oregon State ETPL as a starting point to populate the RETPL. Programs in Multnomah, Washington and Clackamas counties from the State ETPL that train individuals in targeted occupations will automatically migrate from the State ETPL to the RETPL. We are eager to see more training performance information and will share that with WSPM customers when it is available from the State.

**Training in Non-Target Occupations:** For training in non-target occupations, Worksystems will oversee an application process whereby individual training programs can petition to be on the RETPL. To ensure the quality of training providers on the RETPL we ask providers to complete a survey and answer follow-up questions from Worksystems staff. A staff committee will review the surveys on a rolling basis to determine whether the proposed trainings merit inclusion. Trainings approved by the committee will be added to the RETPL.

Considerations include:

1. Completion rate
2. Job placement services offered
3. Job placement data (including placement wage)

4. Connection to employers
5. Targeted populations/demographics (if applicable)
6. Total cost
7. Past history of success with WorkSource clients

Analysis of this information is used to continuously improve the quality of the RETPL.

B. How the local board will facilitate access to services provided through the one-stop delivery system in remote areas, through the use of technology, and through other means. [WIOA Sec. 108(b)(6)(B)]

In summer of 2015, Worksystems developed a contract with Open Sesame – a local company that aggregates online learning content – to produce an online career and training portal specifically to serve WorkSource customers. The product – Train Oregon – launches in spring of 2016. This portal will be exclusively available to WorkSource customers at no cost to them, and will provide access to a variety of career development and training content, including (but not limited to):

- Career exploration videos
- Soft skill courses designed to help customers identify/articulate strengths and increase professionalism
- Leadership development courses
- Self-paced GED prep courses
- Core Skills Mastery – a program that helps individuals build their basic skills and sense of self-efficacy
- Project management certification courses
- Industry specific content, including: Tooling U (NIMS-certified manufacturing program), Coding Strategies (for those interested in pursuing coding and billing careers in health care), and a variety of software coding and hardware/networking training courses in tech.

Train Oregon will offer an “online one-stop” to people in remote areas and to those who work during business hours and can’t make it into a WorkSource Center. This service is modeled partially on the success of Code Oregon (a program of Worksystems), which has helped 16,000 Oregonians gain access to the popular Treehouse training platform for learning software coding skills since 2014. In spring of 2016, Worksystems will launch Code Oregon 2.0, which will offer access to a broader array of online training content, largely through the new Train Oregon platform.

Lastly, I-Trac is a web based data management system developed by Worksystems for the purpose of collecting, reporting and managing customer-level program information for multiple funding sources. The system is based on workforce development program services that generally require system rules for eligibility determination, service level data that includes detailed information relative to training and education activities, as well as performance outcome reporting which includes details of employment. Program policies and grant rules define the system. The system has been in operation for 15 years and has been upgraded and modified multiple times to its current configuration.

The system currently manages over 100 separate funds with about 1,000 users and supports a total current participant count in the database of over 500,000 customer records. The users represented by these funds and participants are:

- All Workforce Development Boards in Oregon – tracking and reporting on all of the State’s WIOA and State funded grants, incumbent worker training grants and Federal discretionary grants, including Workforce Innovation and Job Accelerator Innovation Challenge grants.
- The State’s four TAACCCT grants to Clackamas, Rogue and Southwestern Oregon Community Colleges; one of which supported users and participants in each of the community colleges across the State.
- Customer tracking services for a variety of programs of the City of Portland, including Youth Summer work experience activities and employment and training programs funded with Community Development Block Grant funds.

C. How entities within the one-stop delivery system, including one-stop operators and the one-stop partners, will comply with WIOA section 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 regarding the physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities, including providing staff training and support for addressing the needs of individuals with disabilities. [WIOA Sec. 108(b)(6)(C)]

All WorkSource offices are ADA accessible and have technology available at the centers to assist participants who need accommodations. Each year center and program monitoring takes place to ensure that all offices are in compliance with ADA requirements. Through our integrated resources with partners, we are able to access additional supportive resources such as sign language interpreters, classroom technology, and other materials that may be needed to meet ADA accessibility requirements for job seekers to successfully complete activities.

WorkSource Portland Metro staff receive training on how to assist customers requiring accommodations.

D. Describe the roles and resource contributions of the one-stop partners by providing a summary of the area’s memorandum of understanding (and resource sharing agreements, if such documents are used). [WIOA Sec. 108(b)(6)(D)]

The Resource Sharing Agreement (RSA) that is currently in place is out of date. It is the State’s responsibility to update the RSA and we have not yet received any guidance relative to development of these Agreements.

E. Describe how one-stop centers are implementing and transitioning to an integrated technology-enabled intake and case management information system for core programs and programs carried out by one-stop partners [WIOA Sec. 108(b)(21)]

WorkSource uses the WOMIS database to gather intake information for registration into WorkSource. This information is populated into I-Trac and iMatchSkills for core programs. These two systems make up our case management information system and is used by all one-stop partners.

One opportunity that has not been fully explored is how these various and somewhat independent secure data management systems could better communicate with one another to ensure that customer activity can be shared. Data sharing would allow customers to register once rather than resubmit the same information over again, and program staff would be able to see the full customer engagement and recommend an appropriate and properly funded service engagement. With the current technology available it is unnecessary to build new and different systems. Instead, we should look for methods of sharing common customer data for the benefit of all service provision programs.

4.6 Consistent with the Guidance Letter on Minimum Training Expenditures, describe how the board plans to implement the occupational skill development expenditure minimum.

Clearly state whether the local board will:

A. Expend a minimum 25% of WIOA funding under the local board's direct control on occupational skill development.

OR

B. Use an alternative formula that includes other income beyond WIOA funding to meet the minimum 25% expenditure minimum. Provide a description of other income it would like to include in calculating the expenditure minimum.

Worksystems groups its investments into three categories:

Community Investments – Comprise the largest portion of our expenditures at 81% and represent resources delivered through a network of partners to provide direct training and employment services to targeted industry workers, adult job seekers, dislocated workers, and youth.

Coordination – Accounts for approximately 12% of expenditures and represents the bulk of activities carried out by Worksystems' staff. Coordination activities are essential to ensuring our community investments are achieving the intended goals and outcomes established by the Workforce Development Board and our various funding streams. In addition, coordination activities support the development of community and business relationships necessary to align resources, build partnerships and develop a more effective workforce development system.

Administration – Accounts for approximately 7% of our total expenditures and include things such as compliance, financial management, human resources, procurement and support of the region's Workforce Development Board.

Occupational skill development is funded through our community investments and we far exceed the State minimums and will do so for the foreseeable future. By investing and integrating our competitive grants through WSPM, we are able to dedicate very high percentages of those grants to occupational training. For example, our most recent grant, the Healthcare Pathways Opportunity Grant funded by the US Department of Health and Human Services, is anticipated to be funded at \$12M over the course of 5 years to support occupational training and placement into Health Care occupations.

In the event we approach this threshold requirement, Worksystems will take steps to ensure implementation of the occupational skill development expenditure minimum.

4.7 Describe the process and criteria for issuing individual training accounts. [WIOA Sec. 108(b)(19)]

WorkSource Portland Metro offers training scholarships to qualifying customers. Qualification is determined by the customer's training readiness, whether the occupation for which they are seeking training is on Regional Eligible Training Provider List (ETPL), and funding source requirements. The qualification process becomes competitive when the number of applications meeting the minimum qualifications is greater than the grant dollars available. In such circumstances, the *Priority of Service* considerations guide decision making. The following procedures establish a consistent method for the consideration and disposition Individual Training Accounts. Regional procedures address how WorkSource staff:

- Determine training readiness
- Assure a training grant is applied to occupational training programs listed on the Regional Eligible Training Provider List
- Apply Priority of Service.

Participants who seek occupational skills training must complete the following prerequisite services:

1. WorkSource Registration
2. WorkSource Advising
  - a. Occupational Training Application
  - b. Training Provider Research Worksheet
  - c. Informational Interview
  - d. Saved Prosperity Planner Enrollment Budget

If it is determined that the participant is best served with an ITA these additional requirements must be considered and met:

- The training program must be on the Regional Eligible Training Provider List
- Participant meets the qualifications and prerequisites established for the training by the training provider.
- If the training program is Pell Grant eligible, the customer must apply for the Pell Grant. If approved, the Pell Grant must be used in place of WIOA funds for training. WIOA funds may make up any gaps in training costs and available Pell funds.
- After completing training, the participant must complete and save the Prosperity Planner exit budget.

4.8 If training contracts are used, describe processes utilized by the local board to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided. [WIOA Sec. 108(b)(19)]

WorkSource Portland Metro customers are given several resources that help them select the most appropriate training provider that meets their targeted employment and training goals. When customers complete a Scholarship Training Application, they are required to do their own labor market research so that they are

informed of the projected growth in the industry or occupation that they have chosen. The participant completes the Prosperity Planner Budget to ensure that their wages upon completion will meet their self-sufficiency needs. The participant will self-select at least two training providers from the Regional Eligible Training Provider List and complete the Training Provider Research Worksheet which informs them of the training provider requirements and the costs associated with the training. Finally, the participant completes an informational interview with an employer who is hiring for occupations which require the credential he/she is seeking. The customer will then select the training provider that best meets their employment goals and is the most cost effective. This information is used during the ITA approval process and kept on file in the participants records.

4.9 Describe process utilized by the local board to ensure that training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate. [WIOA Sec. 134(c)(3)(G)(iii)]

Worksystems funds Occupational Training Scholarships, administered through WorkSource, to support the attainment of industry-recognized credentials. Through labor market data research, we have developed a *Targeted Occupations List* of high-growth, high-demand careers to help guide job seekers to quality employment opportunities. Occupations that meet a least three of these four criteria can qualify as target occupations for investment:

1. \$15/hour Median Wage
2. 2:1 training-to-openings ratio
3. Credentials available for the occupation can be obtained in 2 years or less
4. 50+ annual openings projected

There may be occupations that meet the criteria but are not included in the Targeted Occupations List based on relevant factors such as gathered industry intelligence. Target occupations will be reviewed and adjusted as necessary, based on changes in projected supply and demand and feedback from regional employers, Oregon Employment Department staff, and partner organization staff.

We also maintain a list of approved regional training programs (the Regional Eligible Training Provider List) that offer training in these in-demand occupations. To be included on the list, training providers must demonstrate strong job placement outcomes and we prioritize approval of programs that train job seekers to enter our target sectors of Construction, health care, IT/software, and manufacturing.

4.10 Describe how rapid response activities are coordinated and carried out in the local area. [WIOA Sec. 108(b)(8)]

Worksystems oversees the management of rapid response activities in the Portland-Metro area. The Rapid Response team is made up of WorkSource staff who, upon notification of a lay-off in the community, provide the following activities:

1. Immediate on-site contact with the employer of the affected workers
2. Provision of information and access to unemployment compensation benefits, access to WorkSource services, employment and training activities and Trade Adjustment Assistance (if applicable)
3. Provision of guidance and/or financial assistance in establishing a labor management committee through Labors Community Services Agency or a workforce transition committee
4. Provision of emergency assistance to the particular closing, layoff or disaster
5. Provide assistance and application in obtaining access to State economic resources through a National Emergency Grant

Affected employees are routed to WorkSource to participate in services based on their individual employment needs and goals.

## Section 5: Compliance

5.1 Describe the process for neutral brokerage of adult, dislocated worker, and youth services. Identify the competitive process and criteria (such as targeted services, leverage of funds, etc.) used to award funds to sub-recipients/contractors of WIOA Title I Adult, Dislocated Worker, and Youth services, state the names of contracted organizations, and the duration of each contract. [WIOA Sec. 108(b)(16)]

Worksystems designs and coordinates workforce development programs and services delivered through a network of local partners to help people get the skills, training and education they need to go to work or to advance in their careers. We do not deliver direct services.

Worksystems manages the competitive selection of WIOA Adult, Dislocated Worker and Youth services in line with organization policy and procedures and Federal law and regulations.

Current WIOA service provision contractors were selected through a negotiated procurement that included a panel review of proposals with their recommendation moved to the Portland Metro Workforce Development Board for final approval. The review panels included Worksystems staff, Board members and community and funder stakeholders. The proposals were evaluated against criteria outlined in the solicitation.

Revised Federal rules allow for subrecipient agreements to be entered into based on a set of established criteria. We will continue to review and evaluate the requirements of the services that are to be provided through the one-stop system, the current provision of services, employer needs and the needs of the participants coming into the system and will determine when it is appropriate to develop an updated competitive process to select appropriate service provision subrecipients.

### WorkSource System

Adult and Dislocated Worker services, provided through the five WorkSource Centers in the Portland Metro area, were competitively procured in February 2013 for the service period beginning July 1, 2013. The subrecipient agreements are awarded each year dependent on available funds and contractor performance. Elements considered for contractor selection included:

- Organizational Capacity and Demonstrated Success
  - Expertise and Experience

- Prior Performance and Data Management
- Leadership
- Staff Management
- Program Design and Delivery
  - Coordination and Integration
  - Skill Development
  - Quality and Continuous Improvement
  - Leverage
- WorkSource Liaison
  - An optional element for which potential contractors could submit a proposal; services were defined in the solicitation and included providing training and technical assistance to partner Vocational Case Manager staff at aligned partner agencies serving targeted populations and provide co-enrolled participants on-going connectivity to WorkSource services.
- Administrative Capacity

Selected contractors:

- WorkSource Portland Metro – East
  - Mt. Hood Community College
- WorkSource Portland Metro – Southeast
  - SE Works, Inc.
- WorkSource Portland Metro – Central
  - Portland Community College
- WorkSource Portland Metro – Beaverton-Hillsboro
  - Portland Community College
- WorkSource Portland Metro – Tualatin
  - Portland Community College

**Youth System**

Youth service coordination contracts were competitively procured in February 2012 for the service period beginning July 1, 2012. The subrecipient agreements are awarded each year dependent on available funds and contractor performance. Elements considered for contractor selection included:

- Organizational Capacity and Demonstrated Success
- Target Population and Geographic Area
- Program Design and Components
  - Development of Individual Career Plans
  - Leveraged Services
  - Career Exploration, Work and College Readiness Training, and Work Experience
  - Post-secondary Preparation, Navigation and Support; Job Search Assistance and Placement; Retention and Advancement Support
- Management and Staffing
- Budget Proposal
- Administrative Capacity

At the same time, proposals were requested for a single contractor to provide Work Experience Intermediary services. This contractor provides centralized work experience coordination for both youth in year-round program services as well as coordinating the summer work experience program SummerWorks. Elements considered for contractor selection included:

- Organizational Capacity/Demonstrated Success
- Program Design/Components
- Management and Staffing
- Budget Proposal
- Administrative Capacity

Selected Service Coordination contractors:

- Hillsboro School District
- Immigrant and Refugee Community Organization (IRCO)
- Mt. Hood Community College
- New Avenues for Youth
- Native American Youth & Family Center
- Oregon Human Development Corporation
- Open Meadow Alternative Schools (terminated June 30, 2015 – no renewal)
- Portland OIC
- Portland YouthBuild

Selected Work Experience Coordination contractor:

- Immigrant and Refugee Community Organization (IRCO)

5.2 Provide an organization chart as Attachment A that depicts a clear separation of duties between the board and service provision.

See Attachment A.

5.3 Provide the completed Local Board Membership Roster form included in Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment B.

See Attachment B.

5.4 Provide the policy and process for nomination and appointment of board members demonstrating compliance with Oregon draft policy WIOA 107(b) – Local Board Membership Criteria as Attachment C.

See Attachment C.

5.5 Provide the completed Local Workforce Development Board Certification Request form included in Oregon draft policy WIOA 107(c) – Appointment and Certification of Local Workforce Development Board as Attachment D.

See Attachment D.

5.6 Provide the name, organization, and contact information of the designated equal opportunity officer for WIOA within the local area.

Janice Frater  
 Director, Information Systems and Compliance  
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5.7 Identify the entity responsible for the disbursement of grant funds. [WIOA Sec. 108(b)(15)]

Worksystems, Inc.

5.8 Indicate the negotiated local levels of performance for the federal measures. [WIOA Sec. 108(b)(17)]

**Adult**

Average Earnings - \$15,200  
Employment Retention Rate – 84.0%  
Entered Employment Rate – 56.5%

**Dislocated Worker**

Average Earnings - \$15,300  
Employment Retention Rate – 84.0%  
Entered Employment Rate – 56.5%

**Youth**

Attainment of a Degree or Certificate – 72.0%  
Literacy and Numeracy Gains – 43.0%  
Placement in Employment or Education – 78.0%

5.9 Describe indicators used by the local board to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers and the one-stop delivery system, in the local area. [WIOA Sec. 108(b)(17)]

**Staff Oversight**

Board staff evaluate contractor performance and effectiveness ongoing throughout the program year. Tools for this evaluation include:

- Review of real-time performance reports available through the data management system
- Monthly review of expenses to budget
- Quarterly narrative reports submitted by contractor staff
- Annual on-site monitoring of program, fiscal and compliance elements

**Board Review**

Fiscal and program activities and performance are reviewed regularly at the Executive Committee meeting. The Local Workforce Development Board has standing committees engaged in strategic oversight activities in Youth, Adult and Business service areas. Additionally, Board members receive quarterly reports which provide detailed information on a variety of program areas; these reports are also available on Worksystems’ website.

## Center Review

Worksystems uses its Center Review process to assure quality service delivery and continuous improvement of the local integrated system that includes Wagner-Peyser, WIOA Title I-B Adult and Dislocated Workers, State SEDAF, and other partners. The review seeks to answer the question: How well are we serving our customers? Worksystems conducts a process for reviewing and certifying WorkSource Portland Metro Centers using a multi-pronged review process. Past reviews have included:

- On-site visits
- Review tool checklists based on integrated service design
- Customer satisfaction surveys of WorkSource Center customers
- Review and analysis of Center outputs and performance data

Information collected from the Center Review is presented to the WDB and findings are presented to each Center to continuously improve programs and services.

## Public Access

Detailed, quarterly program performance reports are available at the Worksystems website and are distributed to stakeholders and interested groups, organizations and individuals.

5.10 Provide a description of the replicated cooperative agreements, as defined by WIOA 107(d)(11), in place between the local board and the Department of Human Services' Office of Vocational Rehabilitation Services with respect to efforts that will enhance the provision of services to individuals with disabilities and to other individuals, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination. [WIOA Sec. 108(b)(14)]

State staff overseeing WIOA implementation have indicated they are working at the State level to negotiate an agreement with Department of Human Services for the state that will be shared with Local Areas for implementation. The Portland Metro local workforce area will follow all State guidance once issued; as of this plan publication date no additional information has been provided.

5.11 Describe the process for getting input into the development of the local plan in compliance with WIOA section 108(d) and providing public comment opportunity prior to submission. Be sure to address how members of the public, including representatives of business, labor organizations, and education were given an opportunity to provide comments on the local plans. If any comments received that represent disagreement with the plan were received, please include those comments here. [WIOA Sec. 108(b)(14)]

The local plan was posted and available for public comment from February 26 through March 27, 2016 on Worksystems' website. A notification was sent to a broad group of community stakeholders including business, labor organizations, and education. The Executive Committee of the Portland Metro Workforce Development Board approved the Plan on March 30, 2016 and it will be submitted to the State on April 1, 2016. All public comment will be compiled and submitted to the State.

Numerous community partners and stakeholders also participated in the development of Worksystems' strategic plan. Participants are listed in Attachment E.

5.12 State any concerns the board has with ensuring the compliance components listed below are in place prior to July 1, 2016. Copies of documents are not required at this time but may be requested during monitoring.

- Administration of funds
- Agreement between all counties and other local governments, if applicable, establishing the consortium of local elected officials
- Agreement between the Local Elected Officials and the Workforce Development Board
- Local Workforce Development Board Bylaws
- Code of Conduct
- Approved Budget
- Memorandum of Understanding and/or Resource Sharing Agreements, as applicable
- Required policies on the following topics
  - Financial Management including cost allocation plan, internal controls, cash management, receipts of goods, cost reimbursement, inventory and equipment, program income, travel reimbursement, audit requirements and resolution, annual report, property management, debt collection, procurement, allowable costs
  - Program Management including equal opportunity for customers, supportive services, needs related payments, file management, eligibility, self-sufficiency criteria, individual training accounts, layoff assistance, priority of services, grievance for eligible training providers list, transitional jobs, stipends, training verification/refunds,
  - Risk Management including records retention and public access, public records requests, monitoring, grievance, incident, disaster recovery plan
  - Board Policies including board appointment, board resolutions, conflict of interest
  - Human Resources including employee classification, benefits, holidays and PTO, recruitment and selection, employee development, discipline, layoffs, terminations, and severance, drug policy, sexual harassment, equal opportunity/non-discrimination
- Professional Services Contract for Staffing/Payroll Services, if applicable
- Contract for I-Trac Data Management System

The Portland Metro local area is confident of compliance with the elements noted above, with the exception of the Resource Sharing Agreement, as the State has not yet provided any guidance relative to development of these Agreements.

5.13 Not required to be completed at this time.