**- REVISED October 2020\* -**

**Workforce Innovation and Opportunity Act**

**Local Plan**

**[INSERT LOCAL AREA NAME]**

Submitted by

[INSERT LOCAL BOARD NAME]

July 1, 2020 – June 30, 2024

[\*Revised content appears in red font]

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# Section 1: Workforce and Economic Analysis

# Please answer the questions in Section 1 in five (5) pages or less. The Oregon Employment Department’s Workforce and Economic Research Division has a regional economist and workforce analyst stationed in each of the nine local areas. These experts can assist in developing responses to the questions 1.1 through 1.3 below.

# Please briefly address any available economic analysis that focuses on expectations for the COVID and post-COVID economy.

# Please limit the inclusion of tables and charts to those that are critical to your analysis.

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| 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)] |

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| 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)] |

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| 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)] |

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| 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)] |

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| 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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# Section 2: Strategic Vision and Goals

# Please answer the questions in Section 2 in six (6) pages or less. Section 2 responses should be greatly influenced by the members of the local workforce development board and other community stakeholders.

# Include how your vision, goals, and strategic planning process may respond to significant changes in your local area due to major events (e.g., the COVID pandemic, etc.).

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| 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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| 2.2Describe how the board’s vision and goals align with and/or supports the vision of the Oregon Workforce and Talent Development Board (WTDB):The WTDB approved their [2020-2021 Strategic Plan](https://www.oregon.gov/WorkforceBoard/board/Documents/191021%20-%20WTDB%20Strategic%20Plan%20-%20FINAL%20One-Page%20Plan.pdf) in September 2019.**Vision**Equitable Prosperity for All Oregonians**Mission**Advance Oregon through meaningful work, training, and education by empowering people and employers |

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| 2.3 Describe how the board’s goals, strategies, programs, and projects align with and will contribute to achieving the WTDB’s Imperatives, Objectives, and Initiatives summarized below:* Advancing equity and inclusion and connecting all of Oregon’s communities (tribal, rural, urban, and others);
* Working collaboratively and expanding workforce system partnerships, especially public-private partnerships;
* Acting on bold and innovative strategies that are focused on results;
* Aligning workforce system programs and services and investments;
* Increasing awareness, access, and utilization of workforce system programs and services;
* Understanding the true wages required for self-sufficiency and advocating solutions that address gaps;
* Increasing problem-solving and critical thinking skills in students, youth, and adults;
* Creating and recognizing industry-driven credentials of value including essential employability skills; and
* Increasing progress toward achieving Oregon’s Adult Attainment Goal.
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| 2.4 Describe board actions to become and/or remain a high-performing board. These include, but are not limited to four categories with accompanying indicators, based on national best practices and characteristics of high performing local boards. See Local Plan References and Resources. [WIOA Sec. 108(b)(18)]* Data-driven Decision-making
	+ The Board is positioned as the “go to” source for labor market information among community partners.
	+ The Board utilizes the labor market intelligence provided by regional economists for decision making.
* Strategy
	+ The Board monitors and updates a strategic plan.
	+ The Board frames board meetings around strategic initiatives and utilizes a consent agenda.
* Partnerships and Investments
	+ The Board collaborates regularly with core partners and organizations beyond the core partners.
	+ The Board is business-driven and uses a sector-based approach to engaging local employers.
* Programs
	+ The Board promotes efforts to enhance provision of services to individuals with barriers to employment.
	+ The Board has established policies, processes, criteria for issuing individual training accounts that aligns with its identified goals, strategies, and targeted industries.
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| 2.5 Describe how the board’s goals relate to the achievement of federal performance accountability measures. [WIOA Sec. 108(b)(1)(E)] |

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

Please answer the questions in Section 3 in **four (4) pages or less**. Many of the responses below, such as targeted sector strategies, should be based on strategic discussions with the local board and partners.

**Include how your partnerships and investment strategies may change/respond to significant changes in your local area due to major events (e.g., the COVID pandemic, etc.).**

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| 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(1)(F)] |

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| 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(2)] |

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

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| 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(12)] |

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| 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(13)] |

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| 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)] |

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| 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)] |

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| 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)] |

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| 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.  |

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| 3.10 Based on the analysis described Section 1, identify all 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. Identify whether or not the Next Gen model is being used for each sector partnership. If the Next Gen model is not being used, describe why it is not being used. |

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| 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.  |

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| 3.12 Identify and describe the strategies and services that are and/or will be used to: 1. 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
2. Support a local workforce development system described in 3.2 that meets the needs of businesses
3. Better coordinate workforce development programs with economic development partners and programs
4. 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)] |

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| 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?  |

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**Section 4: Program Design and Evaluation**

Please answer the following questions in Section 4 in **five (5) 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.

**Include how your program design may change in response to recent major events (e.g., the COVID pandemic, etc.) in your local area.**

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

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| 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)] |

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| * 1. Describe one-stop delivery system in the local area, consistent with the One-Stop Center Definitions including:
1. 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)]
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| 1. 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)]
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| 1. 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(6)(C)]
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| 1. 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)]
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| 1. 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)]
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| * 1. 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:1. Expend a minimum 25% of WIOA funding under the local board’s direct control on occupational skill development.

OR1. 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.
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| 4.6 Describe the policy, process, and criteria for issuing individual training accounts (ITAs) including any limitations on ITA amounts. [WIOA Sec. 108(b)(19)] |

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| 4.7 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(19)] |

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| 4.8 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)] |

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| 4.9 Describe how rapid response activities are coordinated and carried out in the local area. See Local Plan References and Resources. [WIOA Sec. 108(b)(8)] |

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| 4.10 Describe the design framework for youth programs utilized by the local board, and how the required 14 program elements are to be made available within that framework. |

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**Section 5: Compliance**

Please answer the questions in Section 5 in **ten (10) pages or less**. Most of the response should be staff-driven responses as each are focused on the organization’s compliance with federal or state requirements.

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| 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)] |

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| 5.2 Identify the One-Stop Operator and describe the established procedures for ongoing certification of one-stop centers. |

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| 5.3 Provide an organization chart as Attachment A that depicts a clear separation of duties between the board and service provision.  |

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| 5.4 Provide the completed Local Board Membership Roster form included in Oregon policy WIOA 107(b) – Local Board Membership Criteria as Attachment B. See Local Plan References and Resources.  |

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| 5.5 Provide the policy and process for nomination and appointment of board members demonstrating compliance with Oregon policy WIOA 107(b) – Local Board Membership Criteria as Attachment C. |

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| 5.6 Provide the completed Local Workforce Development Board Certification Request form included in Oregon policy WIOA 107(c) – Appointment and Certification of Local Workforce Development Board as Attachment D. See Local Plan References and Resources.  |

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| 5.7 Provide the name, organization, and contact information of the designated equal opportunity officer for WIOA within the local area. |

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| 5.8 Identify the entity responsible for the disbursal of grant funds. See Local Plan References and Resources. [WIOA Sec. 108(b)(15)] |

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| 5.9 Indicate the negotiated local levels of performance for the federal measures. [WIOA Sec. 108(b)(17)] |

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| 5.10 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)] |

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| 5.11 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)] |

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| 5.12 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. See Local Plan References and Resources. [WIOA Sec. 108(b)(14)] |

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| 5.13 State any concerns the board has with ensuring the compliance components listed below are in place. Copies of documents are not required at this time but may be requested during monitoring. Administration of fundsAgreement between all counties and other local governments, if applicable, establishing the consortium of local elected officialsAgreement between the Local Elected Officials and the Workforce Development BoardLocal Workforce Development Board BylawsCode of ConductApproved BudgetMemorandum of Understanding and/or Resource Sharing Agreements, as applicableRequired policies on the following topicsFinancial 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 costsProgram 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, determination of an insufficient number of eligible training providers in the local area (if applicable), transitional jobs, stipends, training verification/refunds, Risk Management including records retention and public access, public records requests, monitoring, grievance, incident, disaster recovery planBoard Policies including board appointment, board resolutions, conflict of interestHuman 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 |

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| 5.14 Provide the completed copies of the following local board approval forms:* Statement of Concurrence
* Partner Statement of Agreement
* Assurances

WIOA compliant versions of these documents are posted at: <https://oregonlocalplanning.weebly.com/>  |