

Local Implementation Plan  
Workforce Investment Council

11/30/2012

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Workforce Investment Council  
Strategic Plan  
Section 1

January 1, 2013 – June 30, 2015

**Sector Strategies.** For **each** sector you plan to address, please complete the following:

Please note: For the purposes of planning, the Workforce Investment Council of Clackamas County is considering the full three county metro area, recognizing it is one labor shed.

1. The Sector:

Health Care - As is the case around the nation and much of the state, the health care industry is growing in the Portland Metro area and Clackamas County specifically. With the fundamental changes in health care delivery statewide and nationally, along with an aging workforce, the demand for health care will continue to grow dramatically.

Projections for employment in the health care industry show an increase in the metro area of over 25,000 employees between 2010 and 2020, an increase of 32.6%. The distribution of health care employment reaches from the urban areas into the rural pockets of Clackamas County and includes practices of all sizes (attachment I-a).

Prior to this planning exercise, health care had been identified by the Columbia-Willamette Workforce Collaborative as a sector of focus. Following the model developed by the Collaborative (see section 7 for details on the model), Phase 1 and Phase 2 have been completed. A unique, comprehensive survey was developed during Phase 2 with input from local health care employers and industry associations. This survey was distributed to a variety of professionals in the health care field including several levels of management and administration. The survey was conducted in fall 2011 and as a result, a complete report was published in June 2012. This report includes identification of trends, workforce needs and a general industry update. (attachment I-b). With national health care reform a certainty, Oregon stands poised and ready to embrace the challenges of meeting the health care needs of all Oregonians. There is still much unknown about how workforce will be affected by Coordinated Care Organizations, Non-Traditional Health Care Workers, an aging workforce, and the shift to preventative care. The Workforce Investment Council with the Columbia-Willamette Workforce Collaborative will be at the table to refine how WIA funds are invested in the community.

Manufacturing – In the Metro area, the geographical diversity of manufacturing firms is vast. While there's density in the urban area, manufacturing firms are found throughout rural Clackamas County. (attachment I-c). The manufacturing sector is expected to grow in the metro area by over 21%, or nearly 5,500 positions by 2020.

As is true with health care, the Columbia-Willamette Workforce Collaborative has identified manufacturing as a key industry to study and aggressively address workforce demands. Although the model outlined by the Columbia Willamette Workforce Collaborative is used as the guide, the manufacturing work actually started with Phase 3. In June 2012, in coordination with Senator Jeff Merkely and Manufacturing 21, a forum was held with key manufacturers from around the metro region. The conversation began there and was followed by a wide-ranging survey that was distributed to manufacturing employers throughout the Metro area (consistent with Phase 2 of the model). The results of this survey will inform next steps. A manufacturers listening panel is scheduled for December 2012 to discuss the results of this survey with key employers throughout the metro area. Ultimately, prioritization of investments in occupational training for participants will be put in place.

2. Sector’s Economic Size and Scope:

Health Care - Throughout the Metro area there are 3,612 health care employers ranging in size (attachment I-a) that employ a total of 78,517 people. This represents 11% of the Tri-County’s private sector employment and 12% of payroll. A few specific activities support the growth in this sector including a new Kaiser Permanente hospital being built in Washington County and Peace Health expansion in Clark County. With a projected 19.9% industry growth over 5 years, expansion will be felt across the geographic region.

Clackamas County Business and Economic Development completed a report on health care that indicates a ten year job forecast of 31% in Clackamas County alone. Over 710 companies in this sector provide employment to over 13,000 workers in Region 15. This also includes several of the county’s largest employers, which support hundreds of small and medium size suppliers. (attachment I-d)

Manufacturing - 727 manufacturing companies employ over 27,500 individuals throughout the Tri-County area and include a wide range in the size of employers. (attachment I-c). Industrial Manufacturing represents 4% of the area’s private sector employment and 5% of payroll. The primary suppliers of labor include training providers, WorkSource and staffing service agencies (Aerotek, Manpower, Express). In Clackamas County specifically, there is a high concentration of staffing services. Throughout the Metro area there are five community colleges who all offer occupational training in manufacturing and a variety of apprenticeship programs.

In Region 15 specifically, Metals Manufacturing is recognized as a key economic driver. Clackamas County Business and Economic Development Department has completed a comprehensive report on the sector that indicates a projected job growth of 23% over the next 10 years. Over 220 companies provide employment to over 5,600 workers in Clackamas County. This sector includes several of the county’s largest employers, which support hundreds of small and medium size suppliers. (attachment I-e)

3. Job Demand for the sector:

Health Care – Health care is evolving. With the changes come new and revised non-traditional health workers which are expected to include in-demand positions like Peer Health Navigators, Peer Wellness Specialists, Community Health Workers, and ongoing replacement positions for occupations including nursing (with an emphasis on specialty nurses). It is projected that the health care industry will have 25,042 positions open due to growth and an additional 16,885 positions open due to replacements between 2010 and 2020. Current demographics include the following:

	Males	Females
Ages:		
14-18:	222	400
19-21	559	1,573
22-24	886	3,196
25-34	4,230	15,319
35-44	4,613	13,798
45-54	4,113	14,010

Section 1: Local Strategic Plan

55-64	3,588	11,699
65-99	908	2,020
TOTAL	19,121	62,025

With the majority of workers in the age ranges between 25 and 54, the pending workforce shortage is not a problem yet. This may explain the fewer positions identified for replacing current workers and the overwhelming majority of openings in new positions. However, the future retirement boom will create much opportunity in this field.

Manufacturing - While manufacturing continues to become more automated and sophisticated, multi-skilled welders are expected to be an ongoing need for manufacturers in addition to machinists. New positions between 2010 and 2020 are projected to total 5,428 with virtually the same amount, 5,943, due to replacing current workers.

Ages:	Males	Females
14-18:	73	15
19-21	432	92
22-24	809	156
25-34	4,026	884
35-44	5,345	1,248
45-54	6,415	1,542
55-64	4,245	1,024
65-99	636	214
TOTAL	21,986	5,185

Clearly the majority of current manufacturing workers are over the age of 35. This will not have an immediate demand for replacing current workers, but there will be a steady departure of workers out of manufacturing over the next 20 years.

Looking at these two industries, the wide range of historically female and male-dominated industry-specific positions is shifting from traditional roles. The swap of more men entering the health care field and more women entering manufacturing is changing the culture and face of these industries, offering more opportunity for all. While these trends won't turn the demographic data on its head over the next 8 years, it is important to note.

4. Supply and Demand Alignment for the sector:

Health Care Concentration: The Tri-county's Health Care sector has a location quotient of 0.9%, indicating that this industry is slightly less concentrated here relative to the industry structure of the US. The health care sector is forecasted to add 25,000 jobs by 2020, an increase of 32.6%. Currently there are over 10,000 workers who have indicated they have health care experience who are either registered in the state system, are receiving unemployment insurance or who recently completed a health care training program. (attachment I-f). The information gained from the work of The Collaborative will inform thoughtful investments throughout the tri-county area.

The Oregon Career Pathways program provides job seekers with a more competitive edge in securing employment. There are five regional community colleges with a variety of short-term certificates available in the health care industry. Locally, through Clackamas Community College, the career cluster of Health Sciences is related to the promotion of health and treatment of diseases. These include Clinical Lab, Gerontology, and Medical Assisting. Although the number of Medical Assistants is saturated, the demand will come back around with changing legislation and demographic shifts.

Manufacturing Concentration: The Tri-County's Industrial Manufacturing sector has a location quotient of 1.1 (relative to the US), indicating that this industry has about the same proportion of employment in this sector as the nation. The manufacturing sector is forecasted to add 5,400 new jobs between 2010 and 2020 – a growth rate of 21.1%. This is in addition to almost 6,000 replacement jobs. The number of job seekers either currently enrolled in the state system, receiving Unemployment Insurance, or who recently completed a training program in Industrial Manufacturing total over 15,000 potential workers. (attachment I-g) Although this number appears high, there is a mismatch between what employers are looking for in employees and the skills of the employee workforce. The definition of 'manufacturing' is broad and many individuals may identify themselves as having manufacturing experience or be interested in a manufacturing job but not actually have the skills to be employable in the sector.

The training providers in the area have been responsive to the increasing demands and anticipate being able meet these demands by offering occupational training that leads to stackable certifications that will articulate to further certifications or degrees. Clackamas Community College offers several short-term certificate programs that translate into manufacturing positions. From welding to construction apprenticeship programs to electronics technologies, there are options that lead to entry-level positions in the manufacturing industry.

With the expected demand in these sectors, individuals with barriers to employment may find opportunities to secure employment with increased wages. In Clackamas County and regionally, there is an emphasis to serve barriered populations who are including but not limited to jobseekers:

- with background issues,
- who have a disability,
- who receive financial assistance,
- who speak English as a second language,
- are over age 55, and
- Veterans.

Recent grants have been awarded to the region targeting public housing recipients and ex-offenders.

##### 5. Population to be served:

Health Care: There are some job seekers who are not eligible for employment in the health care field, specifically many individuals who have a criminal background. Considering that limitation, the following populations will be targeted in this sector approach:

- *Youth* – Region 15 has a long history of supporting youth in career exploration through 'road trips': opportunities for youth throughout the region to visit and tour a variety of companies. The barriers for youth are vast, not the least of which is the

unemployment rate (34.7% in 2010). This lack of work for today's youth will affect them not just today, but into their future as well. Working with youth in Region 15 through the contract with C-TEC youth services provides them with soft skills training, support and assistance in achieving basic training and exposure which will help prepare them for jobs, perhaps in the health care field.

- *Public housing participants* – the Housing Works program recently funded by the Department of Labor throughout the Portland metro area will support work with this population. Housing residents have historically battled long term unemployment and underemployment and face other challenges with maintaining a job like dependable transportation and child care. Through the Housing Works program, training and support services will be offered to housing resident participants. This will support their employment success.
- *Long term unemployed and people with disabilities including mental illness* – Region 15 contracts with Community Solutions of Clackamas County to offer intensive services to this population at the WorkSource Clackamas Annex. Barriers to employment for the long term unemployed can include a shortage of skills currently needed in the work place. The WorkSource system is addressing some of this with the Reemployment Eligibility and Assessment (REA) and the Extended Unemployment Claimant (REA-EUC) programs, which attempts to re-engage the long term unemployed with services and products provided through WorkSource Clackamas and partners. WorkSource Oregon is an equal opportunity program. Services are available free of cost, upon request include auxiliary aids or services, alternate formats, such as Braille, large print, audio CD or tape, oral presentation, and electronic format to individuals with disabilities.
- *Participants who speak English as a second language* – the Workforce Investment Council contracts with the Immigrant and Refugee Community Organization (IRCO) to intensively serve this specific population. Barriers include limited training and credentialing in the participants' native language, curriculum that is exclusively offered in English and includes culturally specific information, the inability to translate skills from the country of origin to the U.S. culture, and a general lack of sufficient resources to support necessary long term training for people speaking native languages other than English. The WorkSource system also provides language assistance to individuals with limited English proficiency and ESL instruction. VESOL enhances employability and self-reliance by providing communication skills to become more competitive, flexible, and adaptable in the job market. The program addresses needs assessment (of students, vocational facility, and labor market), intake, adapted vocational instruction, VESOL instruction, support services, job development and placement, program evaluation, and coordination of components. It can provide general VESOL for students with vocational skills who only need language skills to get a job, retain a job, or advance in a job or VESOL can provide Bilingual Vocational Instruction, counseling and support services, job development, and vocational placement. VESOL has been used with a variety of ESOL populations and increases access to vocational programs and support services, improves the quality of ESOL programs and services, and reduces dropout rates. Programs can be customized based on a specific industry, ranging from manufacturing to healthcare. For example, an employee working in food service or providing janitorial services for a health care facility, could begin working to become a CNA by learning both CNA skills and English.
- *Older workers* – These workers may need skill advancement while at the same time may run into stigmas with employers that could be exacerbated by earning history

and expectation. A perceived skill mismatch with older workers can also impact work opportunities. Conversely, as in the case of displaced homemakers, a lack of in-demand skills may be a reality in order to perform jobs that are currently needed. In addition, as workers age they may run into degenerative physical barriers that limit their ability to work in some jobs. Region 15 staff and contractors take this all into account as older workers are served both through WorkSource Clackamas and the Annex.

- *Veterans* – Veterans have historically had access to a variety of enhanced services in Region 15. The Hire Oregon Veterans (HOV) program has provided intensive level services to veterans in addition to the services offered through WorkSource Clackamas. Although the HOV program is no longer funded, the institutional knowledge and practices learned carry on in the region in part due to one FTE now being funded by Clackamas County to serve this population. Clackamas Community College continues its work in identifying skills that veterans possess as a result of their time in the service and awarding *credit for prior learning* for that work. Ultimately this effort will help veterans continue their education and utilize what they learned in the military while working in civilian jobs. Today's veterans may return home to find the job they left has changed dramatically or does not exist anymore. Other veterans may not have had a job before entering the military. All of these barriers are magnified when considering veterans who have disabilities that range from Post Traumatic Stress Disorder (PTSD) and traumatic brain injuries to loss of limbs. Clearly these individuals experience additional barriers to finding work.

Manufacturing: The target population for the manufacturing sector is, frankly, wide open. With the variety of jobs available there are very few limitations. Region 15's targeted population includes:

- *Ex-offenders* - the Workforce Investment Council recently received grant from the Department of Labor (Strong Bond: Solutions to Work) focusing on this population, so there is already a commitment to serve these job seekers. Barriers for this population include their conviction because employers can be hesitant to hire someone with a criminal background. The Solutions to Work grant, in addition to other services offered through the WorkSource Clackamas Annex, will provide intensive level services for this population in helping them reach gainful employment.
- *Youth* – Region 15 has a long history of supporting youth in exploring the manufacturing sector through 'road trips': opportunities for youth throughout the region to visit and tour manufacturing companies. The barriers for youth are vast. Manufacturing is facing a potential work shortage because youth today are not as interested in exploring careers in manufacturers as their parents were. Additionally, the impact of the high unemployment rate among youth (34.7% in 2010) affects them not just today but into the future as well. Working with youth in Region 15 through the contract with C-TEC youth services provides them with soft skills training and support and assistance in achieving basic training to prepare for jobs, perhaps in the manufacturing field.
- *Public housing participants* – the Housing Works program recently funded through the Department of Labor throughout the Portland metro area will support work with this population. Housing residents have historically battled long term unemployment, underemployment and other challenges with maintaining a job like dependable transportation and child care. Through the Housing Works program, training and

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- *Older workers* – These workers may need skill advancement while at the same time may run into stigmas with employers that could be exacerbated by earning history and expectation. A perceived skill mismatch with older workers can also impact work opportunities. Conversely, as in the case of displaced homemakers, a lack of in-demand skills may be a reality in order to perform jobs that are currently needed. In addition, as workers age they may run into degenerative physical barriers that limit their ability to work. Region 15 staff and contractors take this all into account as older workers are served both through WorkSource Clackamas and the Annex.
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their time in the service and awarding *credit for prior learning* for that work. Ultimately this effort will help veterans continue their education and utilize what they learned while in the military while working in civilian jobs. Today's veterans may return home to find the job they left has changed dramatically or does not exist anymore. Other veterans may not have had a job before entering the military. All of these barriers are magnified when considering veterans who have disabilities that range from Post Traumatic Stress Disorder (PTSD) and traumatic brain injuries to loss of limbs. Clearly these individuals experience additional barriers to finding work.

6. Potential for Impact of working with the sector:

Employer participation in Region 15 and the broader metro region is varied yet dedicated. The commitment begins at the Workforce Investment Board. There are nine manufacturing employers represented on the board and one health care provider represented (one more is in process for appointment) and three representatives of labor. In addition, partnerships with manufacturing and health care employers are found in On the Job Training agreements, the monthly employer spotlight, job matches in iMatchSkills, and work with the Business and Employment Services team.

In addition to these workforce partnerships, Workforce Investment Council staff also manage and direct the Clackamas County Business Alliance (CCBA). This relationship allows for direct access to a wide range of employers throughout Clackamas County. All major health care companies are members of the CCBA as are seven major manufacturers. The CCBA has identified workforce as one of its business priorities.

Other business-focused organizations in the region include the Oregon Employment Department's Employer Council and the Clackamas County Economic Development Commission. Each have representatives from health care and manufacturing and are active in the workforce dialogue. Manufacturing 21 is an active partner in the region as well.

Perhaps some of the most concrete opportunities for business partnerships can be documented through signed commitments for grant proposals, letters of support, participation in local planning, participation in industry listening panels and the Regional Collaboration Committee. Overwhelmingly employers are at the table and willing to offer wisdom and advice regarding workforce issues.

Career pathway programs throughout the Portland Metro region include:

- Clinical Lab (CCC)
- Gerontology (CCC and PCC)
- Medical Assisting (CCC)
- Machine Manufacturing Technology (PCC)
- Microelectronic Technology (PCC)
- Medical Customer Service (MHCC)
- Nursing Assistant (MHCC)
- Machine Tool (MHCC)
- Welding (MHCC)
- Machining (Clark College)
- Medical Office (Clark College)
- Nursing (Clark College)
- Mechatronics (Clark College)

7. Implementation plan:

Two years ago the Workforce Investment Council implemented the Strategic Occupations list. This list is compiled using market research to identify projected in-demand occupations. The service providers in Region 15 are directed to limit their investments to training identified on the Strategic Occupations List. This list continues to evolve each year and become more targeted. This intentional investment helps support the supply for in-demand positions in our targeted sectors.

At the kick-off meeting for the strategic planning process the Workforce Investment Council Board of Directors had an outstanding turnout. Employers, public sector partners, labor and others were all present. The board is invested in seeing that these sector strategies are implemented completely, efficiently and responsibly. Employers are prepared to drive this process.

In addition to the investment locally in Region 15, the broader regional work that's being done through the Columbia-Willamette Workforce Collaborative (CWWC) in the greater Portland metro area assures the work involving these sectors will be completed. The CWWC includes manufacturing and health care employers, economic development professionals and labor representatives who are all invested in completing the work that's already begun around manufacturing and health care sectors. Ultimately, the staff from all three workforce boards are committed to continuing this work to assure area employers have the skilled workforce they need to be successful.

WorkSource Clackamas partners are strong partners at the leadership table in Region 15 and will be more engaged in the broader regional work in the near future. This partnership helps with information sharing around specific industry engagement, sharing industry intelligence and communicating with industry as a whole.

The largest training partner in Region 15 is Clackamas Community College (CCC). CCC has a strong track record responding to specific industry training needs. For instance, when a solar power manufacturer was considering a move to Clackamas County, CCC staff visited the home factory in California to learn about their product and techniques in manufacturing the product and created a curriculum specifically for that firm. The customized training department at CCC enjoys a strong reputation for being responsive and creative in meeting industry training needs. The relationships between WorkSource Clackamas, the Workforce Investment Board and Clackamas Community College are strong, collaborative and effective.

The Columbia-Willamette Workforce Collaborative has also highlighted industrial manufacturing and health care as industries of focus regionally. The goals of The Collaborative provide a regional approach to meeting industry demands by bridging regional governments, business, labor, educational institutions, and economic development. Areas of interest to the sector could include:

- Training current workers to improve productivity and reduce skill gaps;
- Training new workers for in-demand occupations;
- Improving retention and enhance the sectors workforce;
- Finding funding for future projects.

The Collaborative has developed a model for sector engagement broken down into five phases:

*Phase 1: Investigate*

During Phase 1, 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), workforce board staff may recommend to the Collaborative that an industry be pursued using the five-phase framework. Approval by the Collaborative will set Phase 2 in motion.

*Phase 2: Inventory and Analyze*

During Phase 2, staff conducts a comprehensive three-step review of workforce data, trends, and industry needs to pinpoint potential high-impact opportunities for 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.

*Phase 3: 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 4: Act*

In Phase 4, plans developed by employer-led panels in Phase 3 are put into effect. Staff provides Collaborative leadership and industry panel members with project updates on a regular basis during implementation, while continuing to work with industry to follow trends.

*Phase 5: Evaluate – Assess our actions and results*

*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 WIB 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, WIB 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.

Having started with the Health Care industry, the Columbia Willamette Workforce Collaborative is entering Phase 3 of the model and will be convening industry groups in the next six months. Much is unknown about how the public workforce system will invest in Oregon's health care strategies as reform begins to take shape. The Manufacturing team is also entering Phase 3 and will be bringing the first industry panel together in early December, 2012. The CWWC works closely with Economic Development to provide qualified workers to the thriving industries in the Portland Metro region. According to the Clackamas County Economic Landscape report (attachment I-h) published by Clackamas County Business & Economic Development, there are ten growth industries, including health care and manufacturing. The Economic Landscape uses the following example to articulate the projected future of health care in the county (attachment I-d):

*The future outlook for the health care cluster is very positive. Average compensation is well above the county-wide average for all jobs, and continues to trend upwards. Total GDP (valued added) and direct employment increased by 9% between 2006 and 2010. As Clackamas County and regional population increases and the amount of people over the age of 65 expands, the health care cluster should continue to experience above average growth and investment.*

The Economic Landscape uses the following example to articulate the demand for manufacturing in the county (attachment I-e):

*Advanced manufacturing-metals and machinery has strategic market opportunities. The global demand for metals is increasing. Oregon's exports of metals and machinery approached \$1.6 billion in 2010, up 38% from the preceding year. As surface roadways become more crowded, expect urban areas to reinvest in fixed route transit systems including commuter rail, light rail and street car trains. This bodes well for firms such as Oregon Iron Works – maker of the only streetcars produced in the U.S. – along with other companies and their supply chains. Liquid metal alloy ion coatings will find new applications in the use of solar panels and other green technologies. Metals recycling is a focus of Clackamas County companies. As demand grows for metals, opportunities for value-added manufacturing using recycled content will increase.*

WorkSource Oregon is a key partner in the sector engagement strategies. Information from research and employer surveys will be shared with industry leaders within the Business and Employment Services team and other providers at WorkSource Clackamas. As new projects and investments refine focus, the WSO partners will be asked to distribute information, share opportunities with employers, and take part in the process.

**Certified Work Ready Communities.** This strategy will be implemented in three phases:

1. **Phase 1 – early adopters.** Due to limited resources three to four communities will be identified for this phase of implementation. Early adopters will assist with the piloting of a soft skills assessment. This phase will begin the first week of January 2013.
2. **Phase II –** will begin on July 1, 2013. It will include all of those who have self-identified to begin their implementation on this date.
3. **Phase III -** will begin on July 1, 2014. It will include all those who have self-identified to begin their implementation on this date.

In order to become a CWRC, communities must meet the following criteria:

1. % of NCRC holders in each of the categories defined by ACT. The table on page 7 provides targets by category for each county.
2. Employer letters of commitment by county. The table on page 7 provides targets for each county.
3. Soft Skills Assessment – certification requires a minimum of:
  - a. 25% of the Emerging workforce target number will receive a soft skills assessment
  - b. 25% of the Transitional workforce target number will receive a soft skills assessment
  - c. 25% of the Letters of Commitment (LOC) are from businesses who prefer NCRC holders receive a soft skills assessment

*Note:* A soft skills assessment will be identified for use in Phase I above. If proven successful, it will be fully implemented starting in Phase II. If not, a replacement tool will be identified and implemented in Phase II.

4. Local Strategy – identify how you will use Work Ready Communities to support one of the other two strategies you are developing in this plan – sector strategies, system innovation.

*Becoming a Work Ready Community (WRC) will help bolster economic development in the region. Sharing WorkSource tools such as the NCRC and the NCRC Plus with employers will help them meet increased hiring demands by quickly identifying qualified applicants. Being recognized as a WRC will also work as an economic driver. Clackamas County is anxious and ready to support expansion of any industry looking to relocate into the area, but especially for manufacturers. If Region 15 can demonstrate there is a work ready workforce standing by to meet the needs of employers, everyone wins.*

Many CWRC will be certified at the county level. Recognizing that labor sheds often cross county lines and that some counties have organized themselves as regions, Local Areas may choose to develop plans for the certification of individual counties or whole several counties grouped into regions within the workforce area.

Local Areas will develop plans of up to two years for identified county(ies) to become certified as CWRC. Each CWRC must be recertified after two years to ensure they have not fallen below required criteria levels. The recertification process will be a shorter process than the original certification.

Local Areas should assume that they will be expected to produce NCRC numbers similar to those produced the previous year and that funding levels will remain the same for this “base line” production. Local Areas should assume that additional funding will be provided for the implementation of CWRC approved for Phase I, based on this year’s approach to funding. Local Areas should assume additional resources for Phases II and III, but should not assume that the current formula for funding NCRC will be continued past June 30, 2013.

**For each Certified Work Ready Community (CWRC) you intend to become certified in your Local Area, please answer the following information:**

1. County/Countries to become CWRC: Clackamas County
2. Work Ready Community Lead:
  - Name: Bridget Dazey
  - Organization: Workforce Investment Council of Clackamas County
  - Title: Program Manager
  - Address: 365 Warner Milne Rd, Oregon City, OR 97304
  - Office Phone: 503.657.1727
  - Email: [bridget.dazey@wicco.org](mailto:bridget.dazey@wicco.org)
3. If you began planning/working on implementing work ready community(ies) prior to July 1, 2012, please describe your activities.

*In July 2010 Region 15 began offering the National Career Readiness Certificate (NCRC) to job seekers in the workforce system. Since that time, over 1,400 certificates have been issued in the region. Service delivery contractors have staff who have been trained as proctors to meet the growing demand for the NCRC tests. All members of the Business and Employment Services Team have been promoting the NCRC to employers resulting in 57 letters of commitment to prefer the NCRC. The employment Services team is comprised of WorkSource Clackamas staff from Clackamas Community College, the Oregon Employment Department and the Workforce Investment Council. This team will continue to play a lead role in this effort and a campaign will be fully implemented by July 1, 2013 (Phase 2). . As we engage the Health Care and Manufacturing industries, the NCRC and CWRC will be part of the discussion and a key tool to how the public workforce system can invest in the sectors. Many manufacturing employers in Clackamas County are small to medium sized. Becoming a Certified Work Ready Community will help attract additional businesses to the area. The NCRC could significantly affect hiring practices since smaller companies have limited funds to direct toward human resources.*

4. Please use the table below to describe the team that will work together to implement the strategy to become a work ready community and the roles and responsibilities of each team member.

5.
 

Team member	Organization	Role

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<p><i>Kim Freeman</i></p>	<p><i>Oregon Employment Department (WorkSource Clackamas)</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote the NCRC</i></li> <li>• <i>Engage and encourage job seekers at WorkSource Clackamas to take the NCRC</i></li> <li>• <i>Support and connect job seekers in accessing the support offered through the skills assessment</i></li> <li>• <i>Promote the NCRC to employers through the Business and Employment Services Team including asking for letters of commitment to prefer NCRC in hiring</i></li> <li>• <i>Potentially staff proctoring at WorkSource</i></li> </ul>
<p><i>Maureen Thompson</i></p>	<p><i>Community Solutions for Clackamas County (WorkSource Annex)</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote the NCRC</i></li> <li>• <i>Engage and encourage job seekers at WorkSource Clackamas Annex to take the NCRC</i></li> <li>• <i>Support and connect job seekers in accessing the support offered through the skills assessment</i></li> <li>• <i>Promote the NCRC to employers including asking for letters of commitment to prefer the NCRC in hiring</i></li> <li>• <i>Offer proctoring for NCRC test takers</i></li> </ul>
<p><i>Ray Hoyt</i></p>	<p><i>Clackamas Community College</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote the NCRC</i></li> <li>• <i>Engage and encourage job seekers at WorkSource Clackamas Annex to take the NCRC</i></li> <li>• <i>Support and connect job seekers in accessing the support offered through the skills assessment</i></li> <li>• <i>Promote the NCRC to employers including asking for letters of commitment to prefer the NCRC in hiring</i></li> <li>• <i>Offer proctoring for NCRC test takers</i></li> </ul>

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<p><i>Megan Helzerman</i></p>	<p><i>Clackamas County ESD C-TEC Program</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote the NCRC with the emerging workforce</i></li> <li>• <i>Offer proctoring for youth taking the NCRC</i></li> <li>• <i>Support and connect youth in accessing the support offered through the skills assessment</i></li> <li>• <i>Promote the NCRC to employers including asking for letters of commitment to prefer the NCRC in hiring</i></li> </ul>
<p><i>Cindy Hagen</i></p>	<p><i>Clackamas County Business and Economic Development Department</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote with employers as an economic development tool</i></li> <li>• <i>Requests Letters of Commitment from employers</i></li> </ul>
<p><i>Rob Campbell</i></p>	<p><i>Small Business Development Council</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote with employers as an economic development tool</i></li> <li>• <i>Request Letters of Commitment from employers</i></li> </ul>
<p><i>Jerry Buzzard</i></p>	<p><i>DHS</i></p>	<ul style="list-style-type: none"> <li>• <i>Promote and encourage job seekers to take the NCRC</i></li> <li>• <i>Potentially offer proctoring for participants interested in taking the NCRC</i></li> </ul>

6. How will you achieve the criteria for NCRC attainment by category as indicated in the table on page 7. Describe the delivery system for NCRC attainment in the county(ies) that will become certified, how far you are from your goal, and your plan to ramp up to meet the criteria. Please describe how you will leverage the foundation of WorkSource Oregon to implement your CWRC.

*Throughout the system, the NCRC is growing in recognition and support. Momentum for this tool continues to build. As discussions have continued around this planning process, partners are engaged and committed to aiding in attainment of the CWRC goal. Among job seekers awareness is building and is more familiar. Partners including Clackamas Community College, Community Solutions for Clackamas County and C-TEC have created a system to allow for expanded proctoring for transitional and emerging workers. Given the recent changes in the location of the Skills Review assessment, in Region 15 this is now embedded in the Career Gateways workshop to ensure more participants have the opportunity to take advantage of this offer. Facilitated lab time will be scheduled to assist participants with WIN tutorials. As a requirement for most training funded by WIA, participants will need to attain the NCRC*

*Among economic development organizations including the county's department and the Clackamas County Business Alliance, there has been enthusiasm and support for this effort. As this agenda is rolled out, discussion of the NCRC and CWRC will become a tool in the tool box of all entities who work with employers in the region. Training on the NCRC for staff who engage businesses will be offered by the Workforce Investment Council.*

7. How will you leverage assessment and remediation/training opportunities in your community?

*The working relationships among the workforce system participants in Clackamas County are very strong. Clackamas Community College offers adult basic education support and is open and creative in offering cohorts for WIA participants if there is demand. Recently received competitive grants provide additional support for participants in achieving basic skills that will assist with work readiness and an ability to learn additional skills necessary for job success. Continuing to promote the skills assessment in WorkSource Clackamas and the Annex will familiarize participants with the style of test, questions and expectations. Staff recognizes that success taking the skills assessment helps set up participants for success in taking the NCRC. Clackamas Community College also offers English as a Second Language assessment and services. This ensures the participant is placed in the correct class level. Assessment in basic computer skills is available through remedial workshops. Ultimately this work leads to more individuals who are able to take and pass the NCRC with improved skills.*

*Something that may need to be addressed is how individuals with disabilities access the NCRC and the limited accommodations available. An unintended consequence may be screening out individuals with disabilities for certain jobs where workplace accommodations would be available and appropriate.*

8. How will you engage businesses to achieve your business engagement goals on the table on page 7.

*The Workforce Investment Council and partners including Clackamas Community College, the Business and Economic Development Department of Clackamas County, the Clackamas County Business Alliance, the Employment Department Employer Council, the Business and Employment Services team and Chambers of Commerce from throughout the county are actively engaged and familiar with the public workforce system. Often representatives from these organizations are at the table while conversations regarding NCRC and CWRC occur. As the campaign for the Certified Work Ready Community (CWRC) is implemented, partners will be expected to share collateral on the National Career Readiness Certificate (NCRC) and CWRC when meeting with businesses. There is willingness and openness by partners to assist with these efforts and obtain letters of commitment by employers. Trainings on how to talk with employers about the NCRC and CWRC will take place in spring 2013 so that partner staff who interact with employers will have a common message about the benefits of NCRC and the goals of CWRC. Additional outreach is planned including presentations to a variety of organizations that will include testimonials by employers, written articles for inclusion in newsletters, and wide distribution of printed materials. A strong commitment by public partners to include information on the NCRC while talking with employers is critical, and present in Region 15. The success of this outreach will ultimately be measured through increased NCRC letters of commitment from employers.*

9. How will you meet the criteria for implementing a soft skills assessment (note: the state will identify a soft skills assessment and provide training and assessment costs):

- 25% of the Emerging workforce target number will receive a soft skills assessment
- 25% of the Transitional workforce target number will receive a soft skills assessment
- 25% of the Letters of Commitment (LOC) are from businesses who prefer NCRC holders receive a soft skills assessment

*The soft skills assessment will be included as an expectation of the NCRC. Jobseekers will be informed that it is an option, but it will clearly be communicated that it is in the jobseekers best interest to complete all four sections. Employers consistently ask for this type of assessment for jobseekers. The emerging workforce will be offered the test as part of the regular WIA program. The C-TEC Youth Services team will include the soft skills assessment as part of the regular program and the Summer Youth Academy. The recently awarded competitive grants to serve transitional workers with specific barriers to employment will include a component which will require the soft skills assessment be completed by participants.*

10. Please identify how the implementation of a CWRC in your local area will support or integrate with one or both of the other strategies in this plan.

*Becoming a Work Ready Community (WRC) will help bolster economic development in the region. Sharing WorkSource Clackamas (WSC) tools such as the NCRC and the NCRC Plus with employers will help them meet increased hiring demands by quickly identifying qualified applicants. Being recognized as a WRC will also work as an economic driver. Clackamas County is anxious and ready to support expansion of any industry looking to relocate into the area, but especially for manufacturers. If Region 15 can demonstrate there is a work ready workforce standing by to meet the needs of employers, everyone wins.*

*As WSC customers receive their NCRC, they will be connected, as appropriate, with employment and training pathways available in targeted sectors including Advanced Manufacturing and Health Care. Region 15 will continue to support occupations in demand and work to steer customers towards opportunities available across the Portland Metro region.*

**System Innovation.** While each of the strategies above requires system innovation, this strategy focuses on specific processes and services that Local Areas can identify to increase coordination and alignment. System innovation is defined as continuous improvement to increase alignment, integration, and effectiveness without significant additional resources.

Please answer the following questions to describe how local partners will work together to create more highly integrated services leading to system outcomes and increased joint accountability. Use the attached outcomes table to set targets and show how each partner will contribute to strategic plan outcome targets. Long term trend data has been provided on as many measures as possible to assist with this planning effort.

## 1. Greater program alignment and integration

- a. **The local “menu of options”.** The table below lists system elements that are performed by most of the programs in the workforce system. For example, most workforce programs do some level of assessment with job seeking customers and those interested in improving their skills. Most programs in the system perform some sort of job placement or job development function, etc.

Please select one to three system elements from the “menu of options” below that the partners in your region will work on collectively to increase alignment and integration in order to meet your outcome targets and support your targeted sectors and work ready community strategies. For example, a region that targets the health care sector may determine they could achieve better placements and retention by focusing on client assessment to make sure those who participate in training have the skills and aptitudes needed to succeed. The region would then work across programs to administer assessments, share relevant assessment information and use this new approach to better match program completers to employers. Another region, focusing on clean technologies such as renewable energy, might determine that improved technology utilization could improve their case management and skill development capabilities. Partners would work together to determine how to best implement these technologies.

Assessment	•Examples: Common assessment tools; career advisement
Career/Work Readiness and Preparation	•Examples: Career-Related Learning Experiences, “Essential Skills,” National Career Readiness Certificate (NCRC)
Skill Development	•Examples: Online remediation, short-term courses, on-the-job training
Career Pathways and Career Technical/Professional Education	•Examples: Career pathways, dual enrollment, apprenticeship, enhanced STEM skills.
Work-Based/Experiential Learning	•Examples: job shadowing/mentoring, internships, sheltered work.
Entrepreneurship	•Examples: Small Business Development Centers, entrepreneurial training, business leadership education, mentorship
Case Management	•Examples: Seamless service delivery, information sharing
Technology Utilization	•Examples: data-driven decision making, client to product direct interface, self-instructional tools and curricula
Job Placement	•Examples: coordinated job development and placement.

*The Workforce Investment Council of Clackamas County is focusing on the following three system elements to assure the workforce needs in the Manufacturing and Health Care sectors are being addressed.*

- *Strategy 1: Assessment - Identify current skill levels of job seekers and training participants through informal interviews, career advisement, occupation and skills explorers, and foundational skills review.*
- *Strategy 2: Career Readiness and Preparation- Connect participants to career readiness preparation and certificate programs such as apprenticeship programs, competitive grants and placement for specialized populations, NCRC, and Career Pathways programs.*
- *Strategy 3: Job Placement Via sector engagement, place participants with the skills and qualifications to meet the needs of employers in the identified sectors through job development, OJT, and certified work experiences.*

**b. System Inventory and opportunities for increased co-location.** Innovation in service delivery also includes greater co-location of programs and services for a more comprehensive approach to serving the needs of WorkSource Oregon (WSO) customers. This includes greater physical co-location as well as new/enhanced use of technology to expand access and increase the efficiency of service delivery.

1. Please review and confirm the list of (WSO) Centers and program delivery sites. A WSO Center must be certified by the Local Workforce Investment Board (LWIB) as meeting the criteria set forth in the Oregon Workforce Investment Board (OWIB) policy. Please describe how all components of the fully integrated WSO flow are being implemented in any certified WSO Center and the most recent date of certification for each center (see the integrated flow below). Please describe how Oregon Employment Department (OED) and Title 1B funded staff are delivering the full integrated flow together at each certified one-stop center. For those centers that are not fully integrated, please describe your plan and timeline to integrate these.

*The Welcome Team staff is trained to determine the needs of customers and referring them to where they will best be served. Skills Team members are co-located at WorkSource Clackamas. Welcome, Skills, Business & Employment Team members are afforded the opportunity to work together whenever it is needed to help business and individuals in a very collaborative and helpful way. The teams share information and work collaboratively with the ultimate goal being demonstration of integration as a seamless service delivery model. Complete integration allows the customer to believe a full team of people work for them.*

*Integrated staff at WSC have developed two specific integrated teams of Oregon Employment Department and Workforce Investment Act staff. The Clackamas Menu of Resources and Services team is led by the Workforce Investment Council Program Manager to develop and market workshops, use LEAN concepts to keep the customer flow manageable and to recommend and develop staff training and mutual agreements about issues such as: customer service, personal responsibility, professional development and team work. This team makes recommendations to the Leadership Team, who then assures implementation. This process makes it possible for WorkSource to make changes as needed and also allows for everyone on the integrated team to have a voice on how services are delivered. Another example is the Business*

*and Employment Services Team. This group is lead by the Employment Department Supervisor and the Workforce Investment Act funded Operations Manager. This team is focused on business services and works together to offer recruitments to employers, on-the-job training and internship opportunities, and develops recruitment strategies that are currently being adopted by other Worksource Centers in Oregon. Although cross training has occurred between different teams, there are challenges with integration among the different teams due to staff and funding constraints. There is significant support during high volume times across partners helping with the Welcome Team duties, but more on an as-needed basis.*

*The certified one-stop, WorkSource Clackamas, 506 High St, Oregon City was last certified on March 1, 2005. Since October of 2008, WorkSource Clackamas has been fully integrated including co-location. (attachment I-i)*

2. If your LWIB approves additional, auxiliary or satellite WSO sites, please identify these on the chart and provide your criteria for approving them.

*WorkSource services are provided at the WorkSource Clackamas Annex, just blocks from WorkSource Clackamas, the certified one stop. Community Solutions for Clackamas County is the primary provider of services to JOBS clients and also offers targeted, specialized services for multiple, highly-barriered job seekers. Like many JOBS providers throughout the state, space limitations require services to JOBS participants be offered at a site separate from WorkSource Clackamas. In an effort to expand and built upon the integrated model, multiple funding sources have come together to support the WorkSource Clackamas Annex. Investors include the Department of Human Services JOBS training program, Community Corrections, Veterans services, and competitive grants funded through the Workforce Investment Council. Referrals back and forth between the Annex and WorkSource Clackamas occur regularly and because of the proximity, participants are able to walk back and forth if necessary to access services at each site.*

*The impetus for the Annex was the anticipation of severe budget cuts in July 2011 and a need to reduce duplication of services among organizations offering job support, employment readiness, skills training and job referrals to individuals with significant challenges to employment. Region 15 was invested in exploring ways to find efficiencies and reduce duplication while maintaining the integrity and value of employment services for the individuals served by the partner organizations. A sense of urgency to create this site existed due to shrinking state and federal budgets and anticipated funding cuts for many of the represented organizations at the table, particularly the Department of Human Services JOBS program. Jobseekers with criminal backgrounds, drug and alcohol addictions, mental health issues, poverty and long term unemployment were benefitting from the one-on-one intensive employment coaching and job readiness activities the various organizations offered. However, with budget cuts many of these county residents would not have access to the very services that would help them to become gainfully employed.*

*What transpired was a commitment from the Workforce Investment Council and the other partners around the table to pool human and financial resources and integrate staff and job seeker services for their respective clients in a location that that had previously been the site for a TANF employment program and a WIA service provider. The result is*

*a site with eight funding streams, 18 staff, a prime location next to the public transportation transit mall, seven on-going job readiness workshops and over 600 job seeker visits a month.*

*Represented funding includes Workforce Investment Act, Wagner-Peyser, Temporary Assistance to Needy Families, Community Corrections, Senior Community Service Employment, County general funds, Department of Labor competitive grants, and several other federal grant funded programs. Staff from each represented agency work with all job seekers in the center resulting in more clients from each funding stream receiving quality services with reduced funding while at the same time eliminating service duplication.*

*Currently there is no interest by the One Stop Operator collaborative group to pursue certification of the WorkSource Clackamas Annex. The Annex is considered an extension of the WorkSource Clackamas site. Conversations with the provider (Community Solutions of Clackamas County), the Board of Directors and the full One Stop Operator group occur regularly and if there ever is an interest in certifying the Annex and staffing it like a stand alone, integrated WorkSource site, the Workforce Investment Council would work toward that goal.*

3. Please identify any opportunities in your community for potentially increasing co-location (leases expiring, staff needing new locations, etc.)

N/A

4. Please identify your region's recommendations for integrating additional partners into the WSO customer flow.

*As a result of receiving two competitive Department of Labor grants, the Housing Authority of Clackamas County and Clackamas County Community Corrections were added as partners of WorkSource Clackamas. Since July 2010, Immigrant and Refugee Community Organization and Express Personnel have been partners of the One-Stop. The One-Stop Operator is a consortium of the partners vested in making WorkSource Clackamas a universal access point. This team is committed to bringing organizations and agencies to the table who share in serving Clackamas County job seekers, employers, and workforce.*

5. Please identify your timeline for center certification based on the OWIB policy during the lifetime of this plan.

*The Workforce Investment Council Center Certification policy (attachment I-j) is aligned with the OWIB policy. In Region 15, however, certification has been delayed for a variety of reasons, not the least of which was an effort by the Oregon Workforce Partnership (OWP) to develop a common policy for center certification. Because this effort has stalled, Region 15 is in the process of updating the current policy (that dates back to 2002) and will complete center certification by June 2013. After that, certification will be completed every two years.*

6. Please describe how WSO centers and other program sites will support sector strategies and work ready communities.

*All partners can benefit from sector engagement by gaining a better understanding of employer and industry needs and challenges. By serving employers as a One-Stop, employers will gain a more centralized point-of-contact, which has been an on-going request. A WorkSource Clackamas (WSC) team of staff will help identify ways to promote CWRC amongst in employers in targeted sectors.*

*The partners that make up the One-Stop Operator believe in building on the resources and services available through WorkSource Clackamas. They have committed to assisting in spreading the word about the NCRC and NCRC Plus to their participants and the employers they work with.*

- 2. Governance: Compacts.** Once your local plan is approved, a compact will be formed that will identify all of the parties engaged in the delivery of your plan, their roles, responsibilities and outcome targets. The purpose of the compact is to achieve greater alignment of resources and activities within the service delivery system toward the Governor's vision. Your approved implementation plan will be the work plan for the delivery of the compact. All compact partners will be asked to sign the agreement.

Please describe how partners were engaged in the development of this plan.

*At the Workforce Investment Council board meeting in April, multiple partners were present in addition to many private sector board members. Each key agency was represented. Participants included eleven representatives from the private sector, Clackamas Community College, the Oregon Department of Human Resources, the Oregon Employment Department, two representatives from labor, local school district representation, and Clackamas County. The two hour board meeting was dedicated to giving the attendees an overview of the strategic plan process and receiving feedback. By the end of the meeting, there was consensus on the workforce strategies the region would focus on and an overarching framework for the strategic planning process and expected outcomes. Very positive feedback was received from attendees.*

*Once the Board of Directors provided direction, staff has been meeting regularly with partners and board members individually, in bi-weekly Leadership Team meetings, during Business Services and Executive committee meetings, and One-Stop Operator Partner meetings. Discussions about the plan took place between April – November multiple times:*

- Six Board of Director and Executive Committee meetings. Representatives included private industry, Clackamas Community College, Oregon Department of Human Services, Community Solutions for Clackamas County, Oregon Employment Department, Clackamas County Business and Economic Development, labor and local K-12 representatives.*
- Eight leadership team meetings. Leadership team meetings include representatives from Oregon Employment Department, Clackamas Community College, Community Solutions for Clackamas County, and the Workforce Investment Council.*
- Four Partner/One Stop Operator meetings. Members of this team who were present include Oregon Vocational Rehabilitation, Easter Seals, Community Solutions for Clackamas County, Oregon Department of Human Services, Clackamas Community College, Immigrant and Refugee Community Organization, Clackamas ESD, and Express Employment Professionals.*
- Two Workforce Investment Council Business Services committee meetings – members of this committee include private sector representatives, Clackamas*

*Community College, Clackamas County, Oregon Employment Department, and Clackamas Business and Economic Development.*

- *One-on-one meetings with representatives from Clackamas County Business and Economic Development, Clackamas Community College, Oregon Employment Department, Community Solutions for Clackamas County, Express Employment Professionals.*

*Additional feedback was received both formally and informally while in meetings and via email.*

*Finally, prior to publicly noticing the plan, the draft was shared electronically with multiple partners for review and input.*

*How you will monitor the implementation of your plan?*

*At least quarterly the Leadership Team and the One Stop Operator Partner group will review the goals and outcomes identified and outlined in the plan and the progress made toward reaching the goals. The Workforce Investment Council will prepare an annual report in June to the board on the progress made toward achieving the goals. These reports will include input from the partners, providers and staff. The CWRC WorkSource Clackamas team will meet regularly to discuss progress, goals, and identify new strategies.*

*Who will participate and how?*

The local team is comprised of representatives from the Workforce Investment Council, Oregon Employment Department, Clackamas Community College, Community Solutions for Clackamas County, Clackamas County Business and Economic Development. The existing leadership team will be expanded to include economic development partners at meetings once a month to discuss the plan and its implementation. In addition to the leadership team, the Partner/One Stop Operator group will play a role in reviewing progress and discussing how to engage and reduce barriers for multiple populations in obtaining the NCRC. Representatives on this team include the Workforce Investment Council, Oregon Employment Department, Clackamas Community College, Oregon Vocational Rehabilitation Services, Job Corps, Oregon Department of Human Services, Easter Seals Oregon, Immigrant and Refugee Community Organization, Express Employment Professionals, the Housing Authority of Clackamas County, and Clackamas County Community Corrections. All partners who work with employers will receive training and support in obtaining Letters of Commitment to prefer the NCRC in hiring.

**Barriers and Challenges.** Please describe the specific barriers/challenges that get in the way of implementation of your plan. Please be as detailed and specific as possible. For each challenge/barrier, please indicate the root cause of the problem: state or federal laws, policies or regulations, local policies, state or local practices.

<i>Barrier</i>	<i>Root Cause</i>
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<i>Lack of physical space</i>	<i>Small Employment Department owned building</i>
<i>Agency and funding silos (prevent flexibility and innovation)</i>	<i>Competing mandates</i>
<i>Inconsistent benchmarks and outcome goals among partners</i>	<i>Assigned goals differ from program to program</i>
<i>Capacity</i>	<i>Declining resources and unfunded mandates</i>
<i>Work experience mismatch, or skill gaps and lack of experience</i>	<i>Business' willingness and ability to hire inexperienced candidates, and industry needs changing</i>
<i>Economy</i>	<i>Limited jobs and changing demands</i>
<i>Geography</i>	<i>Serving people living in rural Clackamas County</i>

**Logic Model.** Please provide a logic model for your plan that shows all of the inputs and outcomes that will lead to your outcomes and goals.

- *Strategy 1: Assessment - Identify current skill levels of job seekers and training participants through informal interviews, career advisement, occupation and skills explorers, and foundational skills review.*
- *Strategy 2: Career Readiness and Preparation- Connect participants to career readiness preparation and certificate programs such as apprenticeship programs, NCRC, and Career Pathways programs.*
- *Strategy 3: Job Placement Via sector engagement, place participants with the skills and qualifications to meet the needs of employers in the identified sectors through job development, OJT, and certified work experiences.*

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<b>Sector Strategies</b>	Agency/Program	Resources	Activities	Outcomes
Manufacturing and Health Care	Workforce Investment Council	<ul style="list-style-type: none"> <li>• Key program staff</li> <li>• Technical assistance support</li> <li>• Industry Engagement Model</li> <li>• Columbia Willamette Workforce Collaborative</li> <li>• Workforce Investment Act funds</li> <li>• Competitive grant funds</li> </ul>	Engage employers through the Collaborative model.	<ul style="list-style-type: none"> <li>• Employers are engaged and workforce needs are addressed and improved.</li> <li>• The investments of the Workforce Investment Council are targeted to high demand positions and the needs of industry.</li> <li>• There is a shared approach to working with the Portland metropolitan labor shed across jurisdictional workforce board boundaries.</li> <li>• More skilled participants are hired into in-demand positions.</li> <li>• Partners will be better informed about industry employment needs.</li> </ul>
	Oregon Employment Department	<ul style="list-style-type: none"> <li>• Access to employers</li> <li>• Business Team</li> <li>• Financial resources</li> </ul>	<ul style="list-style-type: none"> <li>• Engage and share information with employers.</li> </ul>	Same as above
	Community Solutions for	<ul style="list-style-type: none"> <li>• Access to employers through Job Developers</li> </ul>	<ul style="list-style-type: none"> <li>• Engage and share information with</li> </ul>	Same as above

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	Clackamas County	<ul style="list-style-type: none"> <li>Multiple funding streams</li> <li>-DHS/JOBS Contract</li> <li>-Corrections Funding</li> <li>-Clackamas County funding</li> <li>-WIA funds</li> </ul>	employers.	
	Clackamas Community College	<ul style="list-style-type: none"> <li>Customized Training Department</li> <li>Access to employers through multiple avenues including the curriculum advisory committees</li> </ul>	<ul style="list-style-type: none"> <li>Engage and share information with employers.</li> </ul>	Same as above
	Clackamas ESD	<ul style="list-style-type: none"> <li>Access to employers</li> <li>Summer Youth Academy program that connects youth with area employers</li> </ul>	<ul style="list-style-type: none"> <li>Engage and share information with employers.</li> </ul>	Same as above
	Express Employment Professionals	<ul style="list-style-type: none"> <li>Strong relationship with more employers</li> </ul>	<ul style="list-style-type: none"> <li>Engage and share information with employers.</li> </ul>	Same as above
	Clackamas County Business and Economic Development	<ul style="list-style-type: none"> <li>Initial contact for potential new employers to the area</li> <li>Relationships with existing employers</li> </ul>	<ul style="list-style-type: none"> <li>Engage and share information with employers.</li> </ul>	Same as above
<b>Certified Work Ready Communities</b>	Agency/Program	Resources	Activities	Outcomes
	Workforce Investment Council	<ul style="list-style-type: none"> <li>WIA funding</li> <li>Relationships and partnerships with a variety of employment and economic development focused boards and commissions</li> <li>Consortium and partner committee involvement</li> <li>Workforce Investment Council</li> </ul>	<ul style="list-style-type: none"> <li>Train staff to proctor and conduct employer outreach</li> <li>Require a signed letter of commitment to prefer the NCRC in hiring by employers who participate in OJT, CWE</li> </ul>	<p>Region 15 becomes a Certified Work Ready Community by June 30, 2015 by accomplishing the following goals:</p> <p>Current Worker NCRC</p>

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		Board of Directors	<p>and internships for Adult, Dislocated Worker, and Youth programs</p> <ul style="list-style-type: none"> <li>• Build partnerships to assist with referrals, testing, and outreach</li> <li>• Educate employers and targeted job seekers on the value of NCRC Plus</li> </ul>	<p>goal: 67</p> <p>Emerging workforce NCRC goal: 708</p> <p>Transitioning worker NCRC goal: 2,155</p> <p>Letters of Commitment obtained from employers: 302</p>
	Oregon Employment Department	<ul style="list-style-type: none"> <li>• Testing space</li> <li>• Business Team outreach for letters of commitment</li> <li>• Welcome team promotion of NCRC</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> </ul>	Same as above
	Community Solutions for Clackamas County	<ul style="list-style-type: none"> <li>• Job Developers outreach for obtaining letters of commitment from employers</li> <li>• Staff referrals to testing and training programs</li> <li>• Testing space</li> <li>• Trained proctors</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for NCRC test takers</li> </ul>	Same as above
	Education partners: Clackamas	<ul style="list-style-type: none"> <li>• Trained staff</li> <li>• Employment team outreach for</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> </ul>	Same as above

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	Community College and Clackamas ESD	<p>letters of commitment</p> <ul style="list-style-type: none"> <li>• Testing space</li> <li>• Trained proctors</li> <li>• Access to the emerging and transitioning workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for NCRC test takers as necessary</li> </ul>	
	Additional Partners: DHS, Easter Seals, Express Employment Professionals	<ul style="list-style-type: none"> <li>• Trained staff</li> <li>• Testing space</li> <li>• Emerging and Transitioning Workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for NCRC test takers</li> <li>• Outreach sessions to outlying communities in rural areas</li> </ul>	Same as above
	Clackamas County Business and Economic Development	<ul style="list-style-type: none"> <li>• Access to employers</li> </ul>	<ul style="list-style-type: none"> <li>• Inform and educate employers on the benefits of preferring the NCRC in hiring</li> </ul>	Same as above
	Business Partners: CCBA, Express Personnel, Manufacturing	<ul style="list-style-type: none"> <li>• Access to employers and industry knowledge</li> <li>• Help obtain letters of commitment from employers</li> </ul>	<ul style="list-style-type: none"> <li>• Promote the NCRC as a tool used in hiring</li> </ul>	Same as above

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	21, Chambers of Commerce, etc.	preferring the NCRC		
<b>System Innovation</b>				
<b>Strategy</b>	<b>Agency/Program</b>	<b>Resources</b>	<b>Activities</b>	<b>Outcomes</b>
<i>Strategy 1</i>	Workforce Investment Council	<ul style="list-style-type: none"> <li>• Key program staff</li> <li>• Technical assistance support</li> <li>• Workforce Investment Act funds</li> <li>• Competitive grant funds</li> <li>• Oregon CIS program</li> </ul>	<ul style="list-style-type: none"> <li>• Train staff</li> <li>• Build partnerships with community organizations and private sector partners to assist with skill identification</li> </ul>	<ul style="list-style-type: none"> <li>• By increased skill identification, better referrals to trainings and employers can occur</li> <li>• Job seekers gain more information about their skill level and resources to build additional skills</li> </ul>
<i>Strategy 1</i>	Oregon Employment Department	<ul style="list-style-type: none"> <li>• Welcome Team staff – trained</li> <li>• Wagner-Peyser funding</li> <li>• Initial Skills Review/ WIN Courseware</li> <li>• Oregon CIS program</li> </ul>	<ul style="list-style-type: none"> <li>• Provide next steps planning with each participant</li> <li>• Refer to WIN courseware</li> <li>• Refer to partner staff for skill identification</li> </ul>	Same as above
<i>Strategy 1</i>	Community Solutions	<ul style="list-style-type: none"> <li>• Initial Skills Review/ WIN Courseware</li> <li>• Oregon CIS program</li> <li>• Trained job developers/coaches</li> <li>• Multiple funding streams and programs</li> </ul>	<ul style="list-style-type: none"> <li>• Provide next steps planning with each participant</li> <li>• Refer to WIN courseware</li> <li>• Refer to partner staff for skill identification</li> </ul>	Same as above
<i>Strategy 1</i>	Clackamas Community College	<ul style="list-style-type: none"> <li>• Adult Basic Education training</li> <li>• Career Counseling center</li> </ul>	<ul style="list-style-type: none"> <li>• Refer to WIN courseware</li> <li>• Individual interviews to</li> </ul>	Same as above

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		<ul style="list-style-type: none"> <li>• Workforce Department</li> </ul>	<ul style="list-style-type: none"> <li>• identify skills</li> <li>• Career counseling</li> </ul>	
Strategy 1	DHS	<ul style="list-style-type: none"> <li>• Employability Assessment</li> <li>• Participant screening</li> </ul>	<ul style="list-style-type: none"> <li>• Provide next steps planning with each participant</li> <li>• Refer to WIN courseware</li> <li>• Refer to partner staff for skill identification</li> </ul>	Same as above
Strategy 1	Clackamas ESD	<ul style="list-style-type: none"> <li>• C-TEC program staff and resources</li> </ul>	<ul style="list-style-type: none"> <li>• Refer to WIN courseware</li> <li>• CASAS basic skills test</li> <li>• Case management to build an Individual Service Plan which includes interviews to identify skills and career counseling</li> </ul>	Same as above
Strategy 2	Workforce Investment Council	<ul style="list-style-type: none"> <li>• WIA funding</li> <li>• Relationships and partnerships with a variety of employment and economic development focused boards and commissions</li> <li>• Consortium and partner committee involvement</li> <li>• Workforce Investment Council Board of Directors</li> </ul>	<ul style="list-style-type: none"> <li>• Train staff to proctor and conduct employer outreach</li> <li>• Require a signed letter of commitment to prefer the NCRC in hiring by employers who participate in OJT, CWE and internships for Adult, Dislocated Worker, and Youth programs</li> <li>• Build partnerships to assist with referrals, testing, and outreach</li> <li>• Educate employers and targeted job seekers on</li> </ul>	<ul style="list-style-type: none"> <li>• Improve employment matches between job seekers and businesses</li> <li>• Businesses have a stronger applicant pool</li> <li>• Job seekers will have more opportunities as they are able to articulate their skills</li> <li>• Increased retention</li> <li>• Increase the marketability of the</li> </ul>

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			the value of NCRC Plus	region for economic development efforts <ul style="list-style-type: none"> <li>• Region 15 will become a work ready community</li> </ul>
Strategy 2	Oregon Employment Department	<ul style="list-style-type: none"> <li>• Testing space</li> <li>• Business Team outreach for letters of commitment</li> <li>• Welcome team promotion of NCRC</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> </ul>	Same as above
Strategy 2	Community Solutions	<ul style="list-style-type: none"> <li>• Job Developers outreach for obtaining letters of commitment from employers</li> <li>• Staff referrals to testing and training programs</li> <li>• Testing space</li> <li>• Trained proctors</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for</li> </ul>	Same as above

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			NCRC test takers	
<i>Strategy 2</i>	Education partners: Clackamas Community College and Clackamas ESD	<ul style="list-style-type: none"> <li>• Trained staff</li> <li>• Employment team outreach for letters of commitment</li> <li>• Testing space</li> <li>• Trained proctors</li> <li>• Emerging and Transitioning Workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for NCRC test takers are necessary</li> </ul>	Same as above
<i>Strategy 2</i>	Additional Partners: DHS, Easter Seals, Express Employment Professionals	<ul style="list-style-type: none"> <li>• Trained staff</li> <li>• Testing space</li> <li>• Emerging and Transitioning Workforce</li> </ul>	<ul style="list-style-type: none"> <li>• Staff referrals to testing and training programs</li> <li>• Counsel job seekers on marketing their NCRC</li> <li>• Promote NCRC among employers</li> <li>• Implement soft skills assessment as part of the NCRC Plus</li> <li>• Provide proctoring for NCRC test takers</li> <li>• Outreach sessions to outlying communities in rural areas</li> </ul>	Same as above

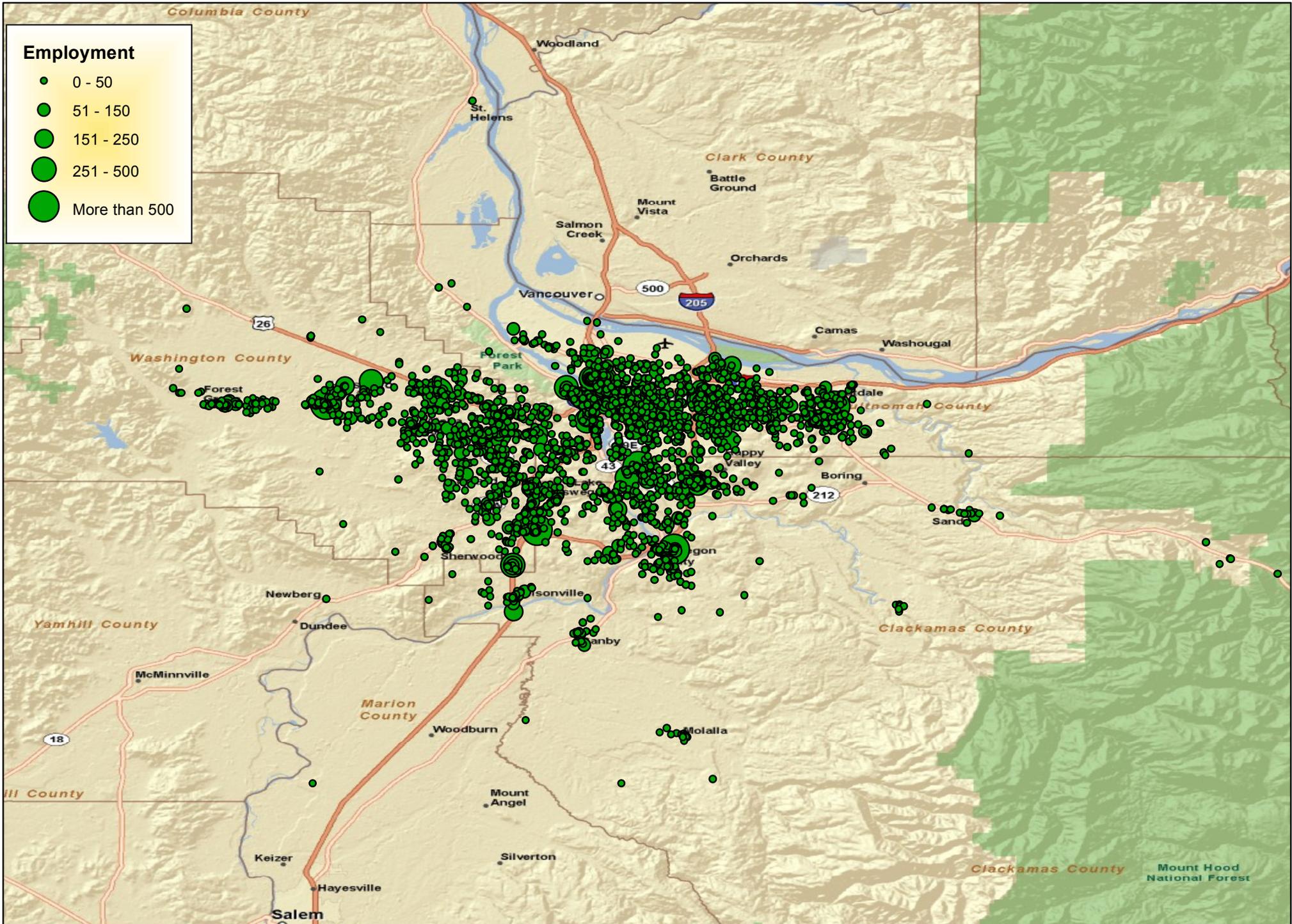
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Strategy 2	Economic Development	<ul style="list-style-type: none"> <li>• Employer outreach for obtaining letters of commitment for the NCRC</li> </ul>	<ul style="list-style-type: none"> <li>• Talk to employers about preferring the NCRC in hiring practices</li> </ul>	Same as above
Strategy 2	Business Partners: CCBA, Express Personnel, Manufacturing 21, Chambers of Commerce, etc.	<ul style="list-style-type: none"> <li>• Access to employers and industry knowledge</li> <li>• Help obtain letters of commitment from employers preferring the NCRC</li> </ul>	<ul style="list-style-type: none"> <li>• Promote the NCRC as a tool used in hiring</li> </ul>	Same as above
Strategy 3	Workforce Investment Council	<ul style="list-style-type: none"> <li>• WIA formula and competitive funding</li> <li>• Knowledgeable staff</li> <li>• Strong employer partnerships</li> </ul>	<ul style="list-style-type: none"> <li>• Train staff</li> <li>• Publish the Strategic Occupations List</li> <li>• Provide information from the Columbia Willamette Workforce Collaborative on key industries</li> <li>• Engage industry groups to promote services</li> <li>• Resource development</li> </ul>	<ul style="list-style-type: none"> <li>• Increase job placements</li> <li>• Wage gain</li> <li>• Job retention</li> <li>• Job advancement</li> <li>• Employer growth and satisfaction</li> <li>• Stable funding</li> <li>• Decreased unemployment rate</li> </ul>
Strategy 3	Oregon Employment Department	<ul style="list-style-type: none"> <li>• Access to employers</li> <li>• Participant pools</li> </ul>	<ul style="list-style-type: none"> <li>• Business and Employment Team promotes job placement services to employers</li> <li>• iMatch Skills</li> <li>• Targeted outreach to iMS job postings that are open for extended periods of time</li> <li>• Recruitment events</li> </ul>	Same as above

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			<ul style="list-style-type: none"> <li>Promote job seeker tools</li> </ul>	
<i>Strategy 3</i>	Community Solutions	<ul style="list-style-type: none"> <li>Access to employers through Job Developers</li> <li>Participant pools</li> </ul>	<ul style="list-style-type: none"> <li>Promote job seeker tools</li> <li>Inform employers about WorkSource products</li> <li>Secure job placements</li> </ul>	Same as above
<i>Strategy 3</i>	Clackamas Community College	<ul style="list-style-type: none"> <li>Access to employers</li> <li>Participant pools</li> </ul>	<ul style="list-style-type: none"> <li>Promote job seeker tools</li> <li>Inform employers about WorkSource products</li> <li>Secure job placements</li> </ul>	Same as above
<i>Strategy 3</i>	DHS	<ul style="list-style-type: none"> <li>Participant pools</li> <li>Funding OFSET and TANF</li> </ul>	<ul style="list-style-type: none"> <li>Promote job seeker tools</li> </ul>	Same as above
<i>Strategy 3</i>	Economic Development	<ul style="list-style-type: none"> <li>Access to employers</li> </ul>	<ul style="list-style-type: none"> <li>Inform the system of industry openings and growth</li> </ul>	Same as above
<i>Strategy 3</i>	Apprenticeship Programs: Oregon Tradeswomen	<ul style="list-style-type: none"> <li>Access to employers</li> <li>Funding for scholarships</li> </ul>	<ul style="list-style-type: none"> <li>Secure job placements</li> <li>Train job seekers</li> </ul>	Same as above

# Health Care (621,622,623) in Portland Metro, 2010





PORTLAND METRO – SOUTHWEST WASHINGTON

# Regional Health Care Workforce Report

An Industry Update from the  
Columbia-Willamette Workforce Collaborative

June 2012





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## This Report: A Local Snapshot

State- and county-level workforce analysis is inadequate to capture the characteristics and trends of our region's workforce. Our metro area has a mobile population, not afraid to cross county and state lines to work. The Columbia-Willamette Workforce Collaborative, therefore, takes a regional approach to researching, analyzing, and strategizing with local industry about workforce issues because we have a common labor pool and a truly regional employment marketplace. This report compiles information specific to our six-county region, and combines two types of local data – a regional industry employer survey, integrated with local labor market data – to give a clear view of job opportunities, growth, and training needs in our region for the area's fastest-growing sector: health care.

## The Columbia-Willamette Workforce Collaborative

With an area of more than 6,600 square miles, a population over 2.2 million, a workforce of nearly 1.7 million, more than 50,000 businesses, two states, and six counties, the Portland-Vancouver Metropolitan Area is a vibrant, diverse, and complex region.

In full appreciation of the unique local jurisdictions that comprise the region, we believe there are significant advantages to building a regional approach to workforce development and talent management. The quality of the region's workforce is a primary driver of economic development and the region's overall economic health. We know that the regions which most effectively manage their talent are likely to be more competitive and attract the quality of jobs people need to support themselves and their families. We understand 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. We know we need 21st century solutions to solve 21st century problems.

To this end, the Workforce Investment Boards representing the Portland – Vancouver metropolitan area have developed a unified approach to serve industry, support economic development and guide public workforce investments. The Columbia-Willamette Workforce 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, and to link workforce supply and industry demand. Partners in the Collaborative are:

- Southwest Washington Workforce Development Council (Clark, Cowlitz, Wahkiakum Counties)
- Workforce Investment Council of Clackamas County (Clackamas County)
- Worksystems, Inc. (City of Portland, Multnomah, and Washington Counties)



## Data Sources

### Local Employers' Input

In 2011, the Collaborative conducted a survey unique to the regional laborshed. More than 250 responses from local employers and industry associations included input from several levels of management and administration—executives, human resource directors and department directors. Responses were analyzed not only by facility type and size of employer, but also by position within the organization, which provides a better understanding and refinement of market segmentation based on specific needs.

Respondents included:

Avamere Sherwood Operations LLC • Care Center Health & Specialty Center • Cascadia Behavioral Healthcare Inc. • Cherry Blossom College • Forest Grove Rehabilitation and Care Center • Good Samaritan Society, Fairlawn Village • Harmony Guest Home • Kaiser Permanente Northwest • Lawrence Convalescence Center • Marquis Care at Centennial • Multnomah County Health Department • Oregon Reproductive Medicine • Pacific Gardens • Parkview Christian Retirement Community • Prestige Care, Inc. • Providence Elder Place • Providence Health and Services • PSA Health Care • Services for All Generation Enterprises • Sinai Family Home Services • Southwest Washington Medical Center • Terwilliger Plaza • The Portland Clinic • Walgreen Company • Washington County • Washington State Employment Security Department

Respondents to the survey represent a cross section of health care providers in the region, and the majority of respondents have worked in the health care industry more than 20 years.

### Labor Market Data

Survey results were analyzed in conjunction with data from the Economic Modeling Specialists, Inc. (EMSI), Integrated Postsecondary Education Data System (IPEDS), Job Corps, Oregon Bureau of Labor and Industries (BOLI), Oregon Department of Education (ODE), Oregon Employment Department (OED), Oregon Healthcare Workforce Institute (OHWI), and Washington State Employment Security Department (ESD). These sources provided on-the-ground information regarding 31 fields of health care training, training completer data, projected job growth and openings, and workforce demographic data.

## Executive Summary

Research and data analysis indicate that the health care sector will continue to thrive and grow in the Portland-Vancouver metro area over the next five years. The metro area laborshed includes highly skilled health care practitioners, clinicians and technicians. The region's health care training programs are for the most part producing an adequate number of credentialed individuals to meet the projected demand for certified workers. While many comparable metro areas across the country face urgent shortages in core occupations like Registered Nurses and Medical Laboratory Technicians, the Portland-Vancouver area has been safeguarded from such shortages by a responsive system of post-secondary institutions that has adapted and expanded training programs to keep up with anticipated demand. The region was also safeguarded from many of these shortages due to the significant number of individuals who chose to enter training during the Great Recession. In recessions, individuals often seek a greater economic path through training when employment is not a short-term option; increased health care training was one beneficiary of this additional demand.

While the metro area does not currently face major occupational shortages, certain policy, demographic, and economic trends will impact the skills required of the health care workforce locally, largely mirroring patterns across the state and nation. Trends will necessitate the re-training and continued education of practicing health professionals, and the augmentation or re-structuring of credentialing programs to incorporate key skills brought to relevance by circumstances, including:

- ▶ **National Health Care Reform:** The Affordable Care Act (ACA) will increase the total number of insured residents and place greater demand on local health care organizations. ACA also requires health care organizations to move away from paper and toward electronic health records (EHR).
- ▶ **Coordinated Care in Oregon:** In an attempt to lower costs, Oregon will restructure the way Medicaid services are delivered state-wide by shifting spending toward prevention and chronic illness management, and away from emergency visits. Coordinated Care Organizations will emphasize team-based and patient-centered care.
- ▶ **Demographic Shifts:** Our population will trend older with longer life expectancies, and will be more racially and ethnically diverse.
- ▶ **ICD-10:** The U.S. will inevitably adopt this international medical classification language established by the World Health Organization, though adoption has been postponed again.

With these trends impacting workforce demands, local employers participating in our 2011 survey identified the following skill enhancement, recruitment, and training priorities:

- ▶ **Enhanced/Specialized Skills and Knowledge** (for both the existing workforce and credential-seekers):
  - Specialization in Geriatric Care
  - Computer Skills and Electronic Health Records Training
  - Cultural Competency and Bilingual Skills
  - Collaboration/Communication/Teamwork Skills (for delivery of team-based care).





► **Recruitment, Training and Retention of Diverse Workers:**

- The Portland-Vancouver metro area’s demographic trends mirror the country’s: the overall metro area population is in the midst of an 18 percent increase (2001 through 2021), with well over half of the increase (59 percent) coming from minority populations. As the consumer population diversifies, it will be increasingly important for the workforce to reflect the population being served.

► **Leadership Training for Succession Planning and Retention:**

- Long-tenured clinicians, talented in care delivery, do not necessarily have management skills. The industry faces a leadership gap as the health care workforce ages into retirement along with the rest of the population, and significant supervisory training will be required to train the next generation to run systems and manage people. Leadership development and retention initiatives are high priorities in long-term care, where high attrition forces employers to constantly re-hire and train.

► **Coding:**

- All relevant health workers will have to learn ICD-10 and change the way they currently code diseases, symptoms, external causes, and many other factors to get reimbursed for services delivered.

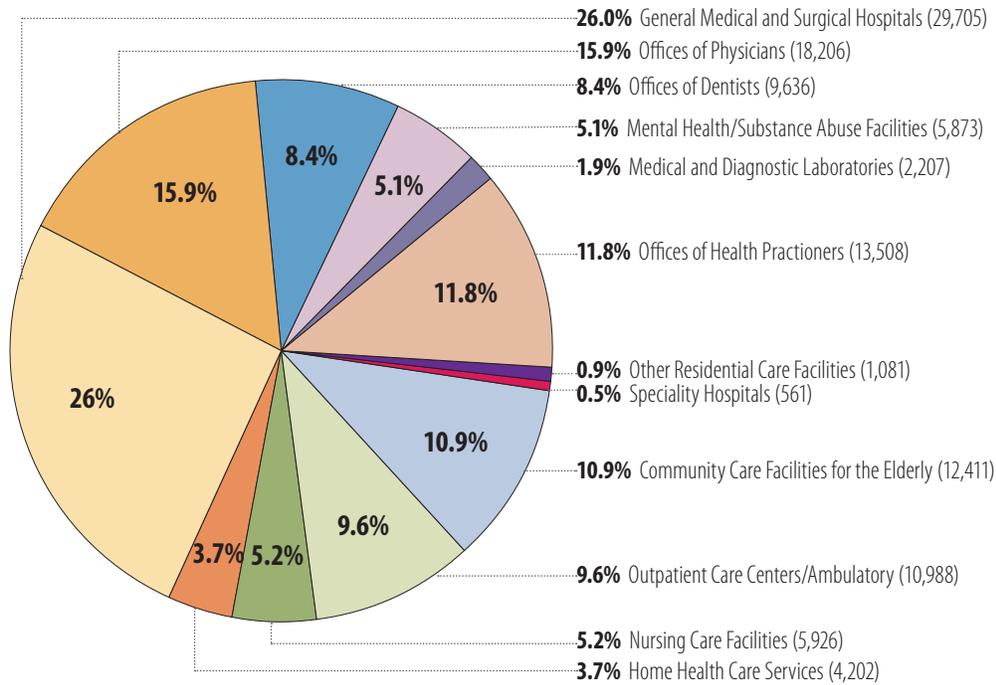
► **Non-Traditional Health Workers (NTHWs):**

- With Coordinated Care emerging in Oregon and a focus on prevention, our region will experience a growing need for Community Health Workers, Peer Wellness Specialists, and Personal Health Navigators.

This report provides an overview of health care labor market information and regional training capacity for key health careers, supplemented with background data from the employer survey that supports the training and workforce needs described above.

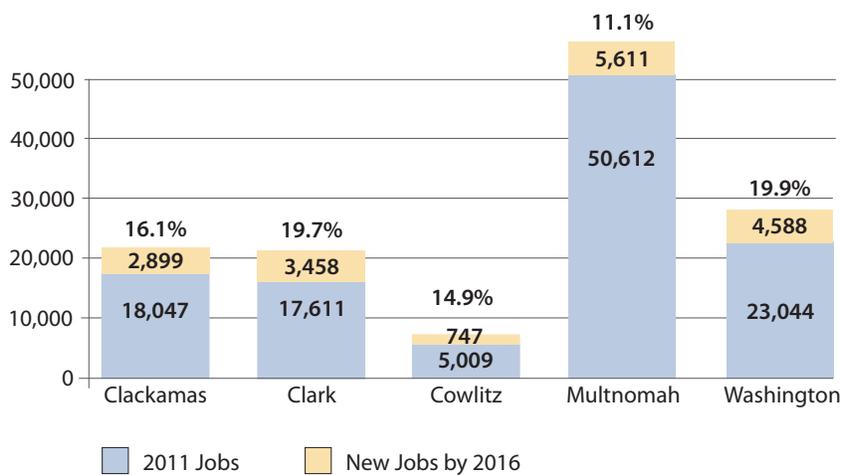
# Workforce Snapshot

## 2011 Health Care Industry: Employment by Sector



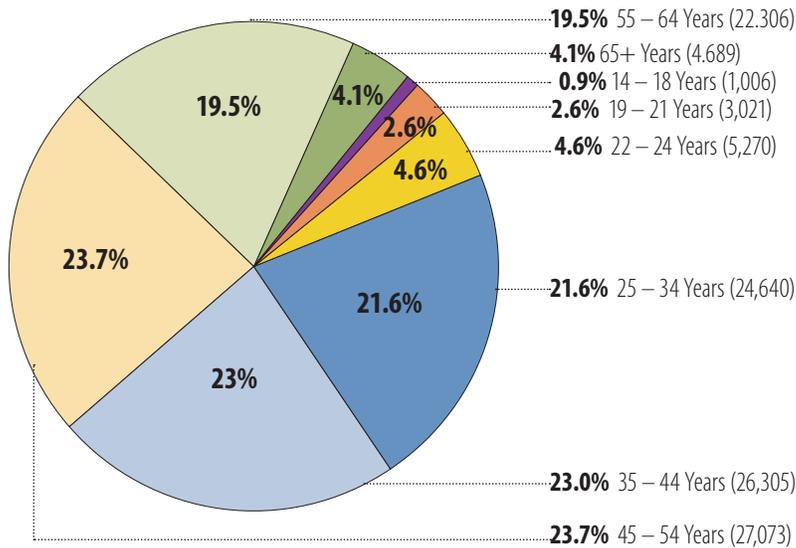
**Of Note:** The average industry wage across the metro area is \$61,026 annually.

## Health Care Employment and Projected Growth by County



**Of Note:** Washington County is projected to have 19.9 percent total industry growth over 5 years, the highest growth rate in the region. These data do not include openings due to replacement/retirement.

## 2011 Health Care Industry: Employment by Age



**Overall, 47.3 percent of the health care workforce is 45+, including nearly a quarter of the workforce over 55.** This is a high rate compared to other industries: only 39.8 percent of the local Software/IT industry is 45+. The nursing continuum trends older than most other occupations:

- 61.8 percent of RNs are 45+, including 29.5% who are 55+
- 54 percent of LPNs are 45+, including 30% who are 55+

**Employment in Nursing Care Facilities and via Home Health Care is far less prevalent per capita (47 percent and 37 percent of average, respectively) in our region than in other regions around the country.** The Portland-Vancouver metro area, on the other hand, has a significantly greater prevalence of employment per capita in Community Care Facilities for the elderly (over 200 percent the national average). These Community Care Facilities tend to be assisted living facilities with many social and recreational services that also have nursing facilities onsite, but where nursing is not necessarily the primary service delivered.

While direct patient care and diagnostics make up most of the health care workforce, **there are a large number of non-medical jobs significant to the health care industry** because they provide support to the operations, including:

- Food prep/servers (998 jobs)
- Maids/Housekeepers (957)
- Recreation Workers (553)
- Cooks (485)
- Maintenance/Repair (411)

# Training Snapshot

While it is clear that fields like nursing that are in demand, the data reveal that we currently have adequate graduates to fill local needs. For the most part, our region's training providers have successfully stayed ahead of demand by expanding program offerings in anticipation of growth. As you can see from this chart, there are very few occupations for which growth is outpacing the credentialing rate. Completer information below reflects 2010 graduates from directly related, formal, local programs and is not a complete indicator of labor supply. Only those programs represented in the IPEDS database and through ODE are included.<sup>1</sup>

## Regional Training and Degree Program Graduate Data

Graduates and credentials compared with expected openings and 2011 employment figures				Types of credentials granted			
Occupational Training	2011 Cluster Jobs	Annual Openings 2011-16 <sup>2</sup>	Annual Completers 2010	Cred <2years	AAS	BS	MS
Registered Nurse	14,277	872	1,140	0	400	774	0
Medical Office Admin/Reception/Coding & Billing	13,429	1,151	439	394	45	0	0
Nursing Aides, inc. Home Health Aides & CNAs	11,244	656	1,504	1,504	0	0	0
Medical Assistant	4,025	201	1,259	1,059	200	0	0
Dental Assistant	3,076	166	413	413	0	0	0
Pharmacy Technician	2,790	190	291	284	7	0	0
Dental Hygienist	1,670	91	86	0	57	29	0
Health Information/Records Technician	1,380	69	65	44	21	0	0
Radiologic Technician/Radiation Therapist	1,250	57	55	1	46	8	8
EMT/Paramedic	1,116	69	26	2	24	0	0
Licensed Practical Nurse	1,111	76	283	283	0	0	0
Mental Health/Substance Abuse Counselor	1,052	118	104	9	46	0	49
Medical Administrator/Health Service Managers	1,032	72	128	0	81	17	30
Physical Therapy Technician	679	35	23	0	23	0	0
Dieticians	632	48	28	0	0	0	28
Medical Laboratory Technician/Assistant	522	42	40	13	27	0	0
Occupational Therapist	446	32	36	0	0	6	30
Surgical Technician/Technologist	439	40	62	47	15	0	0
Respiratory Therapist	373	30	29	0	29	0	0
Physician Assistant	290	30	82	0	0	3	79
Dental Lab Technician	141	20	15	5	10	0	0

1 CNA/Nursing Aide completer data reflects 2010 completer data from Integrated Postsecondary Education Data System (IPEDS) and ODE, but is also supplemented with 2009 completer data from OHWI's 2010 report.

2 Annual Openings listed here include growth and replacement/retirement jobs, but do not account for everyday hires and separations (job churn).

**Of Note:** Applicants to Washington state LPN and RN programs are often required to hold a current license as a certified nurse assistant (CNA). Not all CNA completers are vying for those same openings.



## Occupational Demand and Training Analysis

### The “Nursing Crisis”

The widespread nursing crisis is not a problem locally—yet. A projected nursing shortage a decade ago caused local nursing programs to ramp up output of credentialed nurses, particularly in Bachelor of Science in Nursing programs. This has created a scenario in the metro area where a national shortage of nurses has little relevance on the ground. In fact, as health organizations face budget challenges and decrease nursing residency programs, opportunities for freshly trained nurses have waned, resulting in a fierce job market for recent nursing program graduates, many of whom are unemployed for a year or more after program completion. With nearly 30 percent of nurses age 55+, however, there is a looming retirement boom that will create a lot of opportunity in this field.

### An Adaptive Post-Secondary Community

EMTs/Paramedics and Medical Technologists are both in high demand, but 2010 completer data indicate a lack of training capacity locally. In 2010, there were no bachelor’s degree programs that would fill the annual regional demand for 58 Medical and Clinical Laboratory Technologists. In response to this need and indicative of responsive regional training providers, a joint Oregon Institute of Technology-Oregon Health Sciences University Clinical Laboratory Science program will kick off at OIT’s Wilsonville campus in September 2012 to help fill this void. Similarly, OIT’s Wilsonville campus will host a new AAS Paramedic program starting in June 2012 to meet the labor gap indicated on page 9.

### Advanced Practice Nurses

Because labor demand does not yet account for advanced practice nurses, this set of specialty occupations is not included in the chart on page 9. There is clearly demand for mid-level providers, however, as seen in the Physician Assistant demand data. IPEDS indicate that the region trained at least 71 Master-level nurses in 2010.

## Overtraining

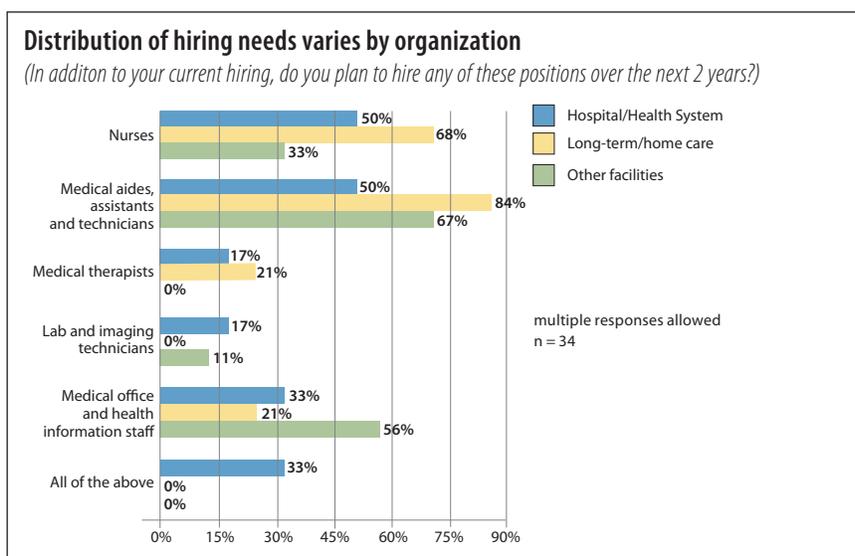
For a number of occupations (including Medical Assistants, LPNs, Dental Assistants, and Pharmacy Technicians), our region is over-producing credentialed workers for the anticipated growth. There will be jobs available in these fields as they continue to be in demand, but people seeking to enter these fields should identify programs that have a track record of job placement, as competition will be extremely high (especially for jobs in the best facilities, and/or with the best pay and benefits).

**Of Note:** Our region is currently on track to train 6.3 Medical Assistants and 3.7 LPNs for each projected job opening.

## Training Gaps

There are currently no Electrocardiograph Technology, Medical Sonography, or Occupational Therapy Assistant AAS programs in our region despite the fact that the corresponding careers are all projected to grow.

Occupations with high demand but no local training program		
	2011 Cluster Jobs	Total Openings 2011-16
Electrocardiograph Technologists and Technicians	269	65
Medical Sonographers	262	65
Occupational Therapist Assistants and Aides	178	40

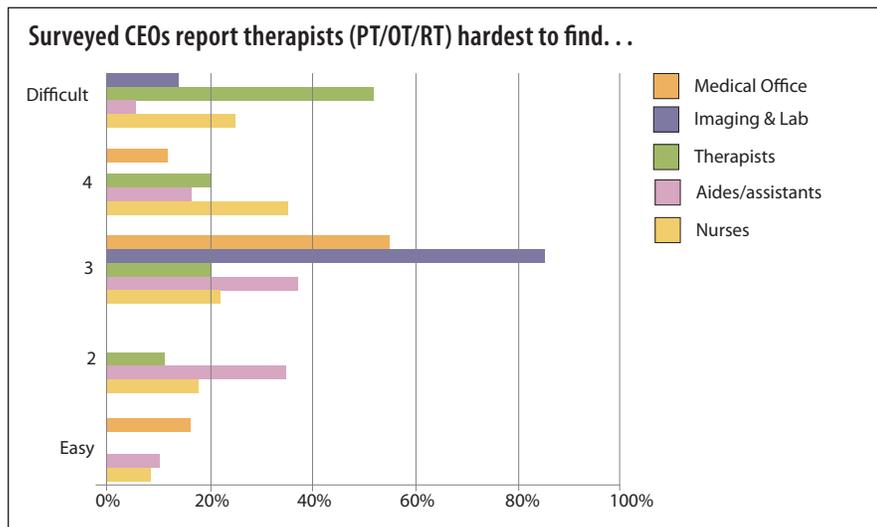


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## Hard-to-find Workers

Roughly 50 percent of health provider executives report Occupational, Physical, and Respiratory Therapists as “difficult” to find in the labor marketplace. The table below shows that regional production of credentials is staying roughly even with demand, but many of these highly skilled graduates likely return to their city of origin or move out of area after programs are complete, creating a gap in supply of these workers locally.



### Recruiting outside the region

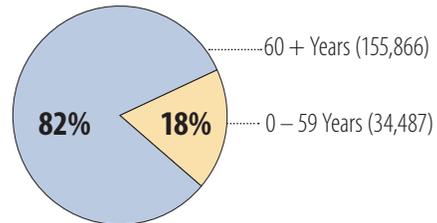
Our respondents indicated that most hiring comes from the local workforce, but for some job types, including health information technicians, as much as 50 to 75 percent of workers were recruited from outside the region.

# The Impact of Demographic Shifts on Required Skills of the Health Care Workforce

## Age

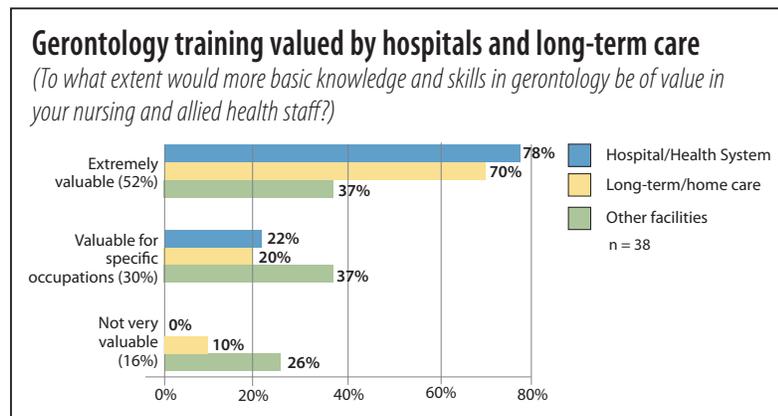
As exhibited in the chart of page 8, the health care workforce is aging. This mirrors the general population in the metro region: between 2011 and 2021, the metro population is due to grow by 8.6 percent (190,171 people added). The age profile will change to reflect the aging of the “baby boom” generation. Seniors (60+) will be 23 percent of the population in 2021, up from 18 percent in 2011; an increase of 155,686 individuals.

2011–2021 Population Growth by Age

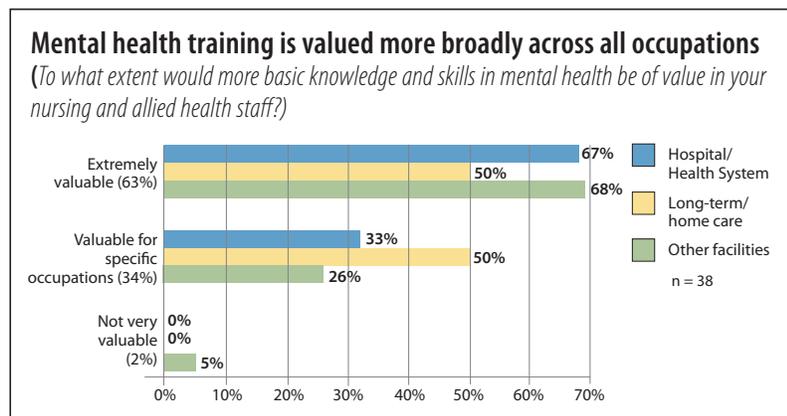


This disproportionate growth in the older population will necessitate a workforce that can respond to the needs of seniors with chronic medical conditions, including mental health concerns. Medical personnel will need to engage in preventive and proactive care strategies that keep older patients healthy and out of acute care and emergency settings.

Gerontology, Mental Health, and Nutrition training were highlighted by employers as priorities for new and existing workers.



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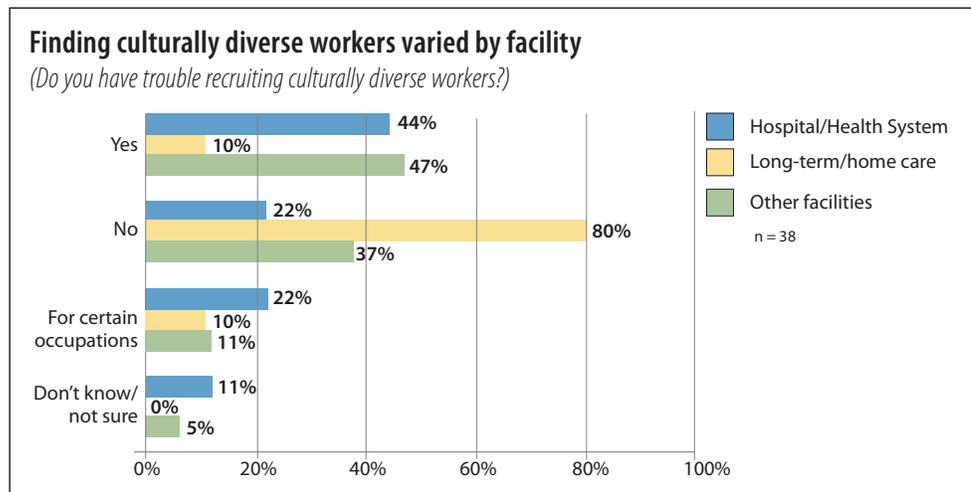


### Race and Ethnicity

Of the 190,171 people projected to be added to the metro area population by 2016, 59 percent are projected to come from racial and ethnic minority populations. Growth projections are especially high in the Hispanic community. This shift in the population will increase the value of workers who are culturally competent, bilingual, and who themselves come from the communities that are experiencing rapid growth.

Survey respondents cited a desire to have a more culturally diverse workforce. Hospital, health systems, and ambulatory care reported more difficulty in finding culturally diverse workers than long-term or home health care organizations. Culturally diverse workers were most difficult to find in middle skill occupations such as nursing, mental health counseling, and therapy, as well as supervisory and mid-management positions.

In follow-up conversations with survey respondents, many have highlighted a need for strategies to attract more culturally diverse and multilingual youth into health careers.



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# Other Employer-Identified Skills Required of the Health Care Workforce

## Technology

As the nation moves to adopt electronic health records (EHR), a quarter of survey respondents (especially hospitals and clinics) indicated that EHR will impact their workforce training strategy over the next two years. Thirty-six percent of respondents indicated they would seek outside training assistance to support EHR training. Many employers also indicated a need to train existing workers at all levels in basic or intermediate computer skills prior to EHR training.

## Supervisory Skills

Succession planning is a significant concern as the health care workforce ages, particularly for hospitals and health systems. Attrition is a large concern for long-term care facilities. As a result of these factors, employers indicated a need for supervisory training for new and existing workers.

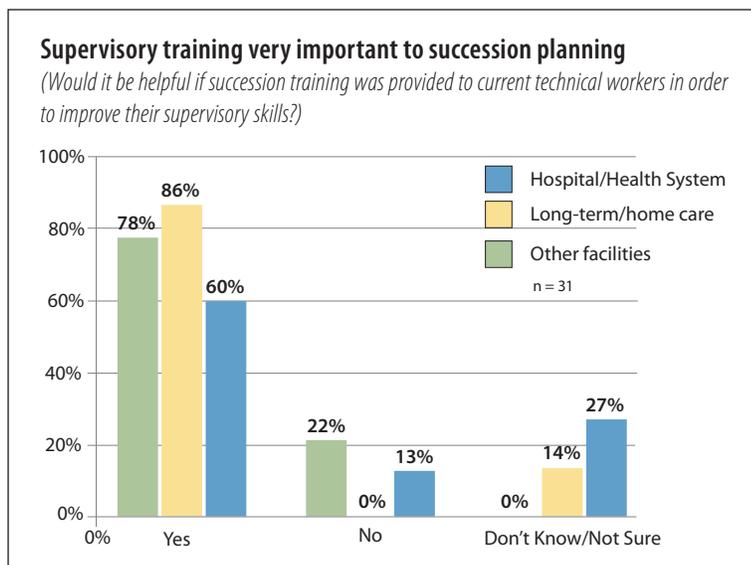
## ICD-10

Employers indicated a strong need for training in ICD-10, a new medical coding language. The greatest impact appears to be in hospitals and larger health care systems. Over 40 percent of survey respondents indicated they would be likely to seek training due to the new regulatory requirements around ICD-10. As ICD-10

diagnostic and procedure codes are used for insurance billing and reimbursement, it's especially imperative for larger health care systems to have staff well-trained in this area. While initially set to be implemented October 2013, as of this report's publication, ICD-10 implementation has been postponed beyond that date.

## Soft Skills/Communication/Teamwork

Employers indicated a widespread need to enhance soft skills for existing health care workers to prepare them for health care reforms, including coordinated and accountable care organizations, as well as changing patient demographics. Soft skills were identified in the survey as the most needed skills for incumbent workers, only behind technology. Specific skills most commonly named include customer service, verbal and written communication, teamwork, and conflict resolution.





## The Impact of Oregon’s Coordinated Care Framework on the Health Care Workforce

In 2012, the Oregon Legislature passed legislation to overhaul the delivery of Medicaid services for residents on the Oregon Health Plan. The ultimate goal of the overhaul is to provide superior care for less money through better alignment, more efficient delivery, and a focus on person-centered care and prevention. Key to the new delivery structure will be Coordinated Care Organizations governed by stakeholders including local health care providers and community members. Payment through this system will be based on health outcomes instead of services delivered, shifting the incentive away from expensive treatment and toward cost-effective prevention activities. CCOs will ensure alignment of mental health, primary, and dental care through a team-based approach.

Workforce impacts of the legislation are still largely unknown, but there are a few points to consider:

- Practitioners, clinicians, and other health care workers in team-based settings will be required to collaborate effectively, amplifying our survey respondents’ call for an increase in soft skills and teamwork strategies.
- There is a clear, but as yet unquantified, need for what the state calls “Non-Traditional Health Workers,” who will provide guidance to the community in roles that will bridge social and medical service delivery. Key roles within NTHW professions include:
  - 1) Outreach and Mobilization
  - 2) Community and Cultural Liaising
  - 3) Case Management, Care Coordination, and System Navigation
  - 4) Health Promotion and Coaching

The table on the next page summarizes these roles.

## Non-Traditional Health Workers and Their Roles

<p><b>Community Health Worker</b></p>	<p>An individual who promotes health or nutrition within the community in which the individual resides. Key functions include, but are not limited, to:</p> <ul style="list-style-type: none"> <li>• Serving as a liaison between communities, individuals and coordinated care organizations</li> <li>• Providing health or nutrition guidance and social assistance to community residents</li> <li>• Enhancing community residents' ability to effectively communicate with health providers</li> <li>• Providing culturally and linguistically appropriate health or nutrition education</li> </ul>
<p><b>Peer Wellness Specialist</b></p>	<p>An individual who provides peer-delivered services to an individual with similar life experience, under the supervision of a qualified Clinical Supervisor. A Peer Wellness Specialist must complete an Addictions and Mental Health-approved training program and be:</p> <ul style="list-style-type: none"> <li>• Trained to deliver physical health promotion, and disease prevention and intervention activities for individuals who experience mental health and substance abuse challenges and</li> <li>• A self-identified person in recovery from a substance use disorder, who meets the abstinence requirements for recovering staff in alcohol and other drug treatment programs</li> </ul> <p>or</p> <ul style="list-style-type: none"> <li>• A family member of an individual who is a current or former recipient of addiction or mental health services.</li> </ul>
<p><b>Peer Health Navigator</b></p>	<p>An individual who provides information, assistance, tools and support to enable a patient to make the best health care decisions in the person's particular circumstances and in light of the patient's needs, lifestyle, combinations of conditions and desired outcomes.</p>

Information from Oregon Health Authority's report "The Role of Traditional Health Workers in Oregon's Health Care System."

# Workforce Investment Boards

## WIBs

Workforce Investment Boards coordinate and leverage workforce strategies with education and economic development stakeholders within local communities, to ensure that state and local workforce development and job training programs meet the needs of employers. They aim to prepare and promote a highly skilled and adaptive workforce for a healthy, sustainable economy. The Portland Metro and Southwest Washington region is serviced by three boards: **Worksystems, Inc.** (City of Portland, Multnomah and Washington Counties), **Workforce Investment Council of Clackamas County** (Clackamas County), and the **Southwest Washington Workforce Development Council** (Clark, Cowlitz and Wahkiakum Counties).

## Collective Action = Collective Impact

The three boards align their capabilities and resources to improve the region's ability to leverage employment funding streams, coordinate job-search-and-hire strategies, and link workforce supply and demand. Together, they invest and oversee tens of millions of dollars in federal, state, and local employment and training resources. They are joined by labor, education, community-based and public sector members to form a unified point of contact for all local workforce development initiatives.

The Portland metro region WIBs have developed a unified approach to support industry and economic development and guide workforce investments within their common laborshed. This regional partnership aims to assure alignment and prioritize a collective response when it is in the best interest of the workers and businesses of the region.



# Acknowledgments

This report was made possible through the dedication of numerous health care, education, community-based, and workforce professionals who contributed their time, insight and effort over the course of many months. The authors would like to thank participating health care employers and associations for agreeing to be interviewed and for providing much of the industry data included in this report, especially Oregon Healthcare Workforce Institute. Leadership and support provided by the Columbia-Willamette Regional Workforce Collaborative.

Data gathered by Scruggs & Associates and Mesh Strategies. Report prepared by Donna Matrazzo and Jeanne Galick, Jordana Barclay (SWWDC), Nick Knudsen (WSI), Bridget Dazey (WICCO), and Annie Gannon (WICCO).

**Of Note:** Please contact your local Workforce Investment Board for more detailed survey summaries at

- [www.swwdc.org](http://www.swwdc.org)
- [www.wicco.org](http://www.wicco.org)
- [www.worksystems.org](http://www.worksystems.org)



## For More Information

### **Southwest Washington Workforce Development Council**

SWWDC is one of 12 Workforce Development Councils in Washington state. The council's mission is to prepare and promote a highly skilled and adaptive workforce for a healthy, sustainable economy in Southwest Washington.

Southwest Washington Workforce Development Council  
805 Broadway | Suite 412 | Vancouver, WA 98660  
360-567-1070 | [www.swwdc.org](http://www.swwdc.org)

### **Workforce Investment Council of Clackamas County**

WICCO is a non-profit organization dedicated to building a strong workforce through helping businesses and job seekers. Through private-public partnerships, the council attracts funding to make critical investments in workforce training and education.

Workforce Investment Council of Clackamas County  
365 Warner Milne Road | Suite 202 | Oregon City, OR 97045  
503-657-6644 | [www.wicco.org](http://www.wicco.org)

### **Worksystems, Inc.**

From programs targeting teens at risk of dropping out of school to filling the gap between employer needs and worker skills, Worksystems, Inc. provides workforce solutions that support individual prosperity and business competitiveness.

Worksystems, Inc.  
1618 SW First Avenue | Suite 450 | Portland, OR 97201  
503-478-7300 | [www.worksystems.org](http://www.worksystems.org)

SWWDC, WSI, and WICCO are equal opportunity employers and provider of employment and training services. Auxiliary aids and services are available upon request to persons with disabilities.

## Regional Health Care Workforce: Next Steps

This report, produced by the Columbia-Willamette Workforce Collaborative, is a tool for use by a broad audience of stakeholders, including health care employers, workforce agencies, education providers, economic development groups, youth service organizations and more. We hope that the contents of this report can help spark meaningful conversation and collaboration aimed at supporting the growth and success of the industry and its workers.

The following are potential next steps to help translate the report's findings into actionable items for health care industry stakeholders, including workforce development. These items are focused on system improvement, as opposed to program implementation, and will be adjusted through conversations with partners moving forward.

### A. Help Industry to Recruit, Train, and Retain Diverse Workers:

- Work with employers to establish and/or clarify internal career pathways for diverse and/or low-wage incumbent workers (see B below).
- Create and/or enhance mentorship programs for diverse incumbent health care workers.
- Fund health care-related career exposure, mentorships, and internships for diverse youth.
- Target diverse, unemployed health care workers for skill upgrades leading to employment along career pathways.

### B. Build and Update Key Career Pathways for New and Changing Occupations:

- Work with local training providers and hiring employers to build/refine skill profiles and training curricula for Non-Traditional Health Worker occupations, Medical Assistants, and other key roles that are due to shift and/or grow as the industry transforms.
- Align new and revised training programs with existing stackable credential programs to form clear career pathways into and out of target occupations.
- In partnership with employers, explore creative career pathways for re-employing MAs.
  - i. Create “tool kit”, including OJTs, to assist employers to develop trained and qualified staff during transitional period.
- Advise One-Stop staff, community colleges, and K-12 educators on the most current skills and competencies needed for new and shifting high demand health care roles.

### C. Address the Technology Skill Gap:

- Promote incorporation of technology skills in new and existing health care occupations to ease the transition to Electronic Health Records.

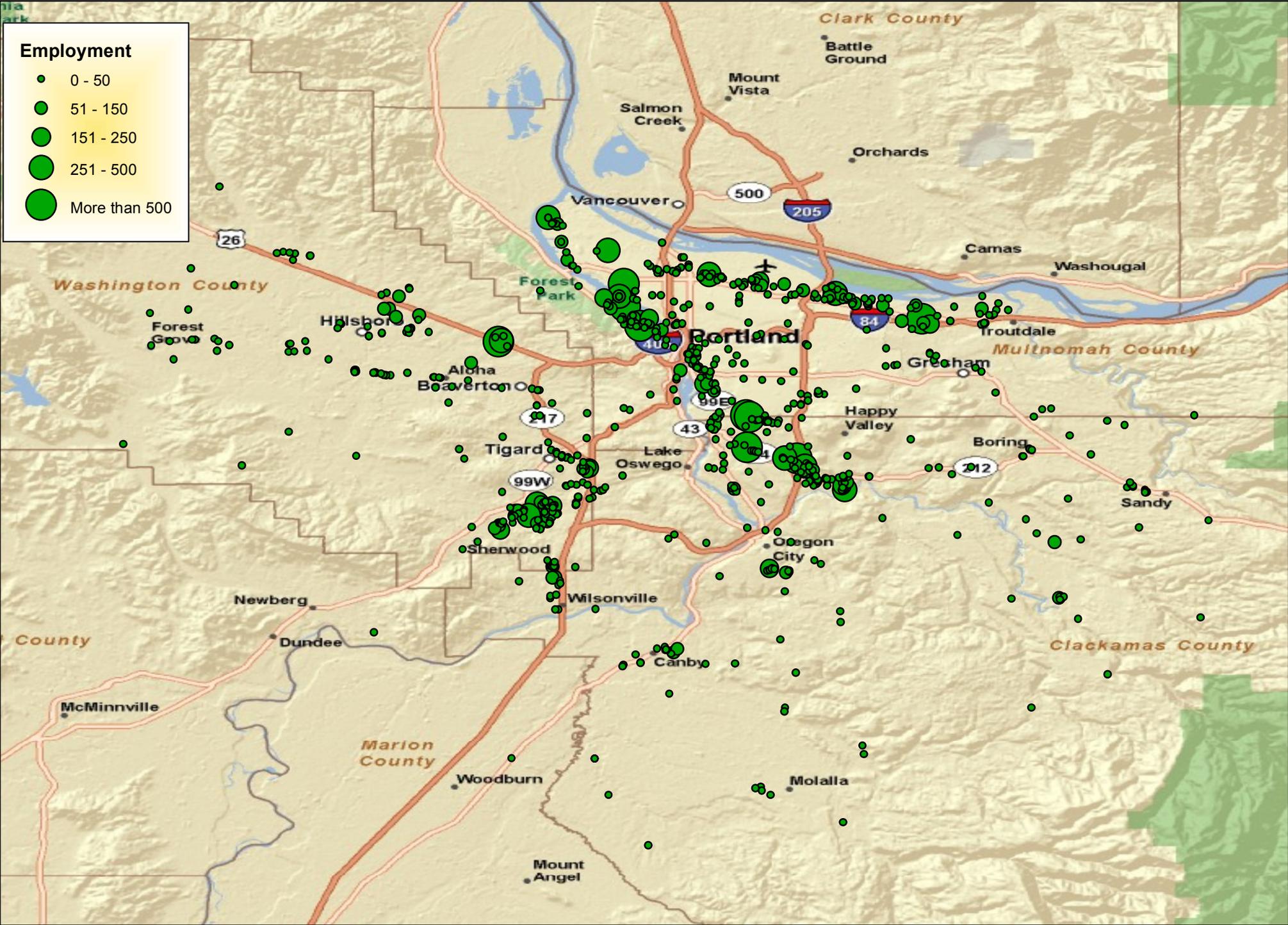
### D. Investigate Nursing Trends:

- Further investigate the aging nursing demographic and the impact of upcoming nursing retirements on the workforce over the next 10+ years.

### E. Focus on Tomorrow's Leadership:

- Expand customized leadership training opportunities (including the use of on-line and distance learning) for incumbent clinical workers, to enable them to move into leadership roles.
- Promote the development of employer-led mentorship and apprenticeship programs for new hires.

# Manufacturing(331,332,333,336) in Portland Metro, 2010





# Health Care

The health care cluster is a vital element of the Clackamas County economy, and this cluster has grown measurably over the past several years. Health care jobs tend to pay above average wages, and many of Clackamas County's largest employers are in this cluster. Representative companies include: American Medical Response NW; Legacy Meridian Park Hospital; Northwest Permanente; Providence Willamette Falls; Sunnyside Hospital; and Women's Health Center of Oregon. Significant levels of planned investments by private and non-profit health care providers in Clackamas County are underway.



## Economic Benefits to Clackamas County and the Region

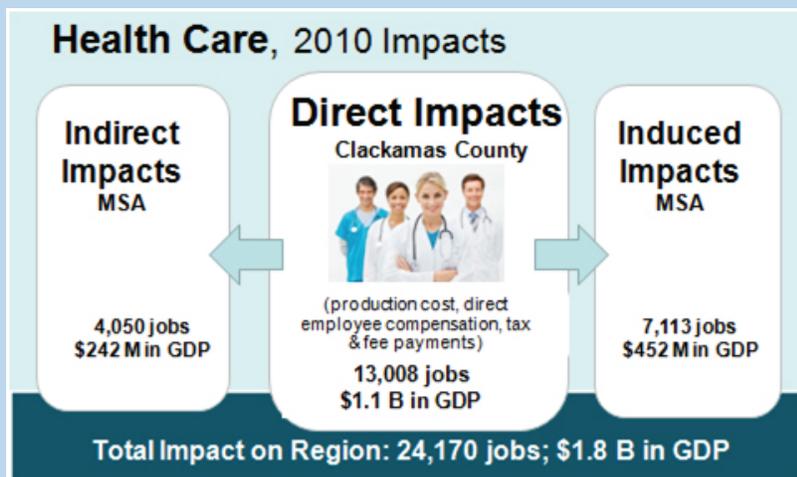
The health care cluster is a major economic engine in Clackamas County with an annual direct value added GDP that now exceeds \$1.1 billion. Today, over 710 companies within this cluster provide employment to over 13,000 workers in Clackamas County. This cluster also includes several of the county's largest employers, which support hundreds of small and medium size suppliers.

The health care cluster offers a wide range of entry level and advanced occupations with employment opportunities in rural and urban areas. Changing demographic patterns resulting from an aging "baby boom" population combined with a spike in birth rates as younger "Generation Y" households have children will result in increased demand for health care for many years. Direct economic benefit from production costs, employee compensation, and tax payments account for \$1.1 billion in value added GDP in Clackamas County, and leverages an additional \$700 million in secondary regional GDP from supply chain purchases and employee spending multipliers.

### Health Care Cluster Current Stats for Clackamas County

- Gross Domestic Product (GDP):** \$1.1 Billion
- Cluster Share of County GDP:** 7.1%
- Exports/Sales from Outside Region:** \*
- Direct Employment:** 13,008 jobs
- County Businesses:** 713
- Number of Businesses in Top 100:** 7
- 10-year Job Growth Forecast:** 31%
- Cluster Location Quotient (LQ)\*:** 1.19

*\*In 2010 there was a net outflow of health care demand from Clackamas County to the rest of the region. Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; with 10-year forecast by Oregon Employment Dept. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county region.*



**Health Care Cluster: Annual Economic Benefits**

	2006	2009	2010
Industry Location Quotient	1.1	1.12	<b>1.19</b>
Contribution to County GDP	8.0%	8.9%	<b>7.1%</b>
Business Establishments in County	599	225	<b>713</b>
Avg. Labor Income in County (per job)	\$62,000	\$69,000	<b>\$77,919</b>
Labor Income in County	\$708,406,000	\$858,903,000	<b>\$1,013,570,000</b>
<b>Employment</b>			
Direct Jobs in Clackamas County	11,379	12,470	<b>13,008</b>
Secondary Jobs	-	10,430	<b>11,163</b>
Total Direct & Secondary Employment	11,379	22,900	<b>24,171</b>
<b>Direct GDP and Output in Clackamas County</b>			
Direct GDP (Value Added)	\$1,008,502,000	\$1,109,926,000	<b>\$1,103,310,000</b>
% Traded Outside Region	n/a	n/a	<b>n/a</b>
Output	n/a	\$2,293,690,000	<b>\$1,765,600,000</b>
Direct Jobs in Clackamas County	11,379	12,470	<b>13,008</b>
Secondary Jobs	-	10,430	<b>11,163</b>
Total Direct & Secondary Employment	11,379	22,900	<b>24,171</b>

GDP = Gross Domestic Product.

Source: analysis by FCS GROUP. All data in this table, with exception of business establishments, are based on 2010 IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver region.



The future outlook for the health care cluster is very positive. Average compensation is well above the county-wide average for all jobs, and continues to trend upwards. Total GDP (valued added) and direct employment increased by 9% between 2006 and 2010. As Clackamas County and regional population increases and the amount of people over the age of 65 expands, the health care cluster should continue to experience above average growth and investment.

### Health Care Cluster North American Industrial Classification System (NAICS) Categories

**621 & 622:** Includes businesses which include offices of all health care specialists including physicians, dentists as well as all specialty doctors, hospitals, specialty care facilities.

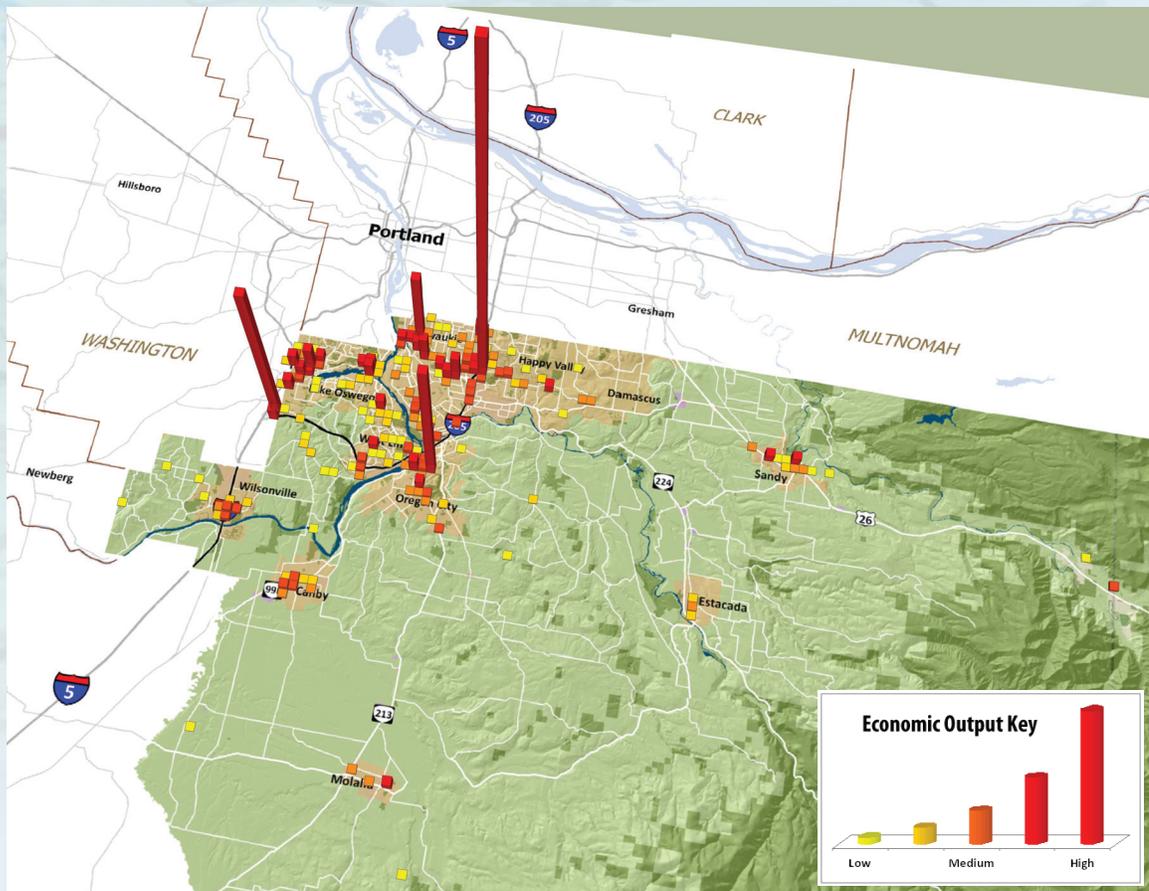
### Sample of Health Care Companies in Clackamas County

American Medical Response N.W. *
Eye Health Northwest PC
Kaiser Foundation Health Plan of NW
Legacy Meridian Park Hospital *
Northwest Permanente, P.C. *
Providence Milwaukie Hospital *
Providence Willamette Falls Hospital *
Rehab Specialists Inc. *
Sunnyside Hospital *
Woman's Health Center of Oregon PC *

Source: Oregon Employment Department.  
 \* Indicates top 100 County Business Listing



### Existing Health Care Companies in Clackamas County: Annual Regional Economic Output by Location\*



\*Reflects total economic output attributed to business activities measured in 2010, using the IMPLAN model for Clackamas County.

## Career Opportunities

Health Care is projected to add jobs in a wide variety of professions, ranging from patient care to technical research, to business management and administrative duties associated with running health care establishments. Representative career opportunities include:

- Registered Nurse
- Medical Secretary
- Physicians and Surgeons
- Medical Assistants
- Dental Hygienists
- Radiologic, CAT and MRI Technologists
- Medical and Health Services Managers



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### Resources

Clackamas County Business & Economic Development  
[www.clackamas.us/business](http://www.clackamas.us/business)

Business Oregon  
[www.oregon4biz.com](http://www.oregon4biz.com)

Workforce Investment Council of Clackamas County  
[www.wicco.org](http://www.wicco.org)

Clackamas Community College  
[www.clackamas.edu](http://www.clackamas.edu)

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### Contact Information

Clackamas County Business & Economic Development  
150 Beaver Creek Road  
Oregon City, Oregon 97045  
503-742-4329  
[www.clackamas.us/business](http://www.clackamas.us/business)



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Consultants:  
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Real Urban Geographics

# Advanced Manufacturing – Metals and Machinery



Oregon's largest metals employers, such as Consolidated Metco, Oregon Cutting Systems and Precision Castparts, have deep roots in Clackamas County. Oregon's metals industry is a vital part of the state's economy with over 1,700 businesses providing nearly 55,000 jobs. Metals manufacturing is a mature industry undergoing a transformation in the age of global competition. Early on, iron and metals production supported railroad and ship building. Iron and aluminum smelters once operated along the banks of the Columbia and Willamette rivers. Today, Oregon's metals industries produce a wide range of goods including computer components, jet engines, turbines for wind power generators, streetcars, rebar and multipurpose tools. Manufacturing companies, such as Oregon Iron Works, Blount (Oregon Cutting Systems)/Carlton Company, Benchmade Knife Company and Eagle Foundry are examples of major employers in Clackamas County that have primary operations in both urban and rural industrial areas, such as the Clackamas Industrial Area, Milwaukie Industrial Area, Wilsonville, Eagle Creek and Canby.



## Economic Benefits to Clackamas County and the Region

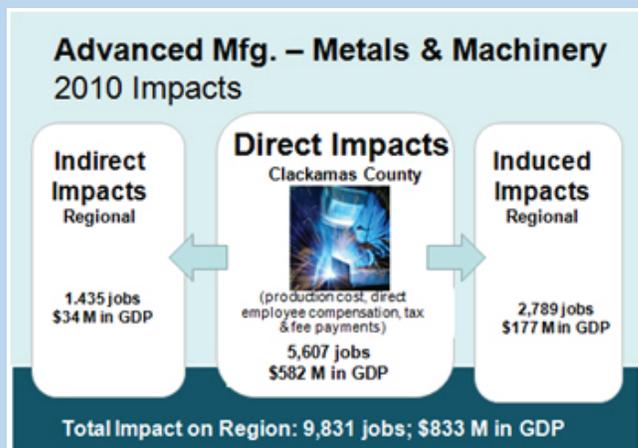
The advanced manufacturing – metals and machinery cluster has mature roots in Clackamas County, which once produced steel milled from iron ore along the banks of the Willamette River. Today, over 220 companies within this cluster provide employment to over 5,600 workers in Clackamas County. This cluster includes several of the county's largest employers, which support hundreds of small and medium size suppliers. As a top cluster, "exports" from the advanced manufacturing – metals and machinery cluster bring in nearly \$448 million in direct valued added GDP annually into Clackamas County from outside the nine-county Portland-Vancouver region.

Key advantages of this cluster include above average wage levels, with opportunities for a wide range of skill levels, from administration and sales/marketing to engineering managers and technicians. This cluster has a strong tendency to favor Clackamas County over other regional and national locations, and favors industrial settings in various Clackamas County urban and rural locations. As a direct economic benefit, production costs, employee compensation, and tax payments account for \$582 million in direct value added GDP in Clackamas County, and leverages an additional \$251 million in secondary regional GDP from supply chain purchases and employee spending multipliers.

**Advanced Manufacturing – Metals & Machinery**  
**Current Stats for Clackamas County**

- Gross Domestic Product (GDP): \$582 million
- Cluster Share of County GDP: 4%
- Exports/Sales from Outside Region: 77%
- Direct Employment: 5,607 jobs
- County Businesses: 223
- Number of Businesses in Top 100: 8
- 10-year Job Growth Forecast: 23%
- Cluster Location Quotient (LQ): 2.62

*Source: compiled by FCS GROUP based on data from IMPLAN (2010), adjusted to 2011 dollars; and Oregon Economic Development 10-year forecast. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county Region.*



CLACKAMAS COUNTY ECONOMIC LANDSCAPE

Advanced Manufacturing – Metals and Machinery

**Advanced Manufacturing – Metals and Machinery Cluster: Annual Economic Benefits**

	2006	2009	2010
Industry Location Quotient	1.92	1.85	<b>2.62</b>
Contribution to County GDP	3.0%	4.9%	<b>3.8%</b>
Business Establishments in County	212	225	<b>223</b>
Avg. Labor Income in County (per job)	\$65,000	\$66,000	<b>\$71,227</b>
Labor Income in County	\$487,517,000	\$448,980,000	<b>\$399,370,000</b>
<b>Employment</b>			
Direct Jobs in Clackamas County	7,773	6,820	<b>5,607</b>
Secondary Employment	7,690	4,304	<b>4,224</b>
Total Direct & Secondary Employment	15,463	11,124	<b>9,831</b>
<b>Direct GDP and Output in Clackamas County</b>			
Direct GDP (Value Added)	\$741,874,000	\$746,120,000	<b>\$581,800,000</b>
% Traded Outside Region	n/a	n/a	<b>77%</b>
Output	n/a	\$1,815,521,000	<b>\$1,316,820,000</b>

GDP = Gross Domestic Product.

Source: analysis by FCS GROUP. All data in this table, with exception of business establishments, are based on IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver region.

### Advanced Manufacturing – Metals and Machinery Strategic Market Opportunities

- Global demand for metals is increasing. This cluster added 13 business establishments between 2008 and 2010, and Oregon's exports of metals and machinery approached \$1.6 billion in 2010, up 38% from the preceding year.
- As surface roadways become more crowded, expect urban areas to reinvest in fixed route transit systems including commuter rail, light rail and street car trains. This bodes well for firms such as Oregon Iron Works – maker of the only streetcars produced in the U.S. –along with other companies and their supply chains.
- Innovations in chemical manufacturing are resulting in new higher-strength and super conductive metal materials for use in all types of products (e.g., cars, baseball bats, computer circuits and semi-conductors). Liquid metal alloy ion coatings will find new applications in the use of solar panels and photovoltaic applications for solar power generation products.
- Metals recycling is a focus of Clackamas County companies. As demand grows for metals, opportunities for value-added manufacturing using recycled content will increase.

#### Advanced Manufacturing: Metals and Machinery Cluster North American Industrial Classification System (NAICS) Categories

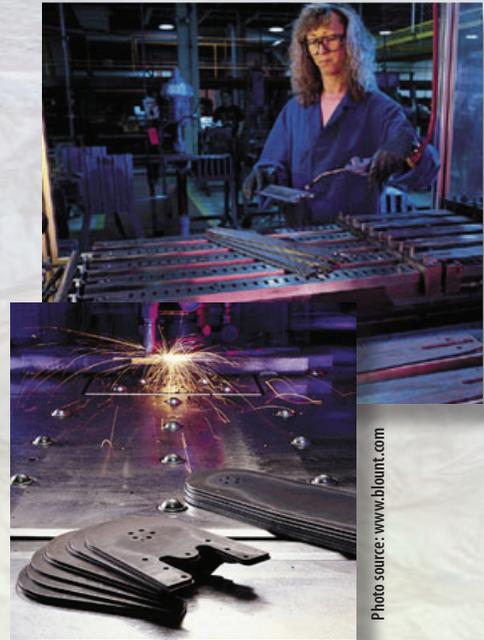
**331: Primary Metal Manufacturing.** This sector includes the smelting or refinement of ferrous and non ferrous metals. Establishments in this sector also manufacture metal alloys used in rolling and extruding operations to make sheet, strip, bar, rod, or wire for castings and other basic metal products.

**332: Fabricated metal Product Manufacturing.** Industries in this sector transform metal into intermediate or end products, excluding machinery, computers, electronics, metal furniture and related products. Fabricated metal processes include forging, stamping, bending forming, machining, welding and assembling. Examples include metal pipe manufacturing.

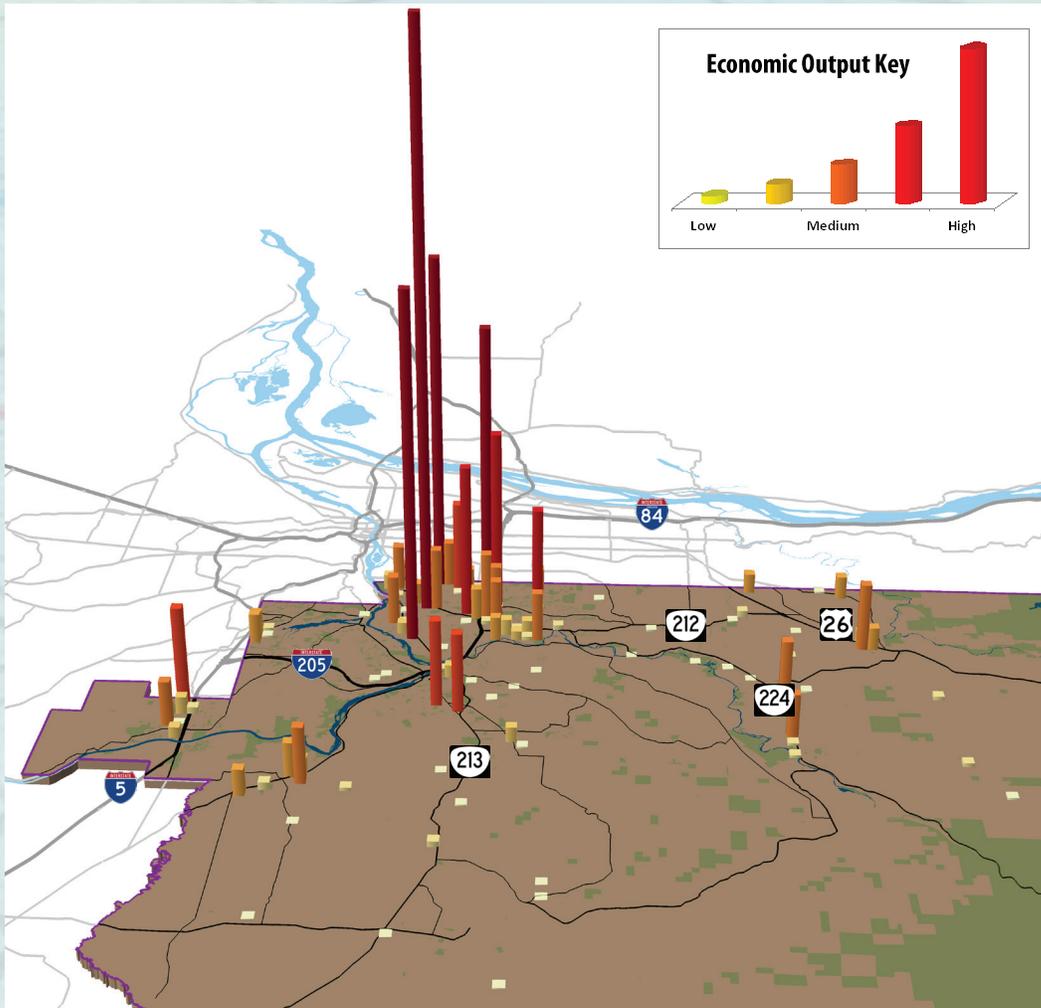
**333: Machinery Manufacturing.** Industries in this sector transform metal into machinery or tools used for the manufacture of goods.

Sample of Metals & Machinery Manufacturing Companies in Clackamas County
PCC Structurals *
Oregon Cutting Systems *
Oregon Iron Works *
Cleanpak International *
Benchmade Knife Company *
Wriglesworth and Willock Metal *
The Stanley Works *
Sandvik Medical Solutions
SSI Shredding Systems *
Eagle Foundry Company

Source: Oregon Employment Department.  
 \*indicates Top 100 County Business listing



**Existing Advanced Manufacturing – Metals and Machinery Businesses in Clackamas County: Annual Regional Economic Output by Location\***



\* Reflects total economic output attributed to business activities measured in 2010 using the IMPLAN model for Clackamas County.

## Career Opportunities

The Oregon Employment Department forecasts new job openings for occupations in the metals and machinery cluster for expected expansion as well as the replacement of existing positions due to retiring workers. The leading job occupations in this cluster include:

- Sales representatives
- Mechanical engineers
- Welders
- Laborers and stock workers
- General managers and operations managers
- Shipping and logistics
- Inspectors/testers
- Assemblers
- Bookkeeping and accounting



### Resources

Clackamas County Business & Economic Development  
[www.clackamas.us/business](http://www.clackamas.us/business)

Business Oregon  
[www.oregon4biz.com](http://www.oregon4biz.com)

Workforce Investment Council of Clackamas County  
[www.wicco.org](http://www.wicco.org)

Manufacturing 21 Coalition  
[www.manufacturing21.com](http://www.manufacturing21.com)

Oregon Precision Metal Fabricators Association  
[www.opmfa.org](http://www.opmfa.org)

Clackamas Community College  
[www.clackamas.edu](http://www.clackamas.edu)

Oregon Institute of Technology  
[www.oit.edu/portland](http://www.oit.edu/portland)

Marylhurst College  
[www.marylhurst.edu](http://www.marylhurst.edu)

Oregon Manufacturing Extension Partnership  
[www.omep.org](http://www.omep.org)

The Voice of Oregon Manufacturing  
[www.oregonmanufacturing.org](http://www.oregonmanufacturing.org)

### Contact Information

Clackamas County Business & Economic Development  
 150 Beaver Creek Road  
 Oregon City, Oregon 97045  
 503-742-4329  
[www.clackamas.us/business](http://www.clackamas.us/business)



Consultants:  
 FCS GROUP  
 Real Urban Geographics

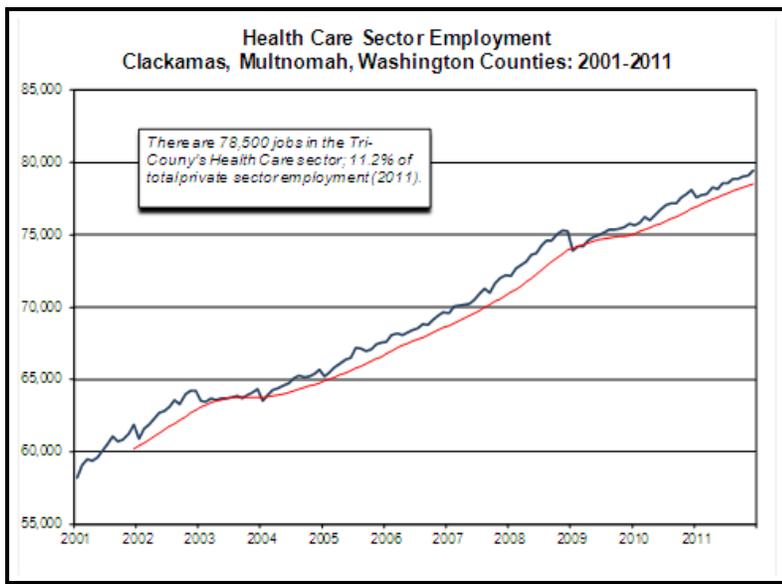
## Health Care Sector: Industry Report

### Tri-County Region (Clackamas, Multnomah, Washington Counties)

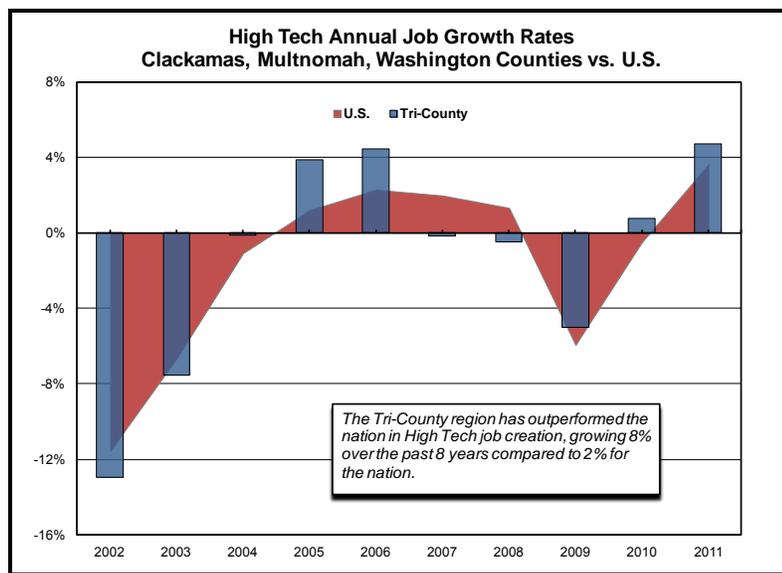
Definition: The Health Care sector includes hospitals, offices of physicians and other health care providers, and nursing and residential care facilities.\*

Size: With 3,612 firms, 78,500 jobs and a payroll of \$4.1 billion (2011), the Health Care sector accounts for 11% of the Tri-County's private-sector employment and 12% of payroll.

#### Employment Trends:



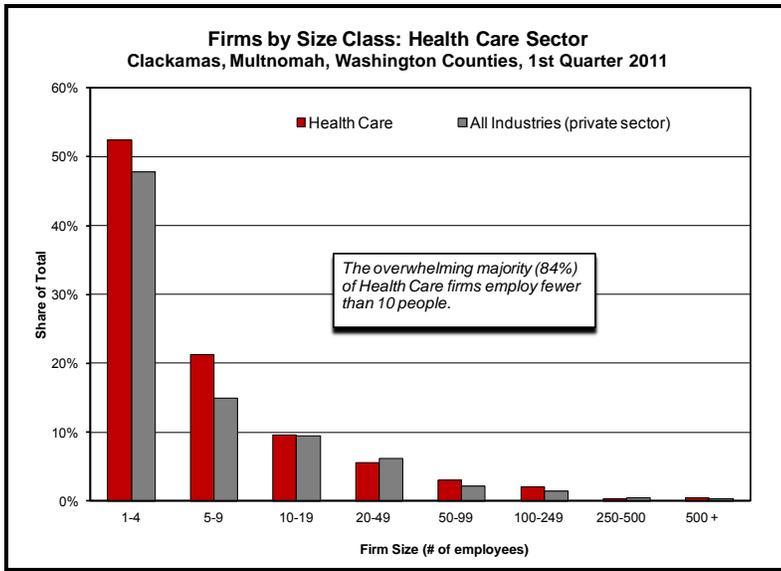
*The Tri-County's Health Care sector added 18,300 jobs between 2001 and 2011 for a growth rate of 30.5%.*



*Growth in the Tri-County's Health Care sector has typically outperformed national growth.*

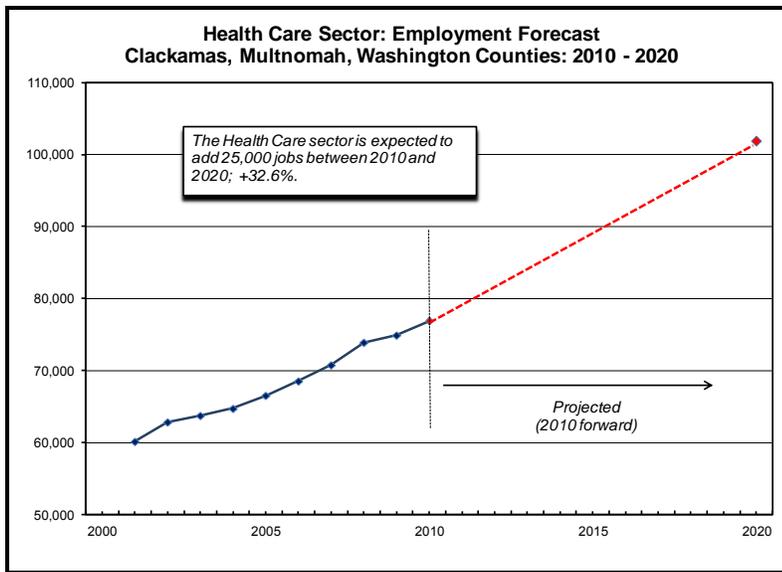
\*North American Industry Codes (NAICS) 621, 622, 623

**Firm Data:**



- The typical Health Care firm is larger than the average for all industries (21.5 vs. 14.5 employees).
- Four out of every five Tri-County Health Care companies have fewer than 10 employees.
- Nine out of every ten Tri-County Health Care employees work at a company with more than 10 employees.

**Outlook:** Job growth in Health Care is projected to outpace the overall economy.



The Health Care sector is expected to add 25,000 jobs between 2010 and 2020 for a growth rate of 32.6%. In comparison, the region's private sector is expected to grow by 22.6%.

**Concentration:** The Tri-County's Health Care sector has a location quotient of 0.9, indicating that this industry is slightly less concentrated here relative to the industry structure of the United States.

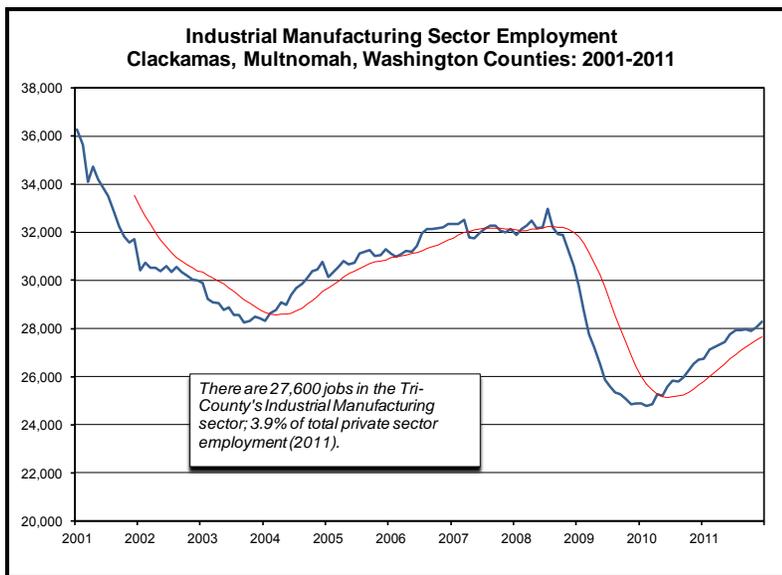
Contact Amy Vander Vliet, Oregon Employment Department. [Amy.S.VanderVliet@state.or.us](mailto:Amy.S.VanderVliet@state.or.us) (503) 280-6031

## Industrial Manufacturing Sector: Industry Report Tri-County Region (Clackamas, Multnomah, Washington Counties)

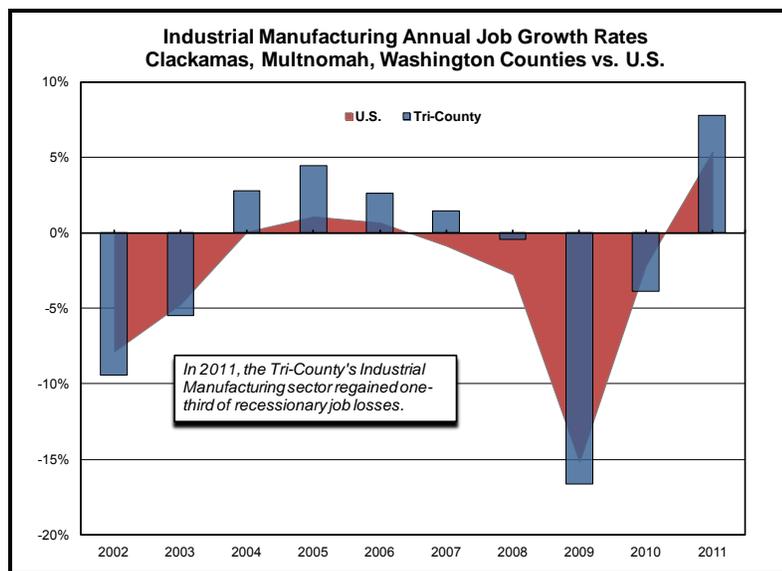
**Definition:** The Industrial Manufacturing sector includes metals, machinery, and transportation equipment manufacturing.\*

**Size:** With 727 firms, 27,600 jobs, and a payroll of \$1.7 billion (2011), the Industrial Manufacturing sector accounts for 4% of the Tri-County's private-sector employment and 5% of payroll.

### Employment Trends:



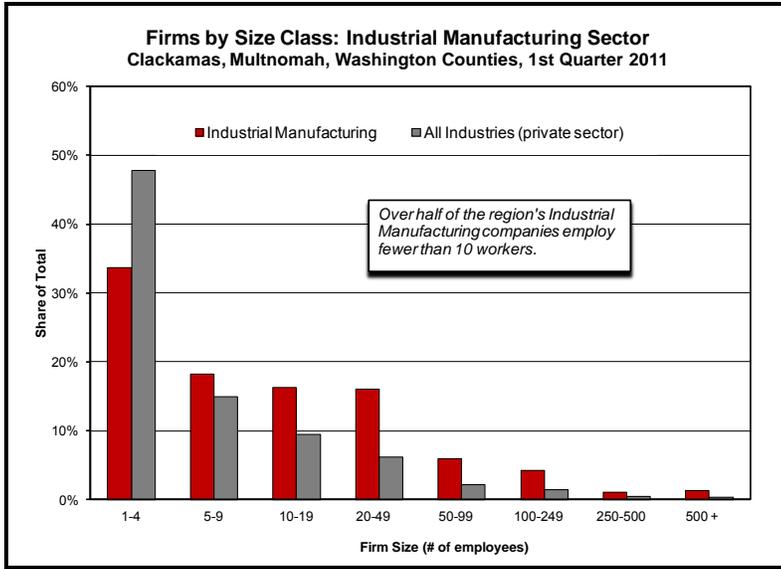
- The Tri-County's Industrial Manufacturing sector added 3,400 jobs in the years following the 2001-2003 recession (+11.8% vs. 10.3% for the overall economy).
- It lost 6,000 jobs during the recession of 2007-2009, and has regained 2,000 since.



*The Tri-County's Industrial Manufacturing sector follows national trends, although to greater extremes. It experiences sharper declines during downturns and grows more rapidly in times of expansion.*

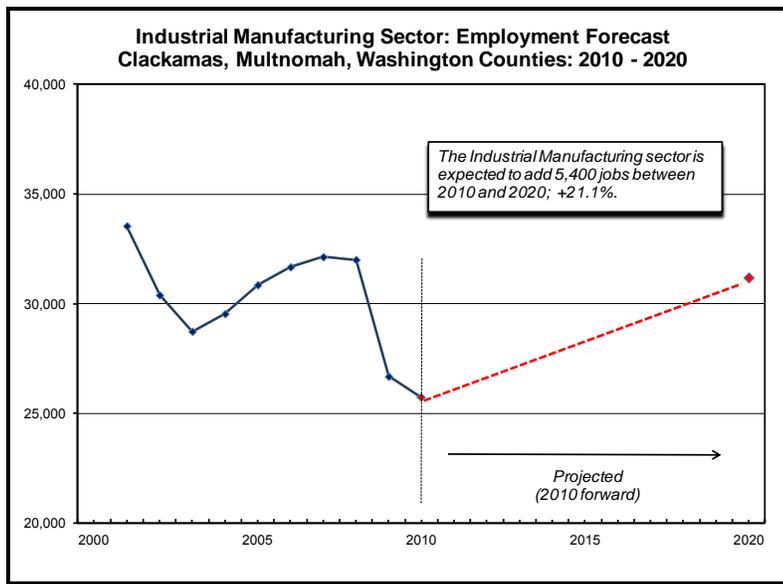
\*North American Industry Codes (NAICS) 331, 332, 333, 336

Firm Data:



- *Industrial Manufacturing companies are twice as large as the typical Tri-County company: 38 employees per firm, on average, vs. 19 overall.*
- *Nearly two-thirds of Tri-County Industrial Manufacturing employees work at a company with more than 100 employees.*

Outlook: The pace of job growth in Industrial Manufacturing will match the overall economy.



*The Industrial Manufacturing sector is forecasted to add 5,400 jobs between 2010 and 2020 for a growth rate of 21.1%.*

*All components of Industrial Manufacturing are expected to add jobs, led by fabricated metals (+1,900 new jobs).*

Output:

The entire manufacturing sector (including Advanced Manufacturing) contributed \$32.6 billion to the greater Portland metro area's Gross Domestic Product (2010), representing 29 percent of total GDP. In comparison, manufacturing accounts for just 11 percent of Portland's employment.

Concentration: The Tri-County's Industrial Manufacturing sector has a location quotient of 1.1 (relative to the U.S.), indicating that this industry has about the same proportion of employment in this sector as the nation.

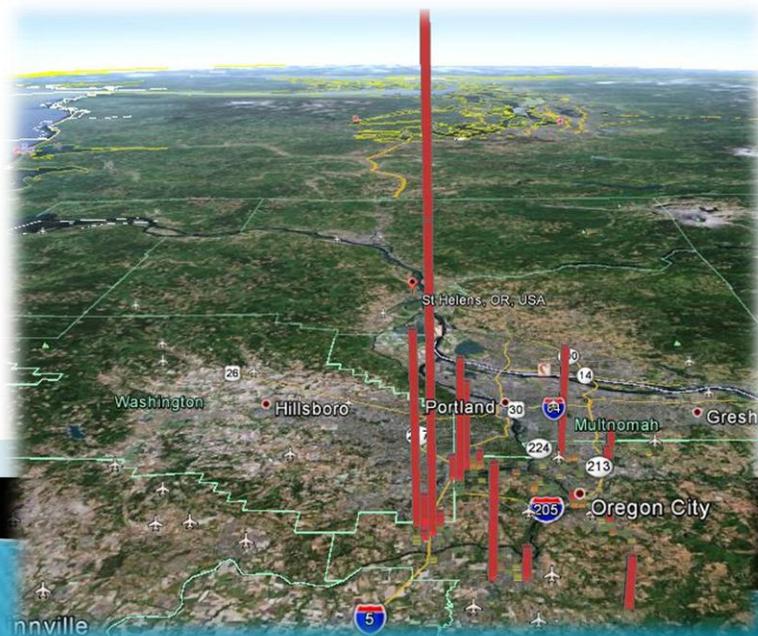
**Contact Amy Vander Vliet**, Oregon Employment Department. [Amy.S.VanderVliet@state.or.us](mailto:Amy.S.VanderVliet@state.or.us) (503) 280-6031



# CLACKAMAS COUNTY ECONOMIC LANDSCAPE: Emerging Trends and Strategies

June 22, 2012

Prepared by



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## Section I: Introduction and Background

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Clackamas County Business and Community Services continues to focus on efforts to broaden the county's knowledge and understanding of the "economic landscape" of the county, specifically within the context of the greater Portland regional economy.

Keeping abreast of current emerging trends enables the county to proactively develop public policies and strategies that enhance economic development potential and create local opportunities that have a beneficial "ripple effect" throughout the region. This report assists the county in achieving its economic goals, which include:

- *Increasing the jobs-to-housing ratio*
- *Increasing the average wages earned within the county*
- *Ensuring that we are efficiently using our land and infrastructure for the highest and best value, and that it balances economic opportunity with quality of life measures*
- *Encouraging the region to gain a similar understanding across jurisdictions that will enable us to market and promote the region in a coordinated and cohesive manner; thereby optimizing all regional opportunities.*

Clackamas County commissioned FCS GROUP (with assistance from Real Urban Geographics) to update prior economic landscape analysis using emerging trends that take into account the impact of the recent national economic recession. Specifically, the FCS GROUP scope of work is "to convey the current economic forces that are driving the Clackamas County local economy..." through several tasks as follows:

- ◆ Task 1: Analyze Emerging Trends
- ◆ Task 2: Prepare Graphics
- ◆ Task 3: Document Findings

## BACKGROUND

The prior Clackamas County Economic Landscape analysis provided a deeper understanding of the global context in which Clackamas County and the greater Portland region “competes” for business investment. Prior work was managed by FCS GROUP with strategic input from Michael Gallis and Associates, a renowned international econometric and planning firm. That effort concluded that Clackamas County functions as an integral part of the greater Portland region; and the long-term success of the region is dependent upon our ability to optimize land, infrastructure, and human capital collaboratively. On the local level, county, city and business investment and policy decisions interact to create new opportunities for economic development activity.

The findings contained in the prior 2010 Clackamas County Economic Landscape analysis utilized estimates for employment and other measures of economic activity using 2006 and 2007 data. The prior Economic Landscape study formulated an innovative methodology and approach for analyzing and understanding local and regional economies, using measures of economic “value added” and “output” that go beyond direct payroll and employment activity. Innovative methods were also used to “map” the economic contribution of key industry clusters, and to quantify measures of economic activity per acre of land area within select employment centers.

Because the impact of the recent national economic recession were not documented in the prior Economic Landscape study, it is important to revisit those findings—using a similar “data mining” approach that documents emerging trends and key clusters that are expected to drive the county’s economy over the next decade.<sup>1</sup>

This report relies primarily upon data derived from the IMPLAN (Impact Analysis Model for Planning) to convey local county and regional trends. Since the results of the IMPLAN model is based on a methodology that is different from that used by the Oregon Employment Department for estimating employment and calculating earnings, direct comparisons between IMPLAN and Oregon Employment Department data sets is not recommended.

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<sup>1</sup> According to the National Bureau of Economic Research, the most recent U.S. recession lasted 19 months (December 2007 to June 2009); the longest recession on record since the beginning of the “Great Depression” which started in August 1929.

## Section II. Emerging Trends

---

This section summarizes the results from the emerging trends analysis. The work undertaken by FCS GROUP to complete the analysis included:

- ◆ Compiling and reviewing relevant available background materials, reports, studies, data, land use plans, and related information
- ◆ Evaluating direct, indirect and induced economic activity within the Clackamas County and greater Portland regional economy, using the IMPLAN model. Please refer to [www.implan.com](http://www.implan.com) and the Glossary provided in this report for an explanation of terms and definitions utilized by the IMPLAN model.
- ◆ Summarizing results and identifying trends in business formations, employment, and investment activity.

The results included in this document are intended to help inform the Clackamas County and interested local and regional stakeholders about the opportunities within key clusters or business types. The findings could also serve as a potential basis for allocating local funding to assist with constructing projects or managing activities that help influence strategic private investment.

### II.A. GLOBAL, NATIONAL AND REGIONAL TRENDS

The Portland MSA is the largest regional economy between San Francisco and Seattle and ranks 5th in the Western United States in terms of regional population. The Portland MSA contains over 2.2 million residents, has a civilian labor force of 1.2 million, and generates an annual GDP in excess of \$117 billion.

The U.S. and Oregon economy are currently recovering from an 18-month economic recession that began in December 2007 and officially ended in June 2008, according to the National Bureau of Economic Research. The recent “Great Recession” is the longest on record since 1939 and has resulted in an economic slowdown across the U.S.

As of 2012, moderate economic expansion is occurring nationally and in Oregon. According to the U.S. Bureau of Economic Analysis, real Gross Domestic Product (GDP is the measure of the value of all goods and services produced annually) increased in 2011 at an annual rate of 1.7%; and increased at an annual rate of 3.0% in 2010.

**Clackamas County Economic Landscape Update**

The future GDP outlook is more promising. According to January 2012 projections by the Federal Reserve Bank, national GDP is expected to grow by over 2.2% in 2012, and by over 2.8% in 2013 and 2014. A comparison of GDP and Consumer Price Index (CPI) trends and a 2013 forecast for global developing and developed countries is provided in **Figure 1**.

Oregon's economic growth is tempered by relatively high unemployment rates and home foreclosures that continue to rise. Oregon posted a year-over-year overall job gain of 17,800 between December 2010 and December 2011. At the same time, the state's seasonally adjusted unemployment rate fell from 10.6% in December 2010 to 9.0% in December 2011 (compared to 8.5% for the U.S.). Overall unemployment rates in Clackamas County were slightly higher than the state average with 8.1% unemployment in December 2011, which was more favorable than 11.8% recorded one year prior. It should be noted that Oregon is also experiencing a high level of "under-employment" which is not reflected in these data trends. Fortunately, it appears that the Oregon and the Portland MSA economies are now undergoing a slow economic recovery.

**Table 1, GDP and CPI Comparisons, Year-over-Year Change**

	GDP			CPI		
	2011	2012	2013	2011	2012	2013
Global (PPP weights)	3.5%	3.2%	3.7%	5.4%	4.2%	4.1%
Global (Market Exchange Rates)	2.4%	2.0%	2.5%	n/a	n/a	n/a
Advanced Economies <sup>1</sup>	1.5%	1.5%	2.1%	2.9%	1.7%	1.5%
United States	1.7%	2.0%	1.9%	3.2%	2.0%	2.0%
Eurozone	1.5%	-0.1%	1.8%	2.7%	1.7%	1.2%
United Kingdom	0.9%	0.8%	1.7%	4.5%	2.1%	1.6%
Japan	-0.2%	2.0%	1.5%	-0.2%	-0.1%	0.1%
Korea	3.6%	3.7%	3.7%	4.0%	3.4%	3.1%
Canada	2.3%	2.3%	3.0%	2.9%	2.2%	2.1%
Developing Economies <sup>1</sup>	5.9%	5.3%	5.7%	8.3%	7.0%	7.1%
China	9.2%	8.2%	8.6%	5.5%	3.6%	3.7%
India	7.3%	7.1%	7.7%	9.0%	7.7%	7.9%
Mexico	4.1%	4.3%	4.5%	3.3%	4.9%	5.3%
Brazil	3.0%	3.3%	4.0%	6.6%	5.5%	5.2%
Russia	4.1%	3.2%	3.0%	8.6%	6.7%	6.6%

Forecast as of: December 7, 2011

<sup>1</sup>Aggregated Using PPP Weights

Source: Wells Fargo Bank.

In Oregon, state economists are predicting a continued upturn in the short term, although the Oregon Office of Economic Analysis calls it "a relatively 'jobless' recovery" with employment growing slowly at about 2.0 percent in 2012. The Oregon economy should experience more rapid growth than the nation as a whole, but this is not expected to generate a corresponding rise in per capita personal income before 2017, since any income gains will be largely offset by increases in the state population.

**Trade Overview**

The Portland MSA is one of four primary international trade gateways along the West Coast. Rapidly growing Asian and Middle Eastern economies will result in significant increases in

demand for trade into and out of most international and regional ports, including the Port of Portland. Commodity flow forecasts for the region project a doubling of freight volume over the next 20 years. This growth equates to an average annual growth rate of 2–3%, which is faster than the regional population growth rate.

As global and state GDP rises and commodity trade increases, Oregon ports could benefit from increases in imports and export activity. Oregon exports reached a record high of \$17.67 billion in 2010 (according to the most recent data by the U.S. Dept. of Commerce) up 18.5% from 2009. Oregon's leading trade partner is China, which now imports about 23% of Oregon exports. Other leading export destinations in decreasing order include Malaysia, Canada, Japan, South Korea, and Taiwan.

**Figure 7 Portland–  
Beaverton–Salem–  
Vancouver MSA Region**



Increasing exports is another positive recent economic trend that is benefiting local goods producers. A falling dollar and improving market in Asian counties spurred growth in Oregon. Oregon exports increased to \$18.3 billion in 2011 compared with \$17.7 billion in 2010. Categories that evidenced notable improvements included: high tech; metals; agriculture and food production, processed foods, and wood materials (see **Figure 5**).

## Clackamas County Economic Landscape Update

Figure 5 Top 25 Oregon Exports, Sorted by 2011 Export Value (billions)

Rank	Description	2011 Value	% Change, 2008 - 2011	Clackamas Key Cluster Name
---	<b>Total OREGON Exports and % Share of U.S. Total</b>	<b>\$ 18,292</b>	<b>-5%</b>	
---	<b>Total, Top 25 Commodities and % Share of State Total</b>	<b>\$ 11,468</b>	<b>4%</b>	
1	PROCESSORS AND CONTROLLERS, ELECTRONIC INTEGRATED CIRCUITS	\$ 4,125	-16%	High Tech
2	CEREALS, WHEAT AND MESLIN	\$ 1,962	-5%	Food & Bev. Proc.
3	POTASSIUM CHLORIDE	\$ 1,064	34%	Ag. & Food Prod.
4	CIVILIAN AIRCRAFT, ENGINES, AND PARTS	\$ 446	9%	Metals & Mach. Mfg.
5	DIGITAL PROCESSING UNITS	\$ 415	20%	High Tech
6	FERROUS WASTE & SCRAP	\$ 358	10%	Metals & Mach. Mfg.
7	MACHINES FOR THE MANUFACTURE OF SEMICONDUCTORS OR ELECTRONIC CIRCUITS	\$ 302	100%	High Tech
8	PHOTOSENSITIVE SEMICONDUCTOR DEVICES INCLUDING PHOTOVOLTAIC CELLS	\$ 280	<b>See Note</b>	High Tech
9	ELECTRONIC INTEGRATED CIRCUITS	\$ 268	14%	High Tech
10	ROAD TRACTORS FOR SEMI-TRAILERS	\$ 217	-49%	
11	CHEM ELEMENTS DOPED FOR USE IN ELECTRONICS	\$ 205	18%	High Tech
12	SOYBEANS, WHETHER OR NOT BROKEN	\$ 183	<b>See Note</b>	Ag. & Food Prod.
13	FORAGE PRODUCTS (HAY, CLOVER, VETCHES, ETC)	\$ 175	45%	Ag. & Food Prod.
14	X-RAY FILM IN ROLLS, SENSITIZED, UNEXPOSED, NO PAPER	\$ 171	<b>See Note</b>	
15	CONIFEROUS WOOD SAWN, SLICED, OVER 6 MM THICK	\$ 161	50%	Wood Product Mfg.
16	CONIFEROUS WOOD IN THE ROUGH, NOT TREATED	\$ 143	<b>See Note</b>	Wood Product Mfg.
17	FOOTWEAR PARTS, HEEL CUSHION, GAITERS ETC	\$ 138	41%	
18	COPPER WASTE AND SCRAP	\$ 125	56%	
19	KRAFTLINER, UNCOATED UNBLEACHED IN ROLLS OR SHEETS	\$ 113	-7%	Metals & Mach. Mfg.
20	X-RAY PLATES & FLAT FILM, SENSITIZED, UNEXPOSED	\$ 112	65%	
21	TRUCK, DIESEL ENGINE, GROSS VEHICLE WEIGHT GREATER THAN 20 METRIC TONS	\$ 105	-15%	
22	WOOD IN CHIPS OR PARTICLES, CONIFEROUS	\$ 103	-6%	Wood Product Mfg.
23	NEWSPRINT, IN ROLLS OR SHEETS	\$ 101	31%	Film & Media
24	PARTS AND ATTACHMENTS FOR DERRICKS	\$ 98	0%	Metals & Mach. Mfg.
25	CORN (MAIZE), OTHER THAN SEED CORN	\$ 96	-24%	Ag. & Food Prod.

Source: U.S. Census.

<http://www.census.gov/foreign-trade/statistics/state/data/or.html>**Notes:***Due to negligible exports in base year the % change may be incongruent with long-term trends at this time*

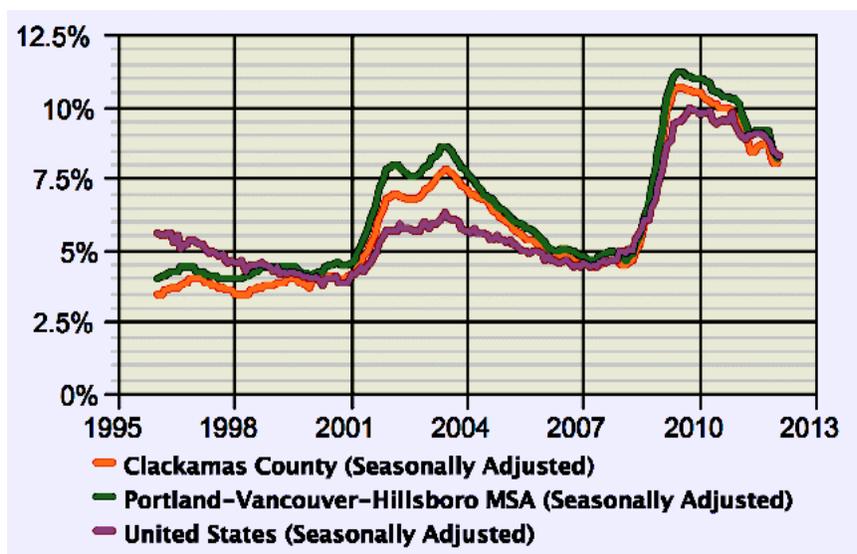
## Clackamas County Economic Landscape Update

### Employment and Unemployment

The greater Portland regional economy has struggled along with much of the nation to shake off the effects of the national and global economic slowdown. After nearly two decades of annual growth, Portland regional economy experienced negative employment growth between December 2007 and January 2010.

Unemployment rates within the nation, region and Clackamas County have shown some improvement over the past year compared to the recent peak in 2009. As indicated in **Figure 3**, the unemployment rate in Clackamas County was 7.7% as of May 2012, down from 8.8% 12 months earlier (May 2011). Measures of unemployment reflect the percentage of the workforce that is actively seeking work over the past 12 months, and does not indicate the total level of under-employment (includes those that have given up looking for work or settled for lower-income positions), which many economists think is almost double these levels.

**Figure 3 Unemployment Rate Trends, 2005–2012**



Source: Oregon Employment Department, March 2012

Between January 2010 and January 2011 employment in the Portland-Vancouver-Hillsboro MSA region grew by approximately 0.9 percent. Over the past year, the sectors within the MSA that have added jobs the fastest included:

- Construction (+5,300)
- Leisure and Hospitality (+4,400)
- Wholesale Trade (+2,300)
- Retail trade (+2,000)
- Durable goods manufacturing (+1,600)
- Educational services (non-government) (+1,400)

**Clackamas County Economic Landscape Update**

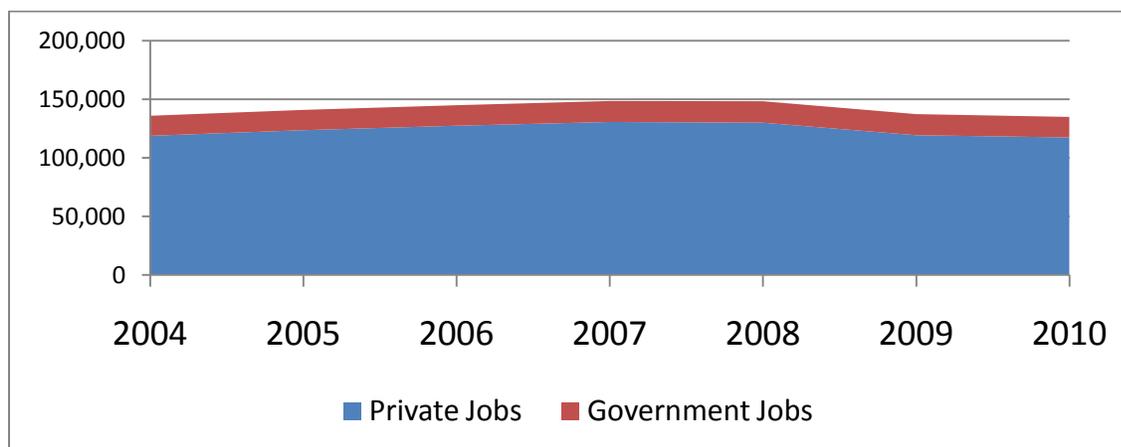
- Health care and social assistance (+1,300)
- Arts, entertainment & recreation (+1,200)
- Professional and business services (+200)
- Software publishers (+200)
- Truck transportation (+100)
- Nondurable goods manufacturing ( no change)

The sectors within the MSA showing the largest declines in employment over the past year include:

- Local government (-1,600)
- Administrative and support services (-1,200)
- Information (-600)
- Federal government (-400)
- Financial activities (-400)
- Misc. services (-400)
- Management of companies and enterprises (-300)
- Membership associations and organizations (-1,100)
- State government (-200)

Total “covered employment” in Clackamas County included 134,900 jobs in 2010; well below the 2007 peak of 148,500 jobs and on par with the level of employment recorded back in 2003 (sees **Figure 2**).

**Figure 2 Non-farm employment in Clackamas County: now on par with 2003 levels**



*Source: Oregon Employment Department, seasonally adjusted covered employment.*

## Population and Earnings

Population levels continue to increase in both Oregon and Clackamas County due to population migration patterns, increases in immigrant population levels, and natural population increases. Population in Clackamas County increased by 41,775 residents over the past decade—to 497,926 people. As indicated in **Figure 6**, the average annual growth rate (AAGR) for population growth in Clackamas County has exceeded that of the tri-county Metro region (includes Clackamas, Multnomah and Washington Counties), the state of Oregon, and the nation.

### Figure 6 Population Trends and Projections

Clackamas County outpaces regional, state and national population growth

	2000	2011	Proj. 2025	Annual Avg. Growth Rate	
				2000-2011	2011-2025
Clackamas County	338,391	378,480	497,926	1.0%	2.0%
Tri-County Region*	1,451,650	1,656,775	1,999,623	1.2%	1.4%
Oregon	3,421,399	3,857,625	4,626,015	1.1%	1.3%
USA	281,421,906	311,390,000	357,452,000	0.9%	1.0%

*Source: US Census; regional and county forecast by Oregon Office of Economic Analysis; FCS GROUP. \*Tri-county region includes Clackamas, Multnomah and Washington counties.*

An analysis of employee compensation reveals that average income levels for workers in Clackamas County are about 18% below the MSA average (source: 2010 IMPLAN model for Clackamas County and 9-county MSA). This large “wage gap” indicates that there is a relatively high share of low-pay service and retail jobs within Clackamas County. Many of these jobs are likely temporary or part-time jobs without benefits, such as health care and profit sharing. A similar conclusion may be drawn using Oregon Employment Department business payroll data, which measures payroll rather than the broader IMPLAN employee earnings estimates (payroll and benefits).

## II.B. EMPLOYMENT GROWTH FORECAST

Over the long-term, Metro anticipates that the region will continue to add people and attract jobs. Metro expects the nine-county Portland-Beaverton-Hillsboro-Vancouver PMSA to add nearly one million new residents by year 2050.<sup>2</sup> Within the larger PMSA, the tri-county Metro region (consisting of Clackamas, Multnomah and Washington counties) is expected to add nearly 336,000 new households and 629,000 new jobs over the 2005-2035 timeframe.

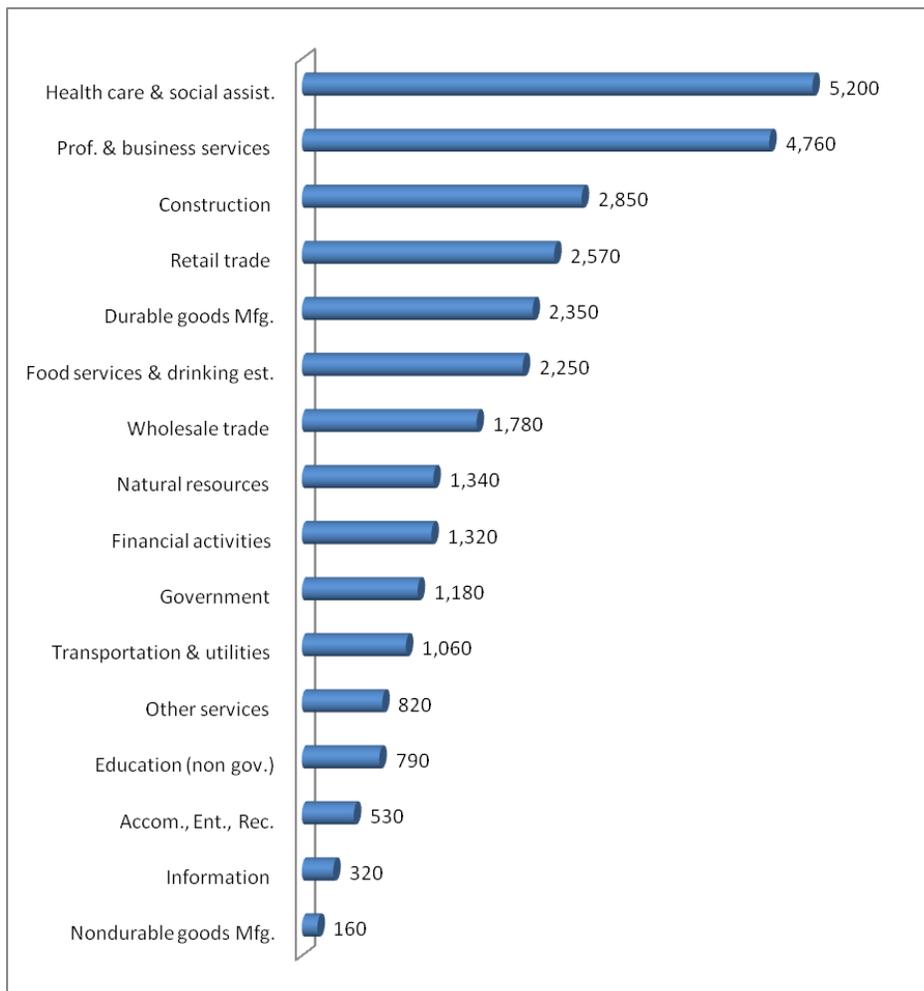
The long-term Metro growth forecast generally indicates that Clackamas County will continue to maintain a relatively low employment-to-housing ratio in comparison to the tri-county region. This finding is likely attributed to the current established regional commuter patterns, with Portland serving as the regional city center, with relatively large employment centers located in and around Airport Way (Multnomah County) and the Sunset Corridor (Washington County).

As the existing urban employment centers within Clackamas County approach build-out (such as Kruse Way, Clackamas Industrial Area, North Milwaukie Industrial Area, and the East Wilsonville Industrial Area), the county will be hard pressed to significantly enhance the ratio of jobs to housing. In fact, unless new employment areas are established in locations such as the Rock Creek Employment Center (Happy Valley) and in and around Oregon City (such as the Beavercreek area) the employment to household ratio could fall below 1.0 in Clackamas County.

While long-term population and employment forecast for growth appear to be very positive for Oregon and the greater Portland region, the short-term forecast is less certain. The 10-year Clackamas County employment growth projections prepared by the Oregon Employment Department (2010 to 2020) anticipate Clackamas County employment will increase from 139,140 to 168,270, or by approximately 29,130 new jobs. Nearly two-thirds of Clackamas County's job growth is expected to occur in three sectors: health care & social services; professional & business services; and leisure & hospitality (includes hotels, motels and restaurants), as indicated in **Figure 9**.

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<sup>2</sup> The Portland-Vancouver-Hillsboro MSA consists of nine counties in OR and WA, including: Clackamas, Multnomah, Washington, Columbia, Yamhill, Marion, Polk, Clark and Skamania.

**Figure 9 Clackamas County 10-Year Job Growth Forecast (2008–2018)**

Source: Oregon Employment Department.

## II.C Business Formation Trends

To better understand the nature of business size characteristics, FCS GROUP compiled Dun & Bradstreet data using results available through [www.youreconomy.org](http://www.youreconomy.org). FCS GROUP compared the greater Portland region (PMSA) with other regions around the nation in terms of size of existing establishments (public, private and non-profits) for year 2008. The results shown in **Figure 10** indicate that the greater Portland region has a relatively higher concentration of self-employed and small establishments (less than 9 employees) and lower concentration of larger establishments (with over 100–500 employees per firm) than the most of the other regions we analyzed.

Figure 10 How Portland Compares with Other Regions in the USA

Employees							
PMSA		Self Employed	Stage 1 (2-9)	Stage 2 (10-99)	Stage 3 (100-499)	Stage 4 (500+)	Total
Portland	Workers	64,059	272,295	280,058	100,906	74,419	791,737
	Percent of Total	8%	34%	35%	13%	9%	100%
Seattle	Workers	96,631	374,569	442,573	169,656	163,680	1,247,109
	Percent of Total	8%	30%	35%	14%	13%	100%
Sacramento	Workers	49,989	223,395	242,901	96,511	57,439	670,235
	Percent of Total	7%	33%	36%	14%	9%	100%
San Jose	Workers	44,073	227,460	282,263	137,702	137,390	828,888
	Percent of Total	5%	27%	34%	17%	17%	100%
San Diego	Workers	72,609	385,776	419,213	171,072	120,855	1,169,525
	Percent of Total	6%	33%	36%	15%	10%	100%
Salt Lake City	Workers	35,751	147,740	164,445	64,335	50,449	462,720
	Percent of Total	8%	32%	36%	14%	11%	100%
Denver	Workers	72,519	364,673	336,837	126,677	126,713	1,027,419
	Percent of Total	7%	35%	33%	12%	12%	100%
Boise	Workers	23,820	76,390	69,962	22,250	22,287	214,709
	Percent of Total	11%	36%	33%	10%	10%	100%
Austin	Workers	48,802	199,885	206,141	85,714	53,208	593,750
	Percent of Total	8%	34%	35%	14%	9%	100%
Total		508,253	2,272,183	2,444,393	974,823	806,440	7,006,092
Percent of Total		7%	32%	35%	14%	12%	100%
Establishments							
PMSA		Self Employed	Stage 1 (2-9)	Stage 2 (10-99)	Stage 3 (100-499)	Stage 4 (500+)	Total
Portland	Establishments	64,059	91,954	12,006	588	68	168,675
	Percent of Total	38%	55%	7%	0.3%	0.04%	100%
Seattle	Establishments	96,631	122,599	18,859	984	109	239,182
	Percent of Total	40%	51%	8%	0.4%	0.05%	100%
Sacramento	Establishments	49,989	75,884	10,323	596	50	136,842
	Percent of Total	37%	55%	8%	0.4%	0.04%	100%
San Jose	Establishments	44,073	76,962	11,359	793	106	133,293
	Percent of Total	33%	58%	9%	0.6%	0.08%	100%
San Diego	Establishments	72,609	131,117	17,847	1,000	114	222,687
	Percent of Total	33%	59%	8%	0.4%	0.05%	100%
Salt Lake City	Establishments	35,751	51,739	6,811	361	48	94,710
	Percent of Total	38%	55%	7%	0.4%	0.05%	100%
Denver	Establishments	72,519	129,752	14,430	751	101	217,553
	Percent of Total	33%	60%	7%	0.3%	0.05%	100%
Boise	Establishments	23,820	26,765	3,119	141	17	53,862
	Percent of Total	44%	50%	6%	0.3%	0.03%	100%
Austin	Establishments	48,802	69,692	8,605	473	41	127,613
	Percent of Total	38%	55%	7%	0.4%	0.03%	100%
Total		508,256	776,468	103,360	5,687	654	1,394,417
Percent of Total		36%	56%	7%	0.4%	0.05%	100%

Source: Youreconomy.org.

The high concentration of self-employed businesses and low proportion of larger businesses is evident in Clackamas County, where about 92% of the establishments had less than 9 workers in 2008 (source; Dun & Bradstreet).

It is also apparent that Clackamas County has a very high share of “home grown” businesses that are locally headquartered. **Figure 11** indicates that virtually all of the net new establishments added in Clackamas County over the 2003–2008 timeframe were considered to be “resident” establishments with an Oregon headquarters. Locally-owned businesses are often cited as having a more beneficial economic impact on the communities they serve. In fact, researchers from Penn State University have found that many smaller, locally-owned businesses are better for growing incomes in a county than the presence of larger companies owned by out of state companies. The authors of the study concluded that “encouraging local businesses would be better for growth than recruiting larger firms from outside the county.”<sup>3</sup>

### Figure 11 Clackamas County Establishment Headquarters

2003 to 2009

Establishments	2003	2008	Change	%
Noncommercial (public & non profits)	1,458	1,404	-54	-4%
Nonresident (out-of-state HQ)	1,181	1,006	-175	-15%
Resident (Oregon-based HQ)	22,499	31,574	9,075	40%

Source: Dun & Bradstreet Corporation

While small emerging companies hold much promise for local investment and long-term job growth, mid-size companies are currently more bullish on hiring this year. A survey of CEOs by Deloitte found that 93 percent think their own companies will grow, and 70 percent plan to hire this year. For comparison, a similar survey by the U.S. Chamber of Commerce found that only 19 percent of the small business owners plan to add employees this year. These mid-size companies have annual gross revenue of between \$50 million and \$1 billion.

Clackamas County is the home of 10 of Oregon’s fastest-growing Top 100 private companies. According to the Portland Business Journal, the list of fast-growing private companies (based on 2009 to 2010 revenue growth) includes:

- Directors Mortgage (rank #2): residential mortgage banking; Lake Oswego
- Funnelbox, Inc. (rank #8): media/video production: Oregon City
- Zupanic Rathbone Law Group (rank #16): legal services; Lake Oswego

<sup>3</sup> Goetz, Stephan and Fleming, David; Economic Development Quarterly, *Does Local Firm Ownership Matter?*, April 28, 2011.

## Clackamas County Economic Landscape Update

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- The Bank of Oswego (rank #26): banking; Lake Oswego
- EthicsPoint, Inc. (rank #46): enterprise risk consulting; Lake Oswego
- Johnson RV (rank #49): recreation vehicle sales; Sandy
- Cook Security Group (rank #78): service/installation of security systems; Milwaukie
- InfoGroup Northwest (rank #82): employee search/consultants; Lake Oswego
- Vigilant Inc. (rank #83): software for community health care; Wilsonville

Clackamas County is also home to many large publically traded companies, including several key cluster businesses, which are identified in the next section.

## III Key Clusters

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### III.A. OVERALL FINDINGS

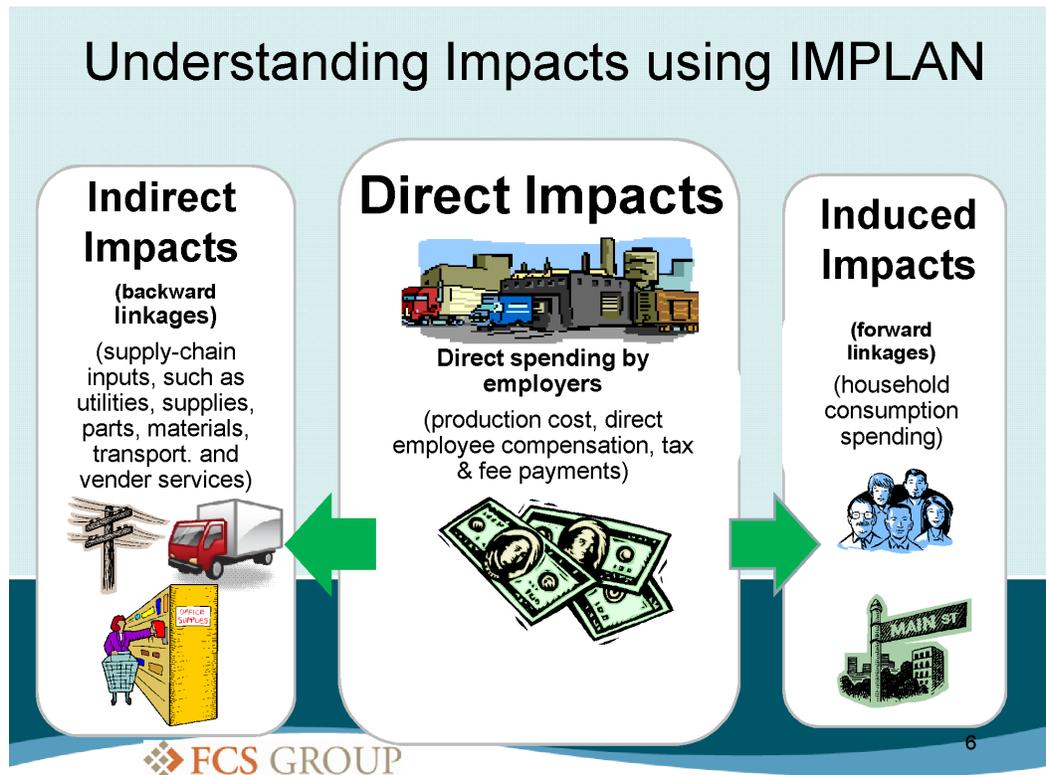
To update prior Economic Landscape findings, FCS GROUP utilized the IMPLAN model (Impact analysis for planning model) for Clackamas County and the greater Portland region (9-county area) using 2009 data (adjusted to 2011 dollar values).

The IMPLAN model is an economic model that a useful tool for understanding the inputs and outputs of local and regional economies by measuring the direct and secondary benefits of changes in industrial output (sales), GDP (valued added), income, taxes, and employment. The IMPLAN model takes into account national, regional and local economic trends and spending multipliers to estimate: direct impacts (income, sales, wages, profits associated directly with producing a good or service); indirect impacts (backward linkages including supplies/services needed as inputs for producing the good or service); and induced impacts (forward linkages that depict how the direct and indirect impacts cause a multiplier effect in the regional economy as income is spent and re-spent on various goods, services and investments. The IMPLAN model includes up to 506 specific industry sectors, of which 299 are represented in Clackamas County.

**Figure 12** illustrates how IMPLAN uses input-output multipliers to estimate how direct spending by businesses translates into indirect impacts (purchases from suppliers) and induced impacts (household spending based on employee earnings). Please refer to [www.implan.com](http://www.implan.com) and **Appendix A** for more detailed information regarding the IMPLAN model.

The overall results indicate that the 9-county regional economy grew between 2006 and 2010 from \$118 billion to \$121 billion in real gross domestic product (GDP), measured in constant 2011 dollars. In comparison, between 2006 and 2010, the Clackamas County economy grew from \$14.5 billion to \$15.5 billion in GDP. The relative share of the regional GDP that is attributed to Clackamas County is estimated to have increased slightly from 12.5% in 2006 to 12.8% in 2010.

Figure 12 IMPLAN Model Impacts



### III.B. KEY CLUSTERS

The findings from the IMPLAN analysis reveals how the top industry clusters within Clackamas County were impacted by the recent economic recession.

The analysis used to update information regarding key clusters in Clackamas County, identified key clusters has having the following attributes:

- Employment sectors with a relatively high or increasing location quotient (LQ) relative to the nine-county PMSA Portland region.<sup>4</sup>
- The relative contribution a particular sector has county income levels. Key clusters often pay above-average wage rates.

<sup>4</sup> Location Quotient (LQ) indicates the relative share of the amount of economic activity (GDP) produced within a employment sector in Clackamas County in comparison to the share of economic activity that sector contributes to the larger region. For example, if the annual GDP generated by professional & business services accounts for 20% of the county's GDP, and accounts for 10% of the GDP within the region, the County's LQ for professional & business services is 2.0 (20/10).

## Clackamas County Economic Landscape Update

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The prior Economic Landscape study identified the following 10 key clusters within Clackamas County:

- **Nurseries and Greenhouses** (primarily includes growing plants, herbs, trees, and shrubs for wholesale markets).
- **Transportation & Distribution** (includes truck transport & warehousing).
- **Wood Product Manufacturing** (includes lumber mills and finished wood products).
- **Professional & Business Services** (includes professional business consulting, finance, insurance, engineering, design, and related services, but does not include commercial banking, advertising and photography services).
- **Wholesale Trade** (includes businesses that sell goods to other businesses, as the agent or distributor between the producer and the retail seller of goods).
- **Advanced Manufacturing – Metals and Machinery** (includes manufacturing of primary and fabricated metal products, such as metal hand tools and machinery manufacturing and assembly).
- **High Tech** (includes manufacturing of computer and measuring equipment, software design and computer programming).
- **Health Care** (primarily includes health service occupations).
- **Food and Beverage Processing** (includes producers of food and beverages for wholesale or retail use. This is an emerging cluster that was identified in 2010, since it has experienced growth in Clackamas County in spite of the recent economic recession).
- **Agriculture and Food Production cluster** (includes businesses focused on food production as well as related industries, such as fertilizer and pesticide manufacturing, medicinal botanical manufacturing, and support industries).

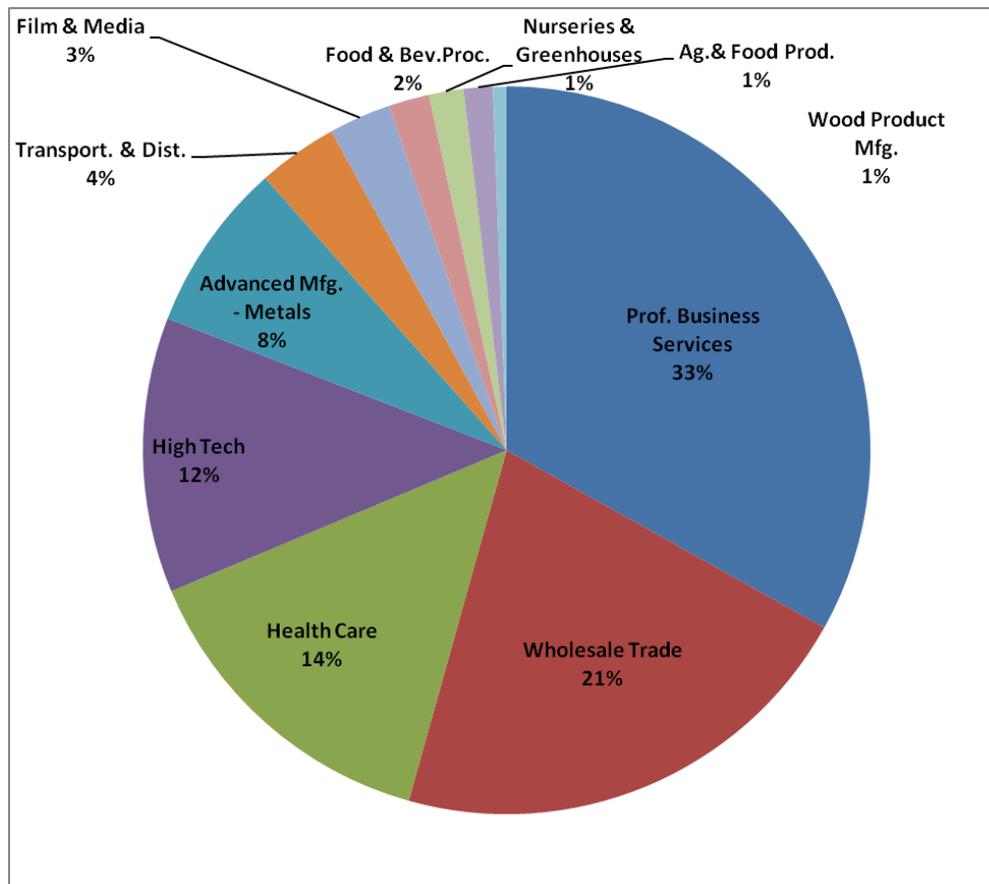
**The Film and Media Production cluster is an emerging cluster** that is still evolving in Clackamas County with the production of many television series (i.e., Leverage) occurring in the Clackamas Industrial Area, and several multi-media companies based in Clackamas County. In addition to motion picture and video production, this cluster includes advertising, photography, publishing, sound recording, broadcasting, writers, performers and agents/promoters of performing arts and sports.

Total GDP in Clackamas County was approximately \$15.5 billion in 2010. The combined direct impact of the 10 key clusters combined with the Film and Media cluster in Clackamas County accounted for approximately \$7.7 billion in direct annual GDP (nearly 50% of the total county GDP) and accounted for 42% of the county's jobs. According to the IMPLAN model for Clackamas County, the average employee compensation for the key clusters was

**Clackamas County Economic Landscape Update**

\$53,000 in 2010, which was 40% above the County's average wage rate.<sup>5</sup> As indicated in **Figure 13**, the top five key clusters (as measured by GDP) include: professional & business services (\$2.6 billion); wholesale trade (\$1.6 billion); health care (\$1.1 billion); high tech (\$942 million), and advanced manufacturing - metals (\$562 million).

**Figure 13 Annual Contributions of Clusters in Clackamas County, 2010** (distribution of 11 Clusters combined annual GDP of \$7.7 billion)



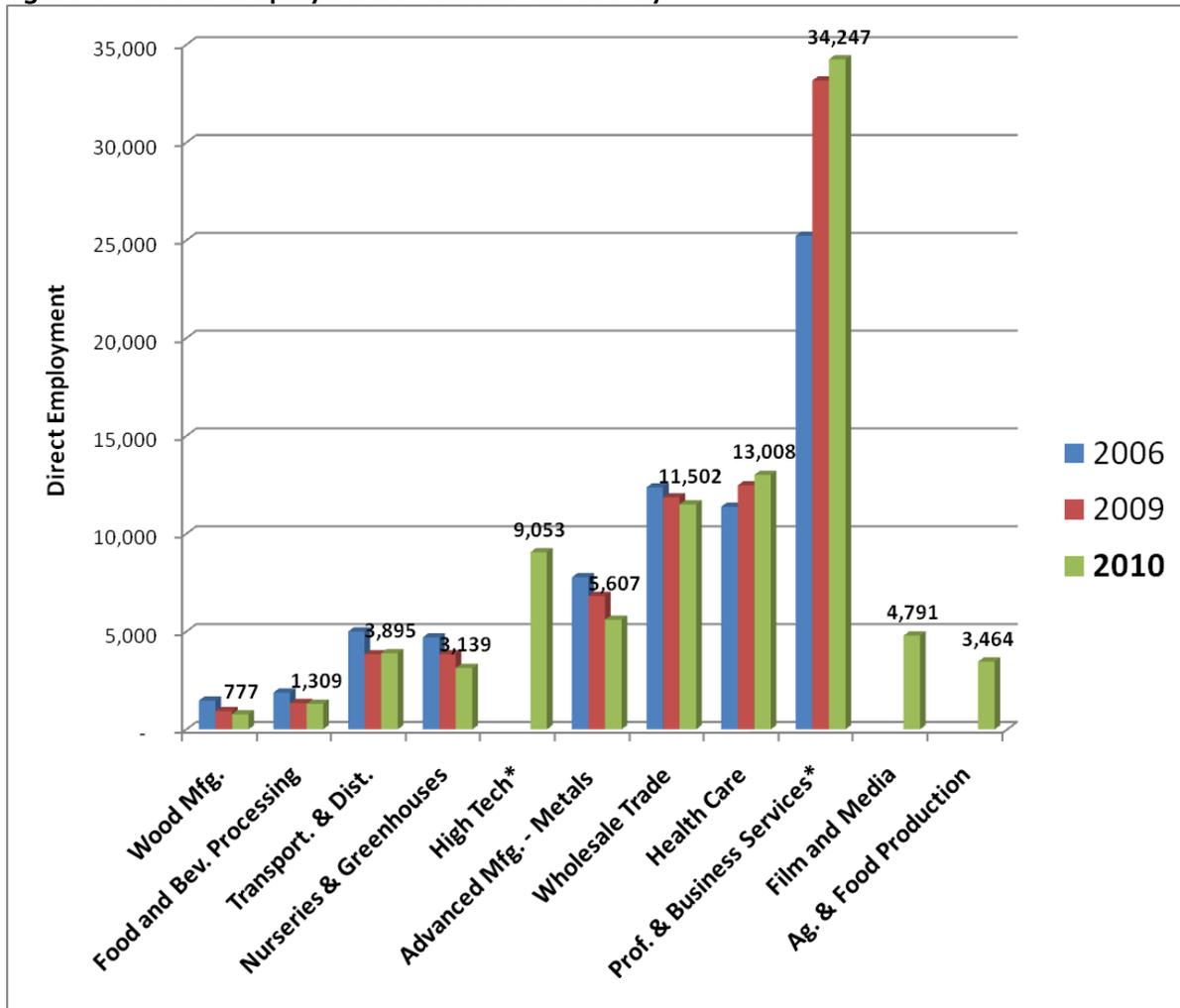
Source: IMPLAN model for Clackamas County, 2010, adjusted to 2011 dollars.

**Figure 14** indicates that the job gains in professional & business services, and health care more than counted declining employment in all other key clusters between 2006 and 2010.

<sup>5</sup> Employee compensation derived using the IMPLAN model is derived from an estimate of total employment (includes workers covered and not covered by unemployment insurance) divided by total direct payroll and related benefits (including health care benefits). Hence, these estimates of compensation should not be directly compared with other estimates prepared by the Oregon Employment Dept., which only reflect covered employment and direct payroll.

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Figure 14 Cluster Employment in Clackamas County



Source: IMPLAN model for Clackamas County. \* Employment sectors defined for inclusion within the high tech cluster were expanded in 2010 to include computer programming. Also, the definition of the professional & business services cluster was refined in 2010 to exclude advertising/marketing and photography services (now reflected in film and media cluster). Hence direct comparison with prior years should be avoided for these clusters.

The following sections describe results derived from the analysis of each of the key clusters.

## Clackamas County Economic Landscape Update

### III.B.1. Professional Business Services

Professional consulting, finance and insurance services and other businesses services are comprised of services rather than traditional traded goods. The service sectors that make up this cluster include accounting, asset management, business consulting, financial management, wealth management, insurance, law, architecture, engineering, planning, computer systems and management consulting.

Establishments within this cluster range in size from small independents to large international practices. This cluster derives only 8% of its sales from customers outside 9 county region, and includes 15 of the County's Top 100 private employers.

Representative Professional & Business Service Businesses	
Name	Location
Mentor Graphics Corp. *	Wilsonville
Meridian Technology Group Inc. *	Lake Oswego
Ciber Inc. *	Lake Oswego
Jacobs Engineering Group Inc. *	Lake Oswego
United Healthcare Services, Inc. *	Lake Oswego
Alpine Mortgage *	Lake Oswego
Travelers Indemnity Co. *	Lake Oswego
Otak Inc. *	Lake Oswego
Huron Consulting Services LLC *	Lake Oswego
Manufacturers & Traders Trust Co. *	Lake Oswego
Nationwide Mutual Insurance Co. *	Clackamas
Wells Fargo Bank NA *	Clackamas
Black & Veatch Corporation *	Lake Oswego
Princeton Property Management *	Milwaukie
D A Davidson & Co. Inc.*	Lake Oswego

Source: Oregon Employment Department; FCS GROUP

\* Indicates top 100 County Business Listing

#### Professional Business Services Cluster

##### Current Stats for Clackamas County

**Annual GDP (Value Added):** \$2.6 Billion

**Cluster Share of County GDP:** 17%

**Exports/Sales from Outside Region:** 8%

**Direct Employment:** 34,247 jobs

**County Businesses:** 2,535

**Number of Businesses in Top 100:** 15

**10-year Job Growth Forecast:** 31 percent

**Cluster Location Quotient (LQ):** 0.9

Source: compiled by FCS GROUP based on data from IMPLAN (2010), adjusted to 2011 dollars; with 10-year forecast by Oregon Employment Dept.

\* Please refer to definition of LQ on next page.

#### Professional & Business Services Cluster North American Industrial Classification System (NAICS) Categories

**5222: Non-depository credit intermediation.** Such as credit unions.

**5223: Activities related to non-depository credit intermediation.** Such as mortgage loan brokers.

**523: Securities, commodity contracts, financial investments and related activities.**

**524: Insurance carriers and related activities.**

**525: Funds, trusts and other financial vehicles.**

**531: Real estate leasing, agents, brokers, property managers and related activities.**

**541: Professional scientific and technical activities.**

Such as legal services, accounting, payroll services, architecture, engineering, surveying, building inspection, graphic design, computer systems design, management consulting, environmental, consulting and veterinary services.

Figure 15 Location Quotient Trends: Professional &amp; Business Services

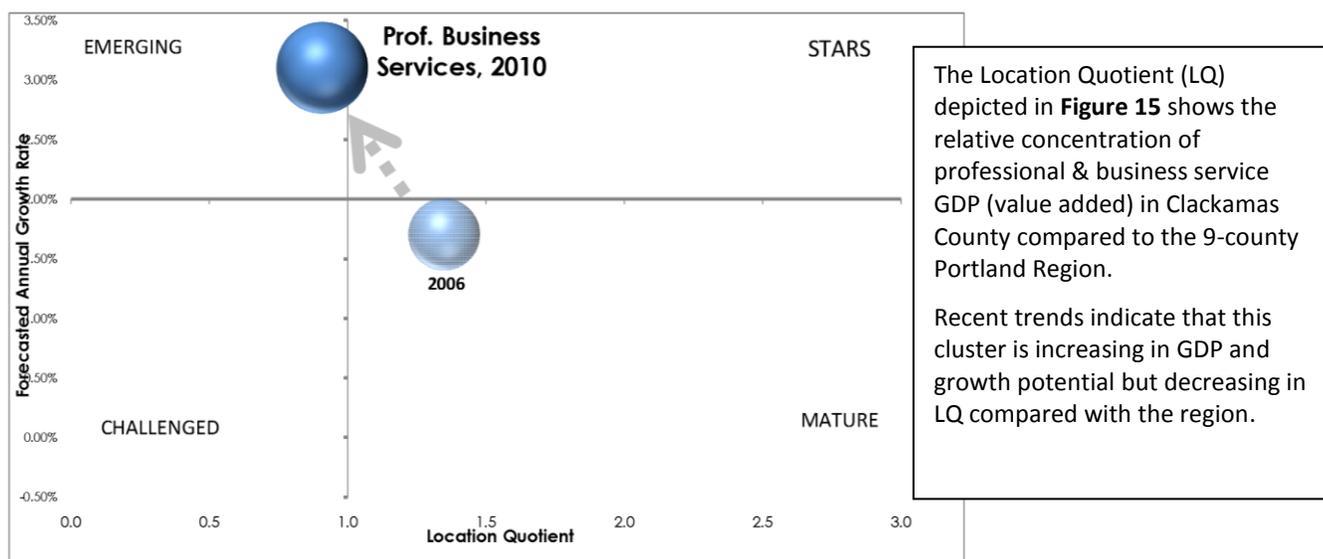


Figure 16 Professional Business Services Economic Impacts, Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	1.31	1.02	0.90
Contribution to GDP	5%	18%	17%
# of Businesses	2,008	2,570	2,535
Average Compensation	\$42,000	\$33,000	\$29,859
Labor Income	\$1,068,745,000	\$1,085,108,000	\$1,022,580,000
Total GDP (Value Added)	\$2,630,585,000	\$2,772,647,000	\$2,550,340,000
% Traded Outside Region	n/a	n/a	8%
Output	n/a	\$4,289,124,000	\$3,935,470,000
Direct Jobs	25,233	33,164	34,247
Secondary Jobs	23,783	20,082	17,958
Total Employment	49,016	53,246	<b>52,205</b>

\* note, prior years not directly comparable since 2012 methodology amended to exclude advertising & photography services which are now reflected in the Film & Media cluster.

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available

Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The long-term outlook for the professional and business service cluster is positive. As indicated in Figure 16, while the average compensation in this cluster has fallen since 2006 and remains below the county-wide average and for all jobs, total GDP (valued added) has remained stable and direct employment increased between 2006 and 2010 (this large increase may be due to more part-time and temporary workers being hired). This cluster should continue to be a leading indicator with positive growth expected as overall economic conditions improve regionally and nationally.

### III.B.2. Health Care

Health care is a vital element of the Clackamas County economy, and has grown steadily in spite of challenging economic times. Health care jobs tend to pay above average wages, and many of Clackamas County's largest employers are in this cluster. Significant levels of planned investments by private and non-profit health care providers in Clackamas County are underway. IMPLAN model results from 2010 indicate that about 10% of health care expenditure flow out of Clackamas County to the rest of the region.

Representative Health Care Businesses	
Name	Location
American Medical Response N.W. *	Milwaukie
Eye Health Northwest PC	Oregon City
Kaiser Foundation Health Plan of NW	Clackamas
Legacy Meridian Park Hospital *	Tualatin
Northwest Permanente, P.C. *	Clackamas
Providence Milwaukie Hospital *	Milwaukie
Providence Willamette Falls Hospital *	Oregon City
Rehab Specialists Inc. *	Milwaukie
Sunnyside Hospital *	Clackamas
Woman's Health Center of Oregon PC *	Oregon City

Source: Oregon Employment Department; FCS GROUP

\* Indicates top 100 County Business Listing

#### Health Care Cluster Current Stats for Clackamas County

**Annual GDP (Value Added):** \$1.1 Billion

**Cluster Share of County GDP:** 7.1%

**Exports/Sales from Outside Region:** n/a\*

**Direct Employment:** 13,008 jobs

**County Businesses:** 713

**Number of Businesses in Top 100:** 7

**10-year Job Growth Forecast:** 31%

**Cluster Location Quotient (LQ)\*:** 1.19

Source: compiled by FCS GROUP based on data from Oregon Employment Department, and IMPLAN (2010), adjusted to 2011 dollars.

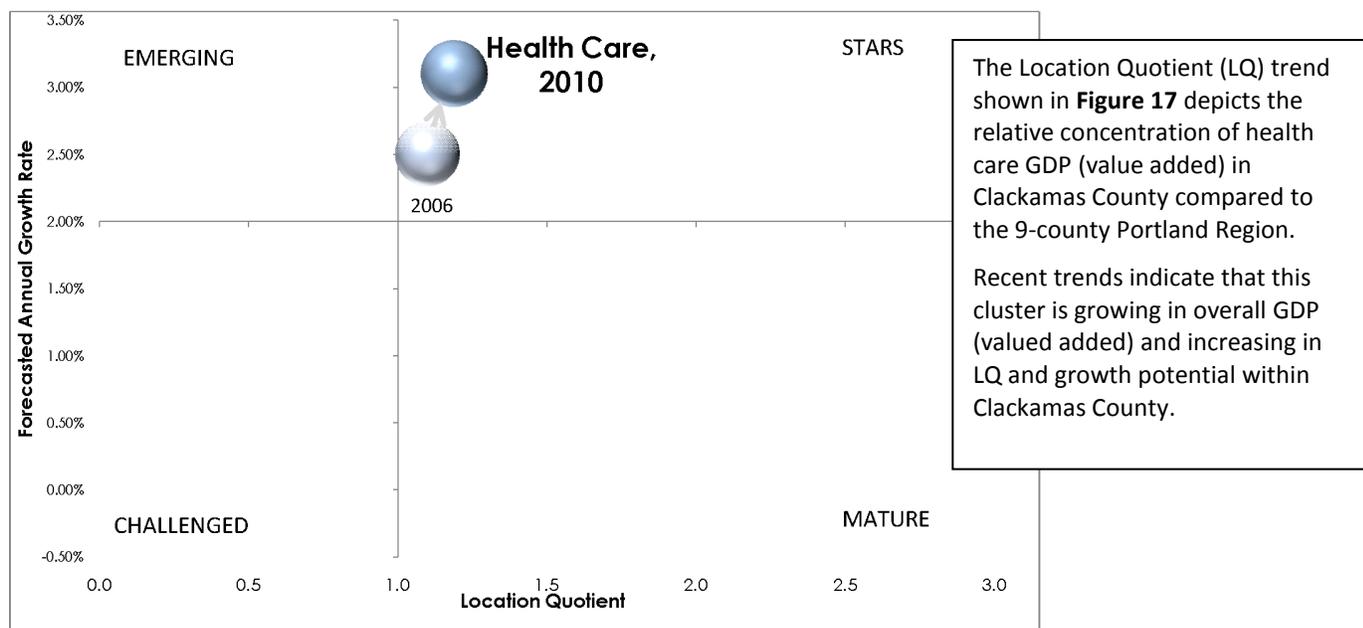
\*There is a net outflow of health care demand from Clackamas County to the rest of the MSA.

\*\* Please refer to definition of LQ on next page.

#### Health Care Sector North American Industrial Classification System (NAICS) Categories

**621 & 622:** Includes businesses which include offices of all health care specialists including physicians, dentists as well as all specialty doctors, hospitals, specialty care facilities

Figure 17 Location Quotient Trends: Health Care Cluster

Figure 18 Health Care Cluster Economic Impacts,  
Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	1.1	1.12	1.19
Contribution to GDP	8.0%	8.9%	7.1%
# of Businesses	599	225	713
Average Compensation	\$62,000	\$69,000	\$77,919
Labor Income	\$708,406,000	\$858,903,000	\$1,013,570,000
Total GDP (Value Added)	\$1,008,502,000	\$1,109,926,000	\$1,103,310,000
% Traded Outside Region	n/a	n/a	n/a
Output	n/a	\$2,293,690,000	\$1,765,600,000
Direct Jobs	11,379	12,470	13,008
Secondary Jobs	-	10,430	11,163
Total Employment	11,379	22,900	24,171

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available

Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the health care cluster is very positive. Average compensation is well above the county-wide average for all jobs, and continues to trend upwards. Total GDP (valued added) and direct employment increased by 9% between 2006 and 2010 (see **Figure 18**). As the county and regional population increase and the amount of people over the age of 65 expands, the health care cluster should continue to experience above average growth and investment.

**Clackamas County Economic Landscape Update****III.B.3. Wholesale Trade**

Wholesale trade is an essential part of the greater Portland regional economy. Wholesalers connect goods producers--from raw materials to finished products, with distributors and retailers in a cost-effective and time-sensitive manner. In addition to long time employers in Clackamas County, such as Kroger, OREPAC Building Products, Pacific Seafood Company, Sysco Foods, and Smith Kline Beecham, Clackamas County is also home to younger firms that are rapidly expanding.

The number of Clackamas County businesses in this cluster increased from 1,101 in 2008 to 1,194 in 2010. This cluster now has 14 of the Top 100 private companies in Clackamas County.

Representative Wholesale Trade Businesses	
Name	Location
Kroger Inc. *	Clackamas
Unified Western Grocers Inc. *	Portland
Sysco Portland Inc. *	Wilsonville
Kendal Floral Supply LLC *	Canby
Pacific Sea Food Company Inc. *	Clackamas
Acosta Sales & Marketing Company *	Tualatin
Kahut Waste Services *	Clackamas
Core Mark International Inc. *	Clackamas
Blackwell North America Inc. *	Lake Oswego
Biotronik Inc. *	Lake Oswego
Owens & Minor *	Wilsonville
General Distributors Inc. *	Oregon City
Orepac Building Products Inc. *	Wilsonville
Smithkline Beecham Corporation *	West Linn
Cisco Systems MFG Inc. *	Lake Oswego

Source: Oregon Employment Department; FCS GROUP

\* Indicates top 100 County Business Listing

**Wholesale Trade Cluster****Current Stats for Clackamas County**

**Annual GDP (Value Added):** \$1.6 Billion

**Cluster Share of County GDP:** 10%

**Exports/Sales from Outside Region:** 45%

**Direct Employment:** 11,502 jobs

**County Businesses:** 1,186

**Number of Businesses in Top 100:** 14

**10-year Job Growth Forecast:** 17%

**Cluster Location Quotient (LQ)\*:** 1.35

Source: compiled by FCS GROUP based on data from IMPLAN (2010), adjusted to 2011 dollars; and Oregon Employment Dept. 10-year forecast.

\* Please refer to definition of LQ on next page.

**Professional Business Services Sector  
North American Industrial Classification  
System (NAICS) Categories**
**423: Wholesale Trade, Durable Goods.**

Includes businesses that sell durable goods to other businesses. Durable goods may be new or used items with an expected life of three or more years. Typical goods include motor vehicles, furniture, construction materials, machinery, and appliances.

**424: Wholesale Trade, Nondurable Goods.**

This industry is focused on nondurable goods with a normal life of less than three years. Typical nondurable products include paper, chemicals, drugs, textiles, apparel, footwear, groceries, farm products, petroleum, alcoholic beverages, food, books and nursery stock.

**425: Wholesale Trade, Electronic Goods.**

Businesses include wholesale electronic markets, agents and brokers for the sale of goods owned by others. They act on behalf of the buyers and sellers of goods.

Figure 19 Location Quotient Trends: Wholesale Trade

Figure 20 Wholesale Trade Economic Impacts,  
Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	1.22	1.24	1.35
Contribution to GDP	11.1%	9.9%	10.6%
# of Businesses	1,101	1,194	1,186
Average Compensation	\$69,000	\$68,000	\$80,742
Labor Income	\$853,434,000	\$805,877,000	\$928,690,000
Total GDP (Value Added)	\$1,622,082,000	\$1,506,886,000	\$1,633,640,000
% Traded Outside Region	n/a	n/a	45%
Output	n/a	\$2,298,725,000	\$2,091,310,000
Direct Jobs	12,370	11,863	11,502
Secondary Jobs	13,186	9,328	8,907
Total Employment	25,556	21,191	20,409

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available  
Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the wholesale trade cluster is positive. The average compensation for this cluster is well above the county-wide average for all jobs. Total GDP (valued added) has increased slightly since 2006 but direct employment has decreased by 7% (see Figure 20).

### III.B.4. Advanced Manufacturing – Metals & Machinery

Metals and machinery manufacturing is a mature industry within Clackamas County that has generally done well in spite of the recent economic recession. Clackamas County's metals and machinery industries produce a wide range of goods such as computer components, jet engines, turbines for wind power generators, streetcars, rebar and multipurpose tools. Some of Oregon's largest metals employers, such as Consolidated Metco, Oregon Cutting Systems, Oregon Steel Mills and Precision Castparts have established roots in Clackamas County.

This cluster added 13 business establishments between 2008 and 2010, and recorded an increase in valued added. Oregon's exports of metals and machinery approached \$1.6 billion in 2010, up 38% from the preceding year.

#### Advanced Manufacturing – Metals and Machinery Cluster Current Stats for Clackamas County

**Annual GDP (Value Added):** \$582 M

**Cluster Share of County GDP:** 4%

**Exports/Sales from Outside Region:** 77%

**Direct Employment:** 5,607 jobs

**County Businesses:** 223

**Number of Businesses in Top 100:** 8

**10-year Job Growth Forecast:** 23%

**Cluster Location Quotient (LQ) \*:** 2.62

*Source: compiled by FCS GROUP based on data from IMPLAN (2010), adjusted to 2011 dollars; and Oregon Economic Development 10-year forecast.*

*\* Please refer to definition of LQ on next page.*

#### Representative Metals & Machinery Businesses

Name	Location
PCC Structurals, Inc. *	Clackamas
Oregon Cutting Systems *	Portland
Oregon Iron Works Inc. *	Clackamas
Cleanpak International Inc. *	Clackamas
Benchmade Knife Company Inc. *	Oregon City
Wriglesworth and Willock Metal *	Milwaukie
The Stanley Works *	Milwaukie
Sandvik Medical Solutions	Oregon City
SSI Shredding Systems Inc. *	Wilsonville
Eagle Foundry Co.	Eagle Creek

*Source: Oregon Employment Department Compiled by FCS GROUP*

*\* Indicates top 100 County Business Listing*

#### Advanced Manufacturing- Metals & Machinery Cluster North American Industrial Classification System (NAICS) Categories

**331: Primary Metal Manufacturing.** This sector includes the smelting or refinement of ferrous and non ferrous metals. Establishments in this sector also manufacture metal alloys used in rolling and extruding operations to make sheet, strip, bar, rod, or wire for castings and other basic metal products.

**332: Fabricated metal Product Manufacturing.** Industries in this sector transform metal into intermediate or end products, excluding machinery, computers, electronics, metal furniture and related products. Fabricated metal processes include forging, stamping, bending forming, machining, welding and assembling. Examples include metal pipe manufacturing.

**333: Machinery Manufacturing.** Industries in this sector transform metal into machinery or tools used for the manufacture of goods.

## Clackamas County Economic Landscape Update

Figure 21 Location Quotient Trend: Advanced Manufacturing – Metals &amp; Machinery

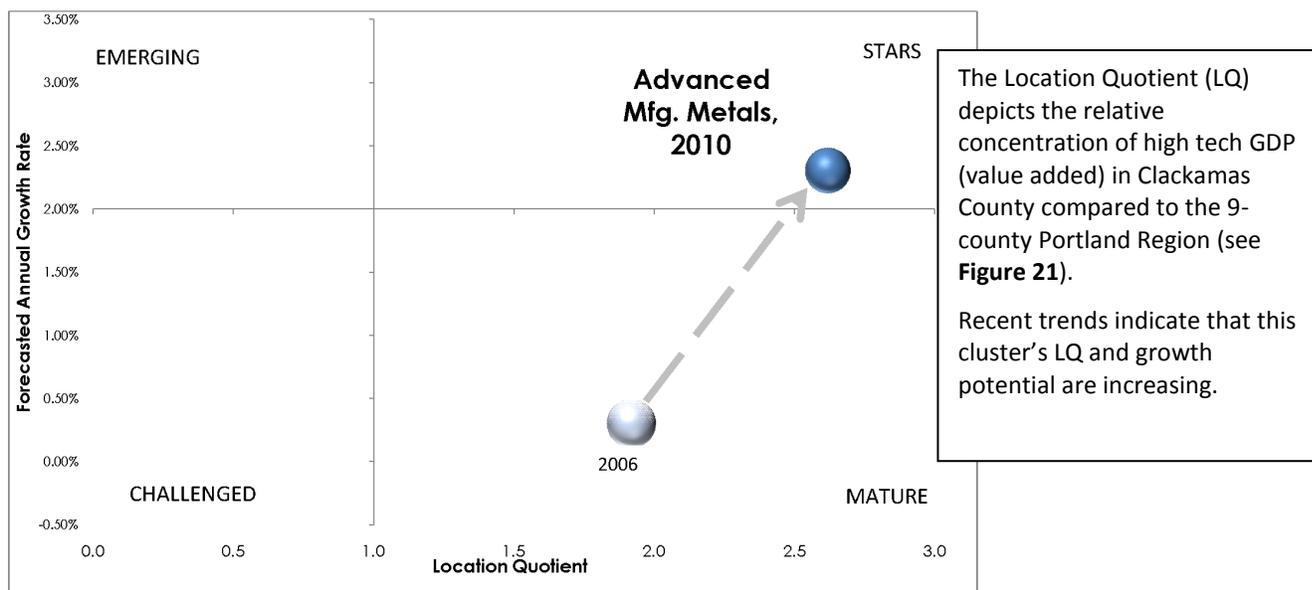


Figure 22 Advanced Mfg. – Metals &amp; Machinery Economic Impacts, Clackamas County, 2006 to 2010

	2006	2009	2010
Industry Location Quotient	1.92	1.85	2.62
Contribution to GDP	3.0%	4.9%	3.8%
# of Businesses	212	225	223
Average Compensation	\$65,000	\$66,000	\$71,227
Labor Income	\$487,517,000	\$448,980,000	\$399,370,000
Total GDP (Value Added)	\$741,874,000	\$746,120,000	\$581,800,000
% Traded Outside Region	n/a	n/a	77%
Output	n/a	\$1,815,521,000	\$1,316,820,000
Direct Jobs	7,773	6,820	5,607
Secondary Jobs	7,690	4,304	4,224
Total Employment	15,463	11,124	9,831

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available

Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the metals and machinery manufacturing cluster is improving. The average compensation in this cluster is well above the county-wide average for all jobs. Total GDP (valued added) has fallen by 22%, and direct employment has fallen by 28% between 2006 and 2010 (see Figure 23).

Clackamas County Economic Landscape Update

### III.B.5. High Tech

The Advanced Technology—High Tech cluster continues to be one of Clackamas County's leading clusters, and the average wages are significantly higher than virtually all other sectors. While overall job growth in has slowed since 2006, the value of high tech exports has grown in recent years. Clackamas County's high-tech cluster includes dozens of industries that manufacture a variety of electronic components and software systems for computers, energy, transportation, aerospace, motor vehicles and defense-related products.

#### Advanced Technology - High Tech Cluster Current Stats for Clackamas County

**Annual GDP (Value Added):** \$942 M

**Cluster Share of County GDP:** 6%

**Exports/Sales from Outside Region:** 74%

**Direct Employment:** 9,053 jobs

**Businesses in Cluster:** 289

**Number of Businesses in Top 100:** 12

**10-year Job Growth Forecast:** -14%

**Cluster Location Quotient (LQ)\*:** .84

*Source: compiled by FCS GROUP based on data from IMPLAN (2010), adjusted to 2011 dollars; and Oregon Employment Dept. 10-year forecast.*

*\* Please refer to definition of LQ on next page.*

Representative High Tech Businesses	
Name	Location
Xerox Corporation *	Wilsonville
TYCO Electronics Corp. *	Wilsonville
Flir Systems, Inc. *	Wilsonville
Oeco LLC *	Milwaukie
Micro Systems Engineering *	Lake Oswego
Johnson Controls Battery Group *	Canby
Autodesk Inc. *	Lake Oswego
Eaton Corporation *	Lake Oswego
Sabrix Inc.*	Lake Oswego
Coherent Inc. *	Wilsonville
Motorola Inc. *	Lake Oswego
ADP Inc. *	Clackamas

*Source: Oregon Employment Department; FCS GROUP*

*\* Indicates top 100 County Business Listing*

#### Advanced Technology - High Tech Sector North American Industrial Classification System (NAICS) Categories

##### **334: Computer and Electronic Product Manufacturing.**

This includes establishments that manufacture computers, computer peripherals (such as printers), medical instruments, communications equipment and electronic components used in a wide variety of consumer and defense-related products.

##### **335: Electrical equipment, Appliances and Component manufacturing.**

Industries in this sector manufacture products that generate, distribute and use electrical power. This includes both small and major electrical appliances and parts, such as motors, generators, transformers, gauges and switches. Devices that store electrical power (e.g. batteries) or transmit electricity (e.g., insulated wires and cables) are included in this sector

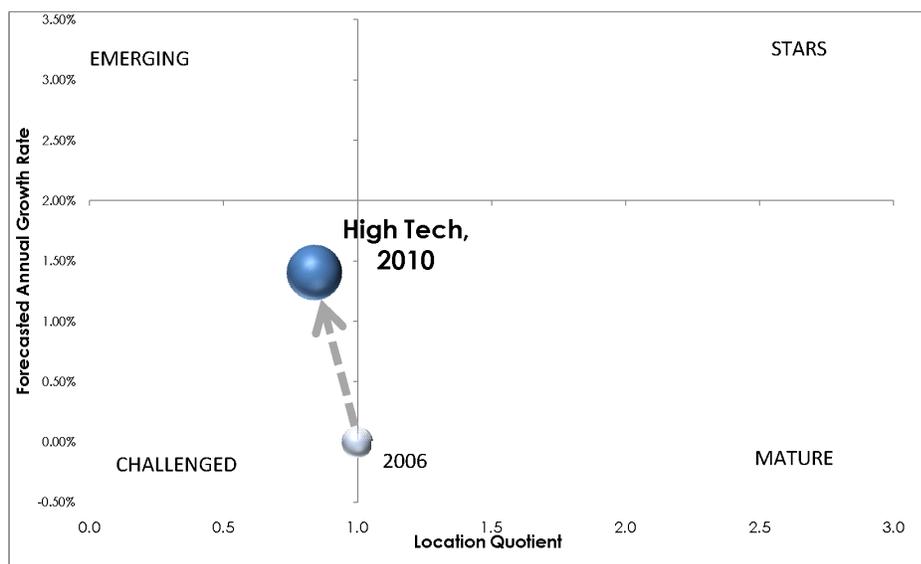
##### **371-372: Computer Programming and Systems Design\***

**511210: Software Publishers.** This is comprised of businesses that are primarily engaged in computer software publishing and/or reproduction. These businesses carry out the operations necessary to design, produce, document, distribute and provide related high tech support services.

*\* segments added in 2012.*

## Clackamas County Economic Landscape Update

Figure 23 Location Quotient Trends: Advanced Technology – High Tech



The Location Quotient (LQ) depicts the relative concentration of high tech GDP (value added) in Clackamas County compared to the 9-county Portland Region (see **Figure 23**).

Recent trends indicate that this cluster is growing in overall GDP (valued added) and but decreasing in LQ

Figure 24 Advanced Technology–High Tech Economic Impacts, Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	1	0.60	0.84
Contribution to GDP	2%	4%	6.1%
# of Businesses	n/a	n/a	289
Average Compensation	\$69,000	\$95,000	\$83,559
Labor Income	\$362,347,000	\$405,364,000	\$756,460,000
Total GDP (Value Added)	\$391,130,000	\$666,386,000	\$942,320,000
% Traded Outside Region			74%
Output		\$1,922,677,000	\$2,163,470,000
Direct Jobs*	5,285	4,289	9,053
Secondary Jobs	8,390	5,372	9,619
Total Employment	13,675	9,661	18,672

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available. Also data for 2006 and 2009 are not directly comparable with 2010 because prior years did not reflect impact from computer programming businesses. Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The high-tech cluster in Clackamas County is one of the top traded clusters. As noted in **Figure 24**, the average employment compensation in this cluster is well above the county-wide average for all jobs. This sector accounts for about 6% of the county's annual GDP, and derives nearly 74 percent of its sales from customers located outside the region (domestic and foreign trade).

**Clackamas County Economic Landscape Update****III.B.6. Nurseries & Greenhouses**

Clackamas County is a leader in the production of plants, flowers and trees used for landscaping and decorations. Unfortunately, this cluster was hit hard by the recent downturn in the housing and construction industry. While the number of businesses within this cluster expanded from 117 to 142 between 2008 and 2010, total employment and gross domestic product (GDP) has declined significantly.

Recent growth in local and regional food and beverage manufacturing activity combined with a trend toward a “100-mile diet” could help expand the market potential for locally produced grains, fruits, nuts and berries. Also, strong export demand for organic food shipments to Asia and the Middle East is expected to continue. For example, as of June 2011, Oregon became the only U.S. state allowed to export blueberries to Korea. If these trends continue, new markets may help support this struggling yet important cluster.

**Nursery and Greenhouse Cluster  
Current Stats for Clackamas County****Annual GDP (Value Added):** \$118 M**Cluster Share of County GDP:** 0.8%**Exports/Sales from Outside Region:** 83%**Direct Employment:** 3,139 jobs**County Businesses:** 146**Number of Businesses in Top 100:** 1**10-year Job Growth Forecast:** 23%**Cluster Location Quotient (LQ)\*:** 2.56

*Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; and 10-year forecast from Oregon Employment Dept.*

*\* Please refer to definition of LQ on next page.*

<b>Representative Nursery &amp; Greenhouse Businesses</b>	
<b>Name</b>	<b>Location</b>
J. Frank Schmidt & Son Company	Boring
Gentry, Leo, Wholesale Nursery, Inc.	Damascus
ISELI Nursery, *	Boring
John Holmlund Nursery LLC	Boring
Terra Nova Nurseries Inc.	Canby
Van Meter & Son Nursery Inc.	Boring
YOSHITOMI BROS. INC.	West Linn
Northwoods Nursery Inc.	Molalla
Don Marjama Nursery Company Inc.	Sandy
Koida, Joe, Florist, Inc.	Milwaukie

*Source: Oregon Employment Department; FCS GROUP*

*\* Indicates top 100 County Business Listing*

**Nursery and Greenhouse Sector  
North American Industrial Classification System  
(NAICS) Categories****111421: Nursery and Tree Production****111422: Floriculture Production**

Description: includes businesses primarily engaged in growing and/or producing: nursery products, nursery stock, shrubbery, bulbs, fruit stock, sod, and floriculture products (e.g., cut flowers and roses, cut cultivated greens, potted flowering and foliage plants, and flower seeds) under cover and in open fields.

## Clackamas County Economic Landscape Update

Figure 25 Location Quotient Trends: Nurseries and Greenhouses

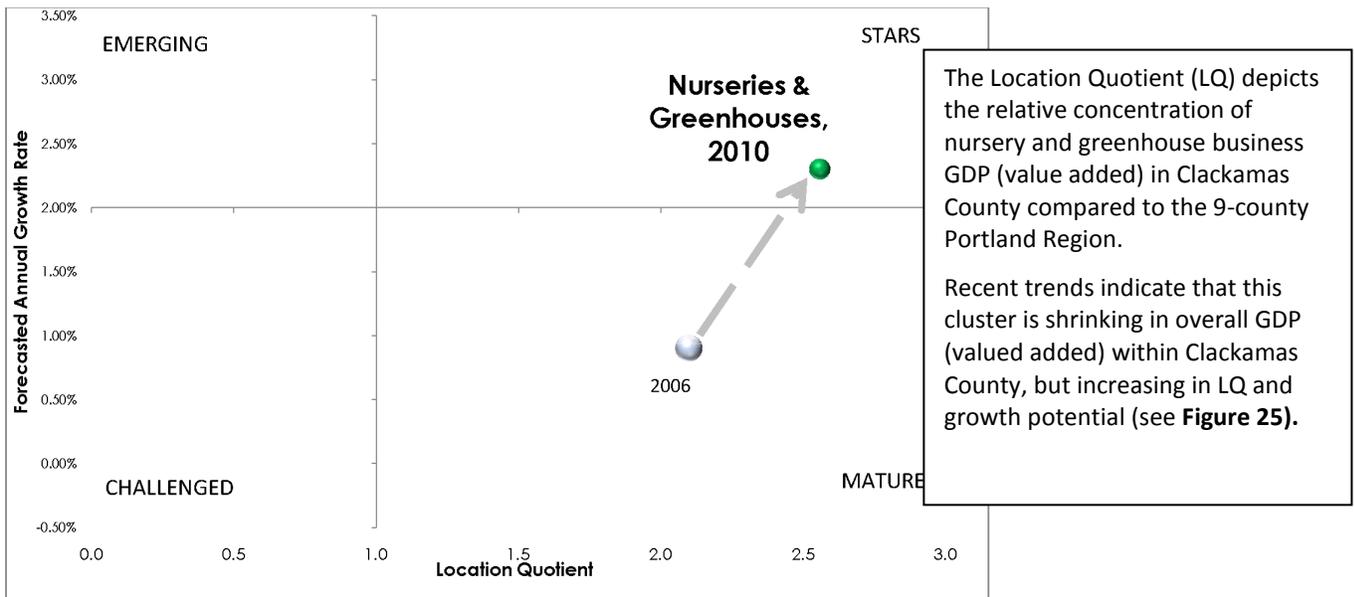


Figure 26 Nursery &amp; Greenhouse Cluster Economic Impacts, Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	2.1	2.08	2.56
Contribution to GDP	2%	1%	0.8%
# of Businesses	117	142	146
Average Compensation	\$32,000	\$30,000	\$34,186
Labor Income	\$150,593,000	\$114,031,000	\$107,310,000
Total GDP (Value Added)	\$220,443,000	\$135,963,000	\$117,910,000
% Traded Outside Region	n/a	n/a	83%
Output	n/a	\$241,590,000	\$185,540,000
Direct Jobs	4,700	3,821	3,139
Secondary Jobs	1,273	1,033	883
Total Employment	5,973	4,854	4,022

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available  
Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the nursery & greenhouse cluster is beginning to improve. The average compensation in this cluster is well below the county-wide average for all job, but has increased by 7% between 2006 and 2010. However, total GDP (valued added) decreased by 47% and direct employment fell by 33% between 2006 and 2010 (see **Figure 26**). This cluster should see relatively rapid growth once real estate development conditions improve and regional policies spur “buy local” trade practices.

**Clackamas County Economic Landscape Update****III.B.7. Trucking & Distribution**

Trucking and warehousing has long been served by Clackamas County's excellent rail and interstate highway connections. Trucking and warehousing activities closely follow wholesale trade patterns, which are an important component of the broader regional and national economy. Some of Clackamas County's largest employers including Safeway, USF Reddaway, and Rite Aid are contained in this cluster, While wage rate in this cluster tend to be well above the county-wide average, the recent national recession and increase in fuel costs had a severe impact on the trucking and distribution industry. It may take at least five years for this industry to reach employment levels that were attained in 2006.

**Trucking and Distribution Cluster  
Current Stats for Clackamas County\*****Annual GDP (Value Added):** \$274 M**Cluster Share of County GDP:** 1.7%**Exports/Sales from Outside Region:** 35%**Direct Employment:** 3,895 jobs**County Businesses:** 166**Number of Businesses in Top 100:** 5**10-year Job Growth Forecast:** 24%**Cluster Location Quotient (LQ)\*:** 1.86

*Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; and 10-year job forecast from Oregon Employment Dept.*

*\* Please refer to definition of LQ on next page.*

Representative Trucking & Distribution Businesses	
Name	Location
USF Reddaway, Inc. *	Clackamas
Safeway Stores, Inc. *	Clackamas
Interstate Distributor Co. *	Wilsonville
Gordon Trucking Inc. *	Clackamas
Rite Aid *	Wilsonville
Distribution Inc.	Clackamas
Ruan Transport Corporation	Canby
Kool Pak LLC	Lake Oswego
Beauty Systems Group LLC	Clackamas
J & D Refrigerated Services	Clackamas

*Source: Oregon Employment Department; FCS GROUP*

*\* Indicates top 100 County Business Listing*

**Trucking and Distribution Sector  
North American Industrial Classification  
System (NAICS) Categories**

**484: Truck Transportation.** Businesses within this sector provide over-the-road transportation using trucks and tractor trailers. This includes general freight distribution.

**111422: Warehousing and Storage.** This sector includes businesses that operate warehousing and storage facilities for general merchandise, refrigerated goods and other warehouse products. These establishments take responsibility for storing goods and keeping them secure. They also may provide incidental services involving shipping logistics, such as labeling, breaking bulk containers, inventory control, light assembly, order entry, packaging, price marking, ticketing and transportation arrangement

Figure 27 Location Quotient Trends: Trucking and Distribution

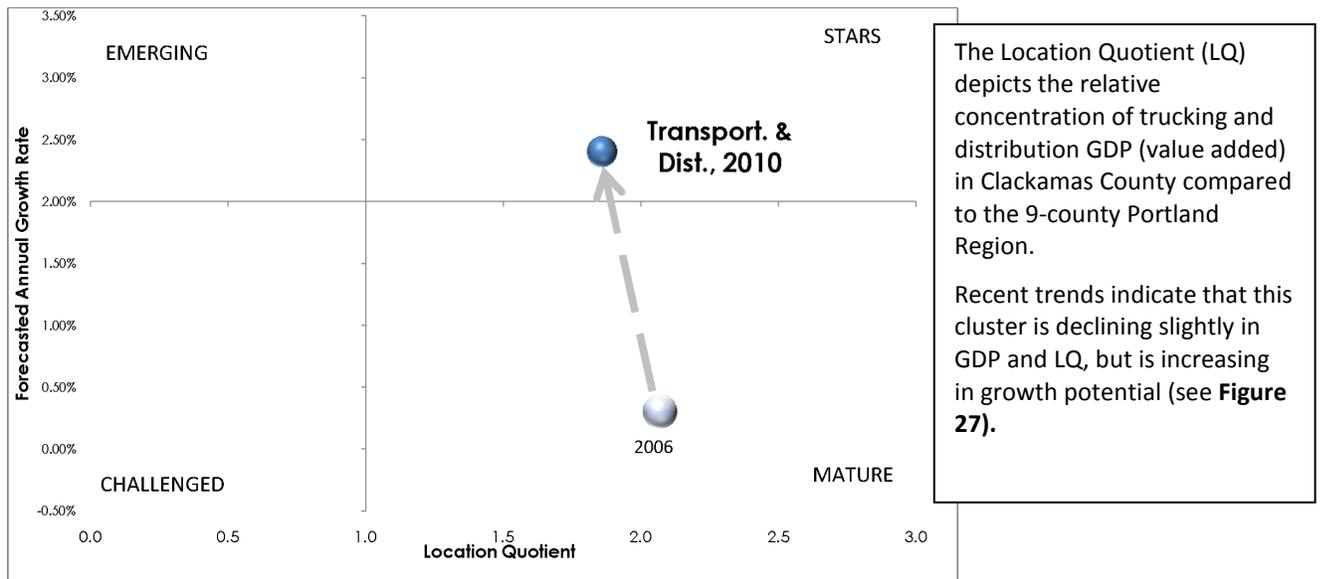


Figure 28 Trucking &amp; Distribution Economic Impacts, Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	2.07	1.59	1.86
Contribution to GDP	3%	2%	1.8%
# of Businesses	225	179	166
Average Compensation	\$56,000	\$49,000	\$58,341
Labor Income	\$367,032,000	\$188,020,000	\$227,240,000
Total GDP (Value Added)	\$491,980,000	\$280,272,000	\$273,760,000
% Traded Outside Region	40%	30%	35%
Output	n/a	\$540,376,000	\$468,940,000
Direct Jobs	4,997	3,844	3,895
Secondary Jobs	4,309	2,758	2,841
Total Employment	9,306	6,602	6,736

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available  
Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the trucking and distribution cluster is dependent upon the broader national and international economy. While the average level of employment compensation in this cluster is above the county-wide average for all jobs, total GDP (valued added) decreased by 44% and direct employment fell by 22% between 2006 and 2010 (see **Figure 29**). This sector accounts for about 1.7% of the county's annual GDP. This cluster now primarily serves sub-regional markets with about 35 percent of its sales from customers located outside the region.

**Clackamas County Economic Landscape Update****III.B.8. Food & Beverage Processing**

Food and beverage processing is a key cluster in Clackamas County. Establishments within this cluster range in size from small independents to large international practices. This cluster now derives the majority of its sales from customers outside Clackamas County, and includes 7 of the County's Top 100 private employers.

<b>Representative Food &amp; Beverage Mfg. Businesses</b>	
<b>Name</b>	<b>Location</b>
AG Specialty Foods Inc.	Gladstone
BCI Coca Cola Bottling Co. *	Wilsonville
Bob's Red Mill Natural Foods *	Milwaukie
Ever Fresh Fruit Company *	Boring
Fred Meyer Inc. *	Clackamas
Integrated Bakery Resources*	Lake Oswego
Interstate Meat Distributors *	Clackamas
S.A. Piazza & Associates LLC	Clackamas
Safeway Stores, Inc. *	Clackamas
Saint Honore Bakery LLC	Lake Oswego

Source: Oregon Employment Department; FCS GROUP

\* Indicates top 100 County Business Listing

**Food & Beverage Processing Cluster  
Current Stats for Clackamas County**

**Annual GDP** (Value Added): \$139 Million

**Cluster Share of County GDP:** 0.9%

**Exports/Sales from Outside MSA:** 35%

**Direct Employment:** 1,309 jobs

**County Businesses:** 50

**Number of Businesses in Top 100:** 7

**10-year Job Growth Forecast:** 5%

**Cluster Location Quotient (LQ)\*:** 0.8

Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; and 10-year growth forecast by Oregon Employment Department.

\* Please refer to definition of LQ on next page.

**Food and Beverage Processing  
North American Industrial Classification System  
(NAICS) Categories**

**311: Food processing and manufacturing.** Such as milling, baking and refining raw food products. These processes produce food and other edible items such as coffee and seasoning.

**312: Beverage manufacturing.** Such as bottling, producing, fermenting and distilling beverages. This includes breweries, wineries, bottling plants and liquor distilleries

Figure 29 Location Quotient Trends: Food &amp; Beverage Processing

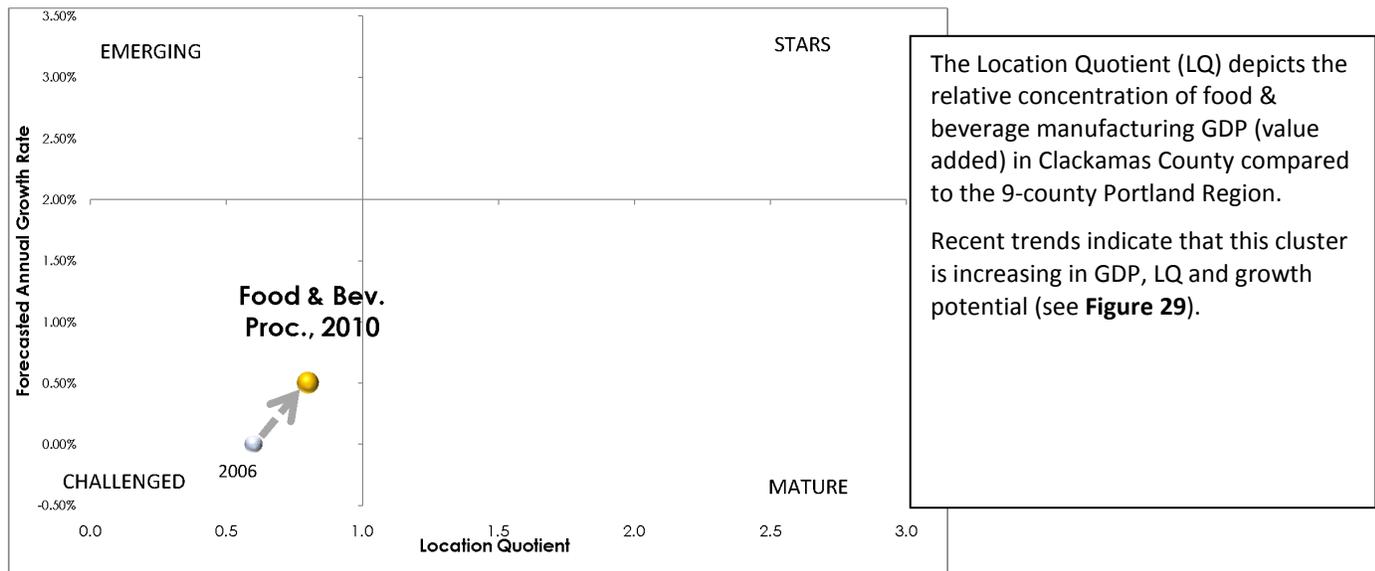


Figure 30 Food &amp; Beverage Processing Economic Impacts, Clackamas County, 2009 and 2010

		2009	2010
Industry Location Quotient		0.63	0.80
Contribution to GDP		0.7%	0.6%
# of Businesses		56	50
Average Compensation		\$51,995	\$55,985
Labor Income		\$69,847,874	\$73,285,000
Total GDP (Value Added)		\$107,827,748	\$134,988,000
% Traded Outside Region		n/a	35%
Output		\$597,403,584	\$677,257,000
Direct Jobs		1,343	1,309
Secondary Jobs		1,314	856
Total Employment		2,657	4,320

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available  
Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the food and beverage manufacturing cluster continues to improve. As indicated in Figure 30, the average compensation in this cluster is well above the county-wide average for all jobs, total GDP (valued added) increased by 25% between 2009 and 2010. However, direct employment decreased by 3% during the same time period. This cluster currently accounts for only 1% of the county's annual GDP, but derives 35% of its sales from customers located outside the region (domestic and foreign trade). This cluster should continue to experience positive growth as overall economic conditions improve nationally and internationally.

**Clackamas County Economic Landscape Update****III.B.9. Wood Product Manufacturing**

The wood product manufacturing cluster has deep roots in Clackamas County, and is still one of the *top 10 traded clusters*. The presence of the Mt. Hood National Forest provides a resource of timber that has traditionally fed local wood mills in rural cities, such as Estacada and Molalla. Locally produced wood products in Clackamas County include lumber, plywood, wood trusses, cabinets and pallets.

This cluster is reeling from the recent economic recession and housing industry downturn. On the bright side, exports of wood products from Oregon jumped 53% between 2009 and 2010, with the total value of wood exports exceeding \$220 million. Also the total number of Clackamas County businesses within this cluster expanded from 30 to 34 between 2008 and 2010.

**Wood Products Manufacturing Cluster  
Current Stats for Clackamas County\*****Annual GDP (Value Added):** \$47 M**Cluster Share of County GDP:** 0.3%**Exports/Sales from Outside Region:** 56%**Direct Employment:** 777 jobs**County Businesses:** 26**Number of Businesses in Top 100:** 0**10-year Job Growth Forecast:** 18%**Cluster Location Quotient (LQ)\*:** 1.12

*Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; and 10-year job forecast from Oregon Employment Department.*

*\* Please refer to definition of LQ on next page.*

Representative Wood Products Businesses	
Name	Location
Brentwood Corp.	Molalla
Sanders Wood Products Inc.	Molalla
Interfor Pacific Inc	Molalla
Precision Roof Trusses', Inc.	Clackamas
Classic Manufacturing NW LLC	Wilsonville
Summit Woodworking Inc.	Oregon City
Lazy s Lumber, Inc.	Beavercreek
Pacific Lumber Company	Lake Oswego
Savannah Pacific Molalla LLC	Molalla
McGriff Lumber Co.	Boring

*Source: Oregon Employment Department; FCS GROUP*

*\* Indicates top 100 County Business Listing*

**Wood Product Manufacturing Sector  
North American Industrial Classification  
System (NAICS) Categories****3211: Sawmills and wood preservation****3212: Veneer, plywood and engineered wood products****3219: Other wood product manufacturing,** such as millwork, flooring, trusses, cabinets, containers and ballets.

Includes businesses primarily engaged in the manufacturing of wood products, such as lumber, plywood, veneers, wood containers, flooring, trusses and prefabricated wood buildings.

## Clackamas County Economic Landscape Update

Figure 31 Location Quotient Trends: Wood Product Manufacturing

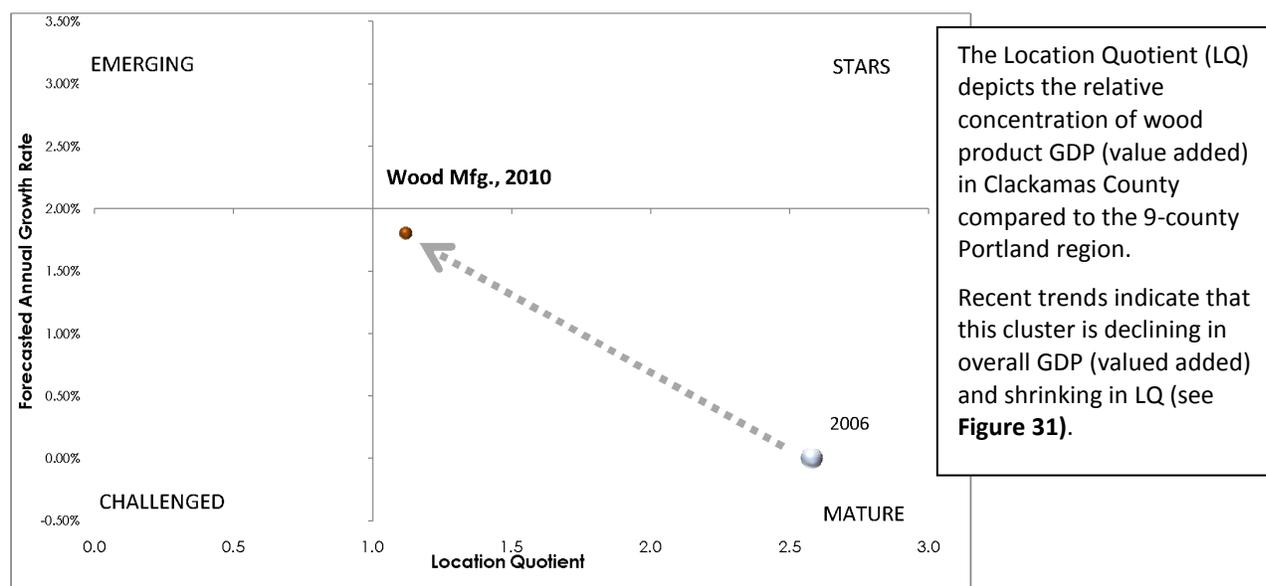


Figure 32 Wood Product Manufacturing Economic Impacts, Clackamas County, 2006, 2009 and 2010

	2006	2009	2010
Industry Location Quotient	2.58	1.16	1.12
Contribution to GDP	0.8%	0.4%	0.3%
# of Businesses	30	34	26
Average Compensation	\$41,000	\$34,000	\$51,480
Labor Income	\$60,242,000	\$32,318,000	\$40,000,000
Total GDP (Value Added)	\$151,722,000	\$63,051,000	\$46,900,000
% Traded Outside Region	n/a	n/a	56%
Output	n/a	\$186,564,000	\$150,000,000
Direct Jobs	1,469	940	777
Secondary Jobs	1,732	506	517
Total Employment	3,201	1,446	1,294

\* GDP = Gross Domestic Product or Total Value Added. N/A = not available  
Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the wood product manufacturing cluster is mixed. As indicated in Figure 32, the average compensation in this cluster is starting to increase but total GDP (valued added) decreased by 69% and direct employment fell by 47% between 2006 and 2010. This sector accounts for about 0.3% of the county's annual GDP, and derives over half of its sales from customers located outside the region (domestic and foreign trade). Until national and regional economic conditions (particularly in the home building industry) improve this cluster may continue to decline.

**Clackamas County Economic Landscape Update****III.B.10. Agriculture & Food Production**

There is a growing trend towards buying locally produced food and organic products for all types. According to the U.S. Bureau of Labor Statistics people spend approximately 10% of their gross earnings on food, and this level of spending amounts to nearly \$1.9 billion in Clackamas County and \$7.5 billion in the nine-county Portland MSA region every year. In addition, there is a significant level of food purchased by businesses, such as food processors, breweries, and restaurants. While this cluster represents only 2% (\$99 million) of the annual GDP produced by Clackamas County, the actual value of this cluster to the local and regional economy is much greater than that amount. In the book *You Can't Eat GDP, Economics as if Ecology Matters*, author Eric Davidson points out that existing GDP is not a good indicator for measuring the value of agriculture and food production. Special environmental considerations about where and how food is obtained are probably more important to air, water, and land resources. A supplemental analysis by FCS GROUP indicates that increasing local purchases by 20% could generate about 105 jobs and induce regional GDP by \$44 million (with Clackamas County capturing 15–20% of this increase).

Representative Ag. & Food Production Businesses	
Name	Location
CALFARMS	Oregon City
EISELE Farms	Boring
Health Wright Products	Clackamas
Kip & Anna Tipikin	Molalla
Kirkman Group	Lake Oswego
Montecucco Farms	Canby
Rose Agri-Seed	Canby
Sandy Farms	Sandy
Willamette Egg Farms	Canby

Source: Oregon Employment Department; FCS GROUP

\* Indicates top 100 County Business Listing

**Agriculture & Food Production Cluster  
Current Stats for Clackamas County\***

**Annual GDP (Value Added):** \$99 M

**Cluster Share of County GDP:** 2%

**Exports/Sales from Outside MSA:** 45%

**Direct Employment:** 3,464 jobs

**County Businesses:** 135

**Number of Businesses in Top 100:** 0

**10-year Job Growth Forecast:** 31%

**Cluster Location Quotient (LQ)\*:** 1.39

Source: compiled by FCS GROUP based on IMPLAN (2010), adjusted to 2011 dollars; and 10-year job forecast from Oregon Employment Department.

\* Please refer to definition of LQ on next page.

**Agriculture & Food Production Cluster  
North American Industrial Classification  
System (NAICS) Categories**

**111: Farming and food production (excluding 1114 nurseries and greenhouses)**

**112: Animal production, egg production, ranching**

**114: Fishing, hunting and trapping**

**115: Support activities for agriculture & forestry**

**3253: Fertilizer and pesticide manufacturing**

**3254: Medicinal and botanical manufacturing**

Figure 33 Location Quotient Trends: Agriculture and Food Production

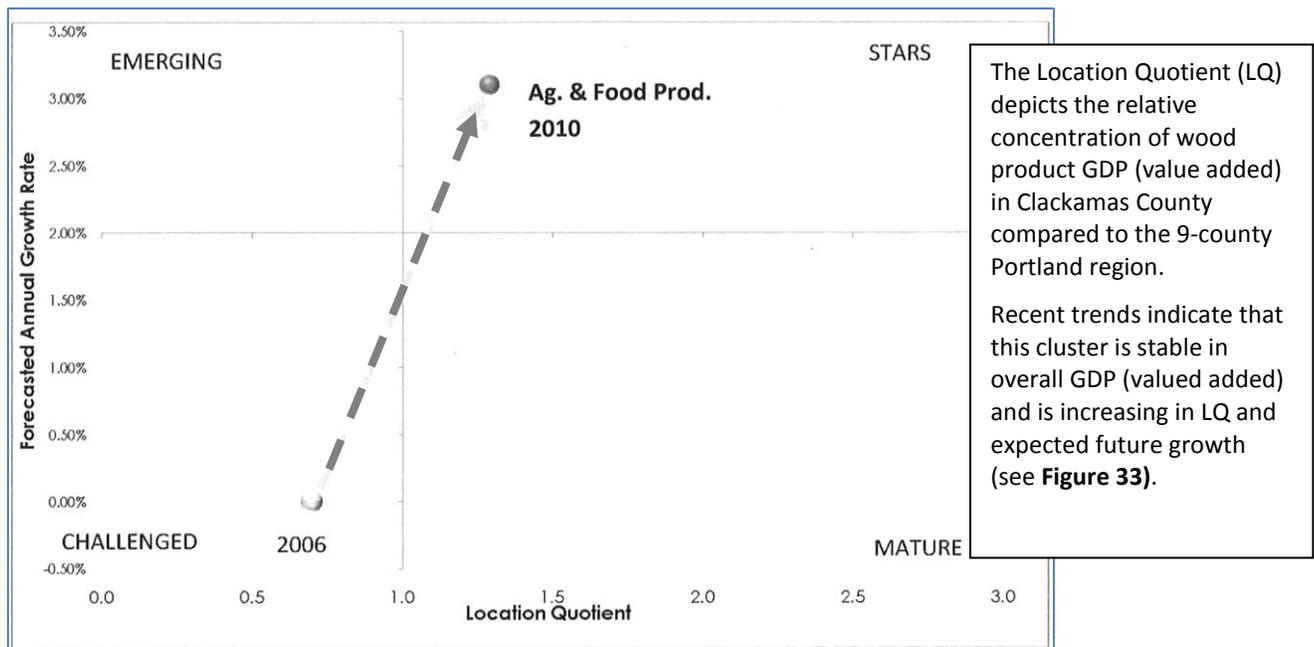


Figure 34 Agriculture and Food Production Economic Impacts, Clackamas County, 2010

			2010
Industry Location Quotient			1.39
Contribution to GDP			0.6%
# of Businesses			135
Average Compensation			\$19,397
Labor Income			\$67,190,000
Total GDP (Value Added)			\$99,080,000
% Traded Outside Region			6%
Output			\$258,620,000
Direct Jobs			3,464
Secondary Jobs			856
Total Employment			4,320

\* GDP = Gross Domestic Product or Total Value Added. Note, data for years prior to 2010 has not been analyzed. Source: IMPLAN model data, adjusted to 2011 dollars by FCS GROUP.

The future outlook for the agriculture and food production cluster is rapidly improving. While the average compensation in this cluster is well below the county-wide average for all jobs, the future growth potential is very positive. This cluster derives nearly half of its sales from customers located outside the region (domestic and foreign trade). As the trend towards “buying local” increases, this cluster should continue to improve.

### III.C. REGIONAL CLUSTER MARKETING EFFORTS

Focused marketing and business recruitment efforts are being made by the State of Oregon, Portland Business Alliance, and local economic development officials to attract certain established and emerging business clusters. The business and industry clusters currently targeted by the Oregon Business Development Department, Portland Business Alliance, and the Portland Development Commission include advanced manufacturing; clean technology (with sustainability sub-clusters in green building, solar, and wind power); active wear/outdoor gear; and software.

According to the Oregon Employment Department, the job sectors with the highest potential for new growth in the greater Portland region include: health care; hotel/motel accommodations and food services; business administration and waste management; professional; scientific and technical service (such as computer science and engineering); state and local government; wholesale trade; finance and insurance; retail trade; transportation; and utilities (includes warehousing, distribution and energy research, and private utilities).<sup>6</sup>

The manufacturing sectors with the greatest net new job growth potential in the greater Portland metropolitan region include: computer-related parts manufacturing; transportation equipment; other miscellaneous durable goods (such as solar panels); and miscellaneous non-durable goods (such as apparel research and design). Health-related medical devices and biomedical research, and organic food and beverage processing are also growing business sectors within the broader economy.

Clackamas County is well positioned to attract business investment in manufacturing, clean-technology and health-related medical research and service sectors. Efforts to retain existing employers, accommodate emerging small businesses, and attract new businesses are equally important. To optimize business investment potential, Clackamas County should evaluate its perceived advantages and disadvantages vis-à-vis the factors used for business location decision, as identified below.

### III.D. BUSINESS LOCATION CRITERIA

Supporting research on business location decisions is quite extensive and findings tend to vary by type of industry, market orientation, establishment size, and other factors. Research by professors Fahri Karakaya (University of Massachusetts) and Cem Canel (University of North Carolina) published in 1998 included a survey of 84 firms which was completed by a chief executive officer. The firms included a mix of small, medium and large service and

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<sup>6</sup> *These emerging business clusters are documented in the regional WIRED (Workforce Innovation and Regional Economic Development, Global Development Strategy, prepared by FCS GROUP et.al, 2008.*

manufacturing industries. The business survey results indicate that the top 10 factors considered for business location decision making include:

1. Availability of skilled labor
2. Availability of transportation facilities
3. State tax rate
4. Proximity to major airports
5. State regulatory environment
6. Real estate tax rate
7. Proximity to major highways/seaports
8. Availability of local airport
9. Cost of utilities
10. Availability of unskilled labor

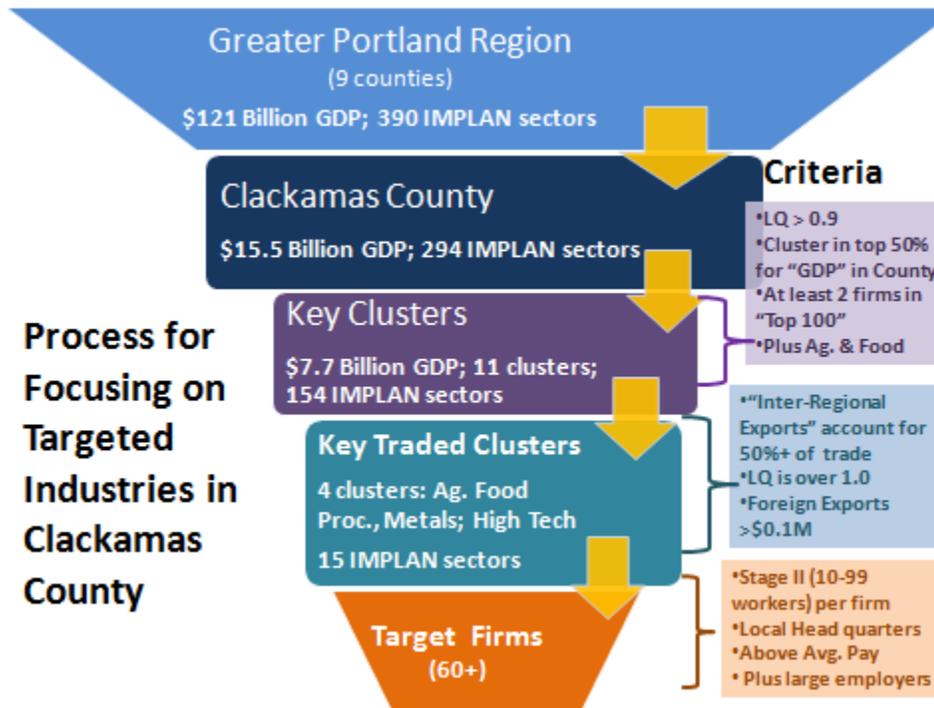
### III.E. TARGETED BUSINESS OUTREACH

FCS GROUP utilized the IMPLAN model to analyze 145 detailed sectors within the 10 key clusters to identify emerging sectors within key traded clusters. The process used for the analysis is illustrated in **Figure 35**. This process allows Clackamas County to “screen” each sector to determine businesses that most likely to grow a rate faster than average with measurable levels of GDP and employment growth over the next 5–10 years.

Specific target sectors (within Clusters) were identified that met at least 6 of 7 criteria, including:

- Generated at least \$10 million in annual economic output within the sector;
- GDP (value added) per employee above County average (\$71,000+ /job)
- Foreign exports over \$0.1 million
- Industry location quotient greater than 1.0
- Commodity location quotient greater than 1.0
- Inter-regional exports/sales greater than 50% of total output
- Negative value (net outflow) of commodity demand from Clackamas County (this indicates more demand than supply of a particular commodity)

Figure 35 Process for Identifying Targeted Sector and Businesses



Approximately 15 detailed IMPLAN sectors met 6 or 7 of the above mentioned criteria. Those sectors were found in four key clusters, including:

#### Agriculture and Food Production

- Fertilizer manufacturing
- Pesticide and other agricultural chemical manufacturing

#### Food and Beverage Processing

- Dog and cat food processing
- Other animal food processing
- Snack food manufacturing

#### Advanced Manufacturing – Metals and Machinery

- Metal cutlery, utensils, pot and pan manufacturing
  - Handtool manufacturing
  - Metal tank manufacturing (i.e., vats for hops and grains)
- Metal coating, engraving and heat treating

#### Advanced Technology – High Tech

## Clackamas County Economic Landscape Update

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- Computer terminals and peripheral equipment manufacturing
- Audio and video equipment manufacturing\*
- Magnetic and optical recording media manufacturing\*
- Storage battery manufacturing
- Communications and energy wire cable manufacturing\*<sup>7</sup>

Clackamas County businesses within these 14 sectors were then screened using the Oregon Employment Department data base to identify specific businesses that met the following criteria:

- Stage II employment levels (10 to 99 workers) with local Clackamas County head quarters and above average annual pay rates.

Approximately 60 businesses within the 14 emerging sectors met these criteria. It is very likely that those businesses will experience significant growth over the next 5–10 years and it is recommended that Clackamas County staff conduct interviews with their representatives to ensure that their growth needs can be met, particularly as it relates to the key business location criteria listed in Section III.D.

It is also recommended that the County's larger Stage IV businesses (500+ employees) also be contacted to ensure that their site expansion needs and other key factors are being addressed locally or regionally.

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<sup>7</sup> \*Note, these sectors may also be reflected within the emerging film industry cluster in Clackamas County.

## IV Development Overview

This section provides a summary of the major public and private development investments underway or recently completed in Clackamas County. While this is not to be considered a complete listing of all projects and investment activities, it is intended to represent the level of major investment activity that is occurring throughout the county. Please refer to **Figures 36 and 37** for a list and location of major public, private and public/private investment projects in Clackamas County.

### IV.A. PUBLIC INVESTMENTS

Clackamas County is partnering with ODOT, Trimet and local cities to complete major transportation, parks and infrastructure facilities investments. Major recent and on-going construction projects include:

- MAX Orange Line – Light Rail Transit (Portland to Milwaukie)
- 172<sup>nd</sup> Ave. roadway improvements (Happy Valley)
- Lawnfield Road and Mather Road improvements (Clackamas Industrial Area)
- Tolbert Bridge (Clackamas Industrial Area)
- Sunrise Corridor Phase 1 Construction (I-205 to 122<sup>nd</sup> Avenue)
- Tri Cities sewer system capacity upgrades (serving Oregon City, West Linn, Gladstone, and other areas)
- Stafford-Borland Roundabout (north of I-205 in Stafford area)
- Monterey “Main Street” improvements (North Clackamas area)
- Oregon City Bridge renovation (Oregon City)
- Highway 224 improvements (ODOT led project included new pavement, streetlights, medians, intersections and landscaping)
- I-5/Wilsonville Road interchange

Other major institutional construction activities in Clackamas County include over \$75 million in federal and local government investment at Camp Withycomb. Also, the Oregon Institute of Technology has relocated into a 2,000 student college campus in Wilsonville..

### IV.B. PUBLIC/PRIVATE INVESTMENTS

Local cities and special districts are working with property owners to complete several public/private developments. Selected activities include:

## Clackamas County Economic Landscape Update

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- Rock Creek Employment Center (planned 200-acre employment area in Happy Valley expected to attract 2,000 to 3,000 new jobs at buildout)
- Foothills Redevelopment (planned transit oriented redevelopment near downtown Lake Oswego with a \$1.1 million design plan underway)
- North Clackamas Urban Renewal Area (sewer upgrades and connections being completed using federal grants, local urban renewal and private investment)
- Blue Heron Site (historic brownfield site in downtown Oregon City now being considered for a variety of public and private uses)
- Estacada Industrial expansion (city has added 130 acres of industrial zoned land to its UGB in 2011, targeted for large users)

In 2011, Clackamas County created a Strategic Investment Zone (SIZ) and Rural Renewable Energy Development Zone (RRED). These programs are valuable business recruitment tools to attract new businesses, create jobs and increase investment in Clackamas County.

### IV.C. PRIVATE INVESTMENTS

Despite the weak economy, several major private developments are moving forward in Clackamas County. Selected private developments include:

- Lake Grove developments (major reconstruction of the former Wizer grocery store and shopping center is now underway, along new office buildings, and senior housing developments along Boones Ferry Road)
- Villebois neighborhood (private construction continues with new homes being added each month at this \$400 million, 2,800 unit planned development in Wilsonville)
- Fred Meyer Center (new 145,000 sf commercial center to open this summer)
- Shimadzu expansion (\$5 million factor expansion completed in Canby adding 54,000 sf of industrial floor area)
- Oregon Iron Works expansion (\$40 million plant expansion underway in Clackamas Industrial Area) to make room for the first modern streetcar built in the United States in 60 years. The streetcar project is projected to create 50 to 100 jobs.
- Coca Cola Plant expansion (new 150,000 bottling and distribution plant in Wilsonville)
- Rockwell Collins expansion (private expansion in Wilsonville with 150 jobs added this year)
- OECO expanded their operation in Milwaukie to include the Pacific Scientific Electro Kinetics Division formerly located in California. OECO is a leading manufacturer of highly specialized alternator and generator systems and associated electronics and has supplied hardware for military and commercial programs. The expansion has the potential of adding 100 new employees to the Milwaukie facility.

**Clackamas County Economic Landscape Update**

- Pacific Natural Foods signed a long term lease in Wilsonville for a 302,765 square feet facility.

**Figure 36 Major Public and Private Investments in Clackamas County**

Map ID #	Project Title	General Location	Notes
1	MAX Orange Line - Light Rail Transit (LRT)	Portland to Milwaukie	LRT line will open in 2015, running from Portland State University to Milwaukie and Oak Grove; cost \$1.5 Billion,
2	172nd Improvements	Happy Valley	New roadway and intersection improvements; cost \$30 Million
3	Lawnfield & Mather Roads	Clackamas Industrial Area	Connection will provide some connectivity between Hwy 212 and I-5
4	Tolbert Bridge	Clackamas Industrial Area	New bridge improvement
5	Sunrise Corridor Phase 1 (I-205-122nd)	Clackamas Industrial Area	Phase 1 underway; cost \$151 Million with \$100 Million federal funding
6	Camp Withycombe Military Base Realignment	Clackamas	Consolidates military installations in the Portland area into one large installation; cost \$72.4 million (federal government) with a \$2.99 Million local match
7	Tri Cities Sewer Upgrade	Clackamas River	Clackamas Water Env. Services completing new waste water processing facility and new main; serves Oregon City, West Linn, Gladstone and other customers
8	Stafford-Borland Roundabout	Stafford Triangle	New 2-land roundable completed in 2010; cost \$4 Million
9	Monterey "Main street" Improvements	North Clackamas	Improved streetscape, traffic light and widening; cost \$8 Million
10	Oregon City Bridge repairs	Oregon City	Historic bridge renovation; cost \$10.6 million
11	Oregon Institute of Technology, Wilsonville Campus	Wilsonville	Will utilize 141,000 SF building for an expected 2,000 student campus; consolidates 4 Portland area campus locations
12	Rock Creek Employment Center	Happy Valley	New employment area with over 200 acres; expected to attract 2-3,000 jobs
13	Foothills Redevelopment	Lake Oswego	Potential new transit oriented development; \$1.1 million design plan now underway
14	North Clackamas Urban Renewal District (sewer upgrade)	North Clackamas	Area wide sewer conversion underway
15	Blue Heron Opportunity Site	Oregon City	Potential brownfield redevelopment site in downtown Oregon City

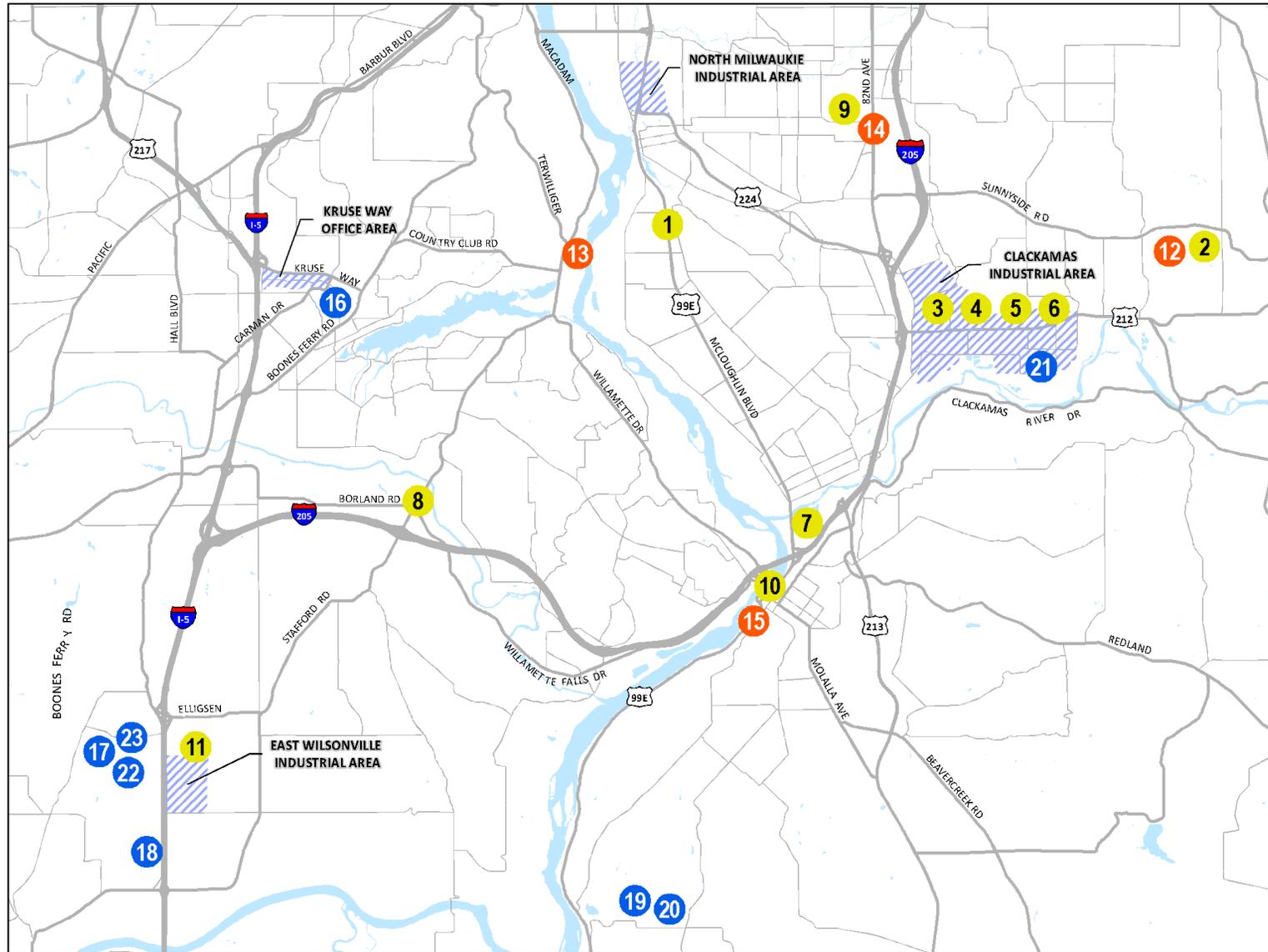
Figure 36 (continued)

Map ID #	Project Title	General Location	Notes
16	Lake Grove Developments	Lake Oswego	Lake Grove Shopping center renovation, senior housing and office building projects completed or underway
17	Villebois Neighborhood	Wilsonville	580 acres of land, 2,800 planned dwellings; cost \$400 Million
18	Fred Meyer Center	Wilsonville	145,000 SF of commercial space, scheduled to open in July 2011
19	Shimadzu Expansion	Canby	\$5 million expansion to factory will add 54,000 SF to existing plant
20	American Steel Expansion	Canby	
21	Oregon Iron Works Expansion	Clackamas Industrial Area	Plant expansion; cost \$40 million
22	Coca Cola Plant Expansion	Wilsonville	150,000 SF expansion helped to add 12 jobs and consolidate four regional facilities into one
23	Rockwell Collins Expansion	Wilsonville	Added 150 jobs into Wilsonville location
24	Estacada Hwy. 224 Improvement	Estacada	Resurface road, streetlighting, medians, cost \$1.5 million
25	Estacada industrial site UGB	Estacada	City added 130 acres to UGB in 2011

## Legend:

	public/private development
	public development
	private development

Figure 37 Major public and private investments completed or underway in Clackamas County



## V Employment Centers Analysis

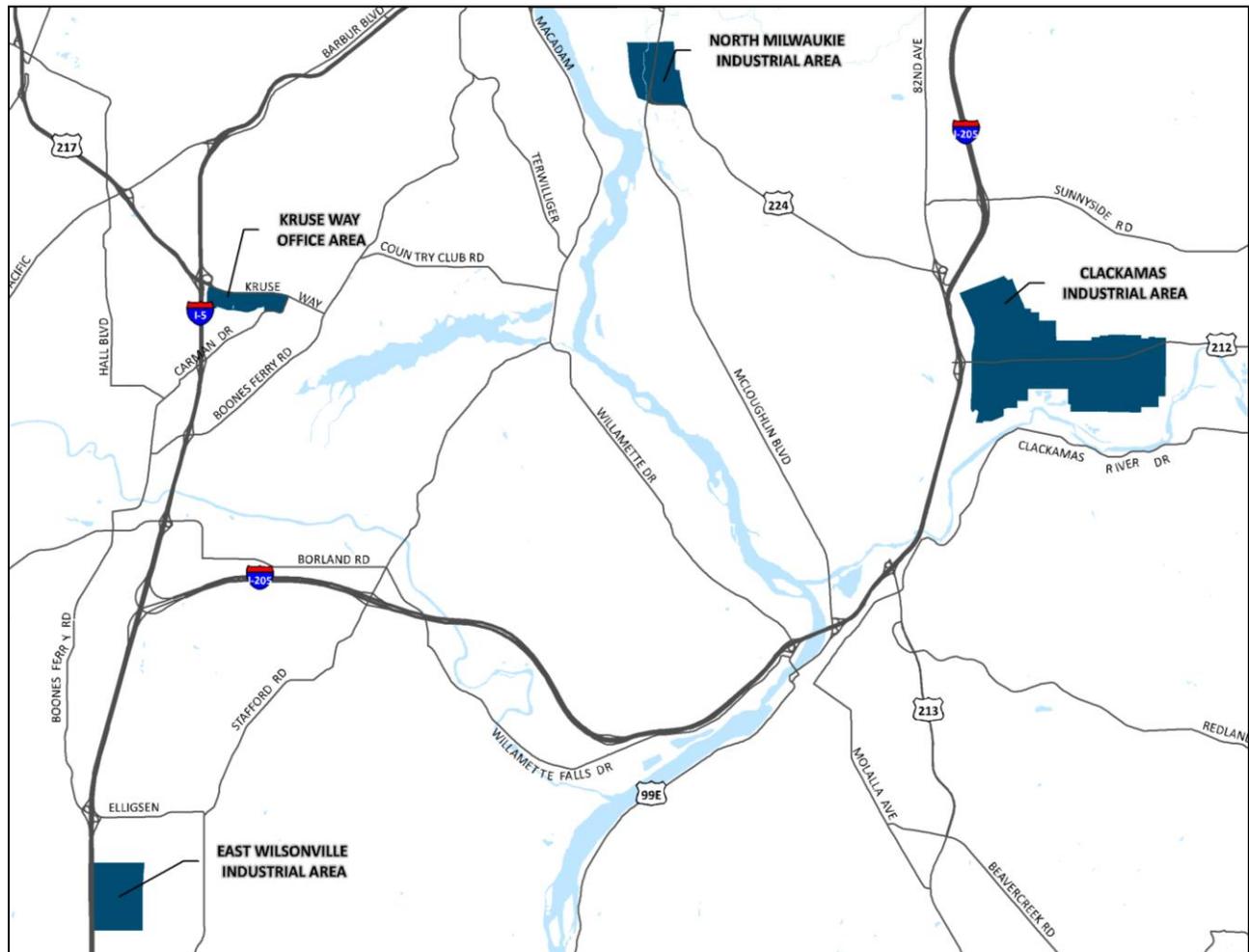
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This section provides a summary comparison of the economic benefit derived from four major employment centers in Clackamas County.

To better understand the economic and fiscal benefit of land use planning policies for employment areas, an evaluation of four established employment centers was conducted.

The four employment areas are shown in **Figure 38** and included:

- **North Milwaukie Industrial Area** - vintage 1960 to 1970 industrial park location, created before I-205 was constructed.
- **Clackamas Industrial Area** - planned industrial area that was developed primarily in the 1980s and 1990s after I-205 was constructed; additional investment in the early 2000s.
- **East Wilsonville Industrial Area** - a planned industrial campus and R&D area that includes high tech corporate campuses for firms such as Xerox. Development occurred primarily in the 1990s and 2000s.
- **Kruse Way Area** - a planned office corridor that was developed primarily in the 1990s and 2000s.

**Figure 38 Employment Area Locations**

The relative economic and fiscal benefits for each of these employment centers are summarized in **Figure 39**. The key highlights include:

- Total direct value added per acre ranged from \$718,000/acre in the North Milwaukie Industrial Area to \$7.9M/acre (Kruse Way).
- Current average job density per acre in 2010 is estimated to range from 6.8 jobs per acre in the North Milwaukie Industrial Area to 44 jobs per acre in Kruse Way. Average job density in 2006 ranged from 2.7 in North Milwaukie to 6.0 in Clackamas Industrial Area to 7.3 in E. Wilsonville to 34.1 jobs per acre in Kruse Way.
- Average “covered” wages per job in 2010 ranged from \$43,642 in the Clackamas Industrial Area to \$93,455 in East Wilsonville.
- Assessed value per acre ranged from \$663,000/acre (N. Milwaukie) to \$3.1/acre (Kruse Way).

Figure 39 Comparison of Employment Areas

	Clackamas Industrial Area	E. Wilsonville	Kruse Way	North Milwaukie
"Covered" Jobs in Location	10,116	3,540	3,822	1,169
Value Added	\$ 1,121,330,273	\$ 499,928,016	\$ 685,108,271	\$122,758,461
Output (direct)	\$ 1,972,376,330	\$ 1,123,214,786	\$ 1,105,095,216	\$201,858,353
Regional Output (direct & secondary)	\$ 2,685,179,435	\$ 1,642,660,371	\$ 1,597,356,924	\$272,206,459
Developed Acres (net acres)	1,056	240	86	171
Jobs Per Developed Acre	9.6	14.8	44.4	6.8
Assessed Value Per Developed Acre	\$ 663,430	\$ 788,354	\$ 3,060,314	\$ 587,404
Value Added Per Developed Acre	\$ 1,061,866	\$ 2,083,033	\$ 7,966,375	\$ 717,886
Output Per Developed Acre (direct)	\$ 1,867,781	\$ 4,680,062	\$ 12,849,944	\$ 1,180,458
Regional Output Per Developed Acre (direct & secondary)	\$ 2,542,784	\$ 6,844,418	\$ 18,573,918	\$ 1,591,851
Direct Covered Wages Per Job (2010)	\$ 43,642	\$ 93,455	\$ 84,394	\$ 47,468
Value Added Per Job (covered)	\$ 110,847	\$ 141,223	\$ 179,254	\$ 105,012
Output Per Job (direct)	\$ 194,976	\$ 317,292	\$ 289,141	\$ 172,676
Regional Output Per Job (direct & secondary)	\$ 265,439	\$ 464,028	\$ 417,937	\$ 232,854

Source: analysis by FCS GROUP and Real Urban Geographics based on 2010 employment and payroll data, and Jan. 2012 assessed value levels; and IMPLAN model multiplier assumptions.

## VI Summary and Policy Discussion

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### VI.A. SUMMARY OF FINDINGS

This Clackamas Economic Landscape Update reflects the significant economic changes that have occurred over the past few years, as the local and regional economy slowly emerge from the “Great Recession” and reflect changing national and international economic conditions. The findings indicate that modest positive growth in Clackamas County gross domestic product (GDP) did occur over the 2006–2010 timeframe, as the county GDP increased to \$15.5 billion (expressed in 2011 dollars).

During the 2006 to 2010 time frame the County growth in GDP did slightly outpace the nine-county region. However, average earnings within Clackamas County continue to lag significantly below the regional average. Continued efforts to spur business investment within the key clusters are expected to enhance growth average earnings and GDP within the County.

Certain clusters are performing better than others in Clackamas County. Among the key clusters, there are several sectors within the Agriculture and Food Production, Food and Beverage Processing, Advanced Manufacturing– Metals and Machinery, and Advanced Technology–High Tech clusters that show significant growth potential over the next 5–10 years.

A focused business outreach effort aimed at Stage II (9–100 workers) businesses within key growth industry sectors is recommended. Clackamas County has a very large proportion of small and self-employed establishments, and “home based” business enterprises. The targeted Stage II companies could include several “gazelle” firms that are expected to grow significantly over the next few years.

Marketing efforts aimed at spurring local purchases of agriculture and food could also have measurable impacts on GDP and job growth within Clackamas County and the region.

A more focused cluster development strategy may be required for Clackamas County to fully capitalize on the emerging film and media production cluster.

Focused employment growth in new emerging locations, such Rock Creek Employment Center in Happy Valley, Estacada, Molalla, Canby and Oregon City may represent the best remaining future industrial job growth areas within the county over the coming decades.

## VI.B. POLICY CONSIDERATIONS

Clackamas County should continue to involve business owners to consider the relative advantages and weaknesses with regard to the top 10 business location decision factors, described previously, and to understand opportunities for enhancing local supply chains. Particular attention should be focused on understanding workforce training needs and issues associated with business expansion requirements.

Steps should be taken to assure that the county has adequately addressed these and other issues, particularly as they apply to the key clusters within the targeted business sectors.

Given the importance of transportation facilities in business location decisions, efforts to improve transit, highway and bicycle/pedestrian access should continue. National and foreign trade brings in dollars that support and sustain the local and regional economy. Clackamas County staff should continue to work with state and regional entities, and businesses to encourage expansion of goods and services for export. In 2010, private businesses in Clackamas County's key clusters added nearly \$3 billion to the county/regional GDP (export trade outside the nine-county region) in 2010, as indicated in Figure 40.

**Figure 40. Estimated Annual Value of Exports: Clackamas County Clusters, 2010**

Cluster Name	Exports (share of trade derived from outside 9-county region)	Value of Exports (Annual GDP Impact)	Rank
Wholesale Trade	45%	\$735 M	1
High Tech	74%	\$697 M	2
Advanced Mfg. - Metals	77%	\$448 M	3
Prof. & Business Services	8%	\$204 M	4
Nurseries & Greenhouses	83%	\$98 M	5
Transportation & Distribution	35%	\$96 M	6
Film & Media Production	43%	\$91M	7
Food & Bev. Processing	35%	\$49 M	8
Ag.& Food Production	45%	\$45 M	9
Wood Product Mfg.	56%	\$26 M	10

Source: analysis by FCS GROUP based on 2010 IMPLAN data for Clackamas County.

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## Appendix A – Glossary

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### **Assessed Value (AV)**

The AV is the amount of estimated taxable valuation of land and improvements on a taxable parcel; often obtained by the county assessor.

### **BEA**

Bureau of Economic Analysis is the economic analysis division contained within the U.S. Department of Commerce.

### **Covered Employment**

The total number of jobs reported to the Oregon Employment Department at public, private and non-profit establishments for unemployment insurance compensation accounting purposes.

### **Direct (Primary) Effects**

The direct economic activity (employment, labor income, value added, output) per change in final demand specified for a given sector. Sometimes referred to by economists as first round impacts attributed to changes in investment or spending within a local economy.

### **Earnings Multipliers**

Input-output ratios that measure earnings paid to households by employment throughout the economy, directly and indirectly, in connection with delivery of \$1 million of final demand for a specific commodity.

### **Economic Census**

Economic census provides a detailed portrait of the nation's economy once every 5 years, from the national to the local level. The basic statistics collected cover nearly all of the U.S. economy except agriculture and government, which are covered by concurrent economic censuses. Several related programs collect additional statistics, including those on minority- and women-owned businesses. The economic census is conducted largely by the Census Bureau; the census of agriculture is conducted by the U.S. Department of Agriculture. The economic census for 1997 compiled and published data primarily on a NAICS basis for the first time.

**Economic Output**

Economic output represents the value of industry production. In IMPLAN, these are annual production estimates for the year of the data set and are in producer prices. For manufacturers this would be sales plus/minus change in inventory. For service sectors, production equals sales. For retail and wholesale trade, output equals gross margin and not gross sales. Indirect and induced economic output is derived from the I-O total requirements tables, the output multipliers show the amount of output required to satisfy a given level of final-use expenditures. For the commodity-by-commodity total requirements table, it is the production required both directly and indirectly of the commodity at the beginning of each row per dollar of delivery to final use of the commodity at the top of the column. For the industry-by-commodity total requirements table, it is the industry output required to deliver a dollar of a commodity to final users. For the industry-by-industry total requirements table, it is the industry output required to deliver a dollar of industry output to final users.

**Economic Production**

Economic production is an activity carried out under the control and responsibility of an institutional unit that uses inputs of labor, capital, and goods and services to produce outputs of goods or services.

**Employee or Employment**

An employee is a person who enters an agreement, which may be formal or informal, with an enterprise to work for the enterprise in return for remuneration in cash or in kind.

**Employee Compensation**

Employee compensation in IMPLAN is the total payroll cost of the employee paid by the employer. This includes, wage and salary, all benefits (e.g., health, retirement, etc) and employer paid payroll taxes (e.g., employer side of social security, unemployment taxes, etc).

**Establishment**

An economic unit—business or industrial—at a single physical location where business is conducted or where services or industrial operations are performed. Examples include a factory, mill, store, hotel, movie theater, mine, farm, ranch, bank, railroad depot, airline terminal, sales office, warehouse, or central administrative office. One or more establishments make up an enterprise or a company. However, a single establishment may be comprised of subunits, departments, or divisions. In the industry classification systems—the establishment is the basic unit for collecting many types of economic information.

An establishment is an enterprise, or part of an enterprise, that is situated in a single location and in which only a single (non-ancillary) productive activity is carried out or in which the principal productive activity accounts for most of the value added.

**Exempt AV**

Exempt AV is the amount of estimated taxable valuation of land and improvements that is excluded in the calculation of total assessed value for a taxable parcel; often obtained by the county assessor.

**Gross Domestic Product (GDP)**

The difference between an industry's or an establishment's total output and the cost of its intermediate inputs. It equals gross output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). The IMPLAN model includes labor income, proprietor profits, business income and tax payments as measures of GDP. See also "value added."

**Households**

Residents of the study area. Final users of nondurable goods and services. One of several institutions in IMPLAN.

**IMPLAN**

An economic model published by the Minnesota IMPLAN Group, also known as the Impact Model for Planning. IMPLAN was originally developed in the 1970s for the U.S. Government for use in understanding the economic effects of various industry sectors on local and regional economies. IMPLAN version 3.0 software was utilized for this analysis.

**Indirect Business Taxes (IBT)**

Prior to the 2003 comprehensive National Income and Product Accounts (NIPA) revision, IBT was the name of one of the three components of value added. It consists of tax and nontax liabilities that are chargeable to business expenses when calculating profit-type incomes and of certain other business liabilities to government agencies that are treated like taxes. Thus, IBT includes taxes on sales, property, and production, but it excludes employer contributions for social insurance and taxes on income. As part of the NIPA revision, this component was modified and termed "taxes on production and imports less subsidies." The major differences between the two are attributable to the treatments of subsidies and non-taxes.

**Indirect Effects**

The indirect change in a measure of economic activity (employment, labor income, value added, output) per change in the amount of final demand specified for a given sector. Indirect ratios show the production required of an industry and of all other industries to meet that industry's initial demand for production.

**Induced Effects**

The induced change in a measure of economic activity (employment, labor income, value added, output) per change in the amount of final demand specified for a given sector, resulting from interaction of institutions – usually associated with the indirect effects of household spending.

**Input–Output Analysis**

A type of applied economic analysis that tracks the interdependence among various producing and consuming sectors of an economy. More particularly, it measures the relationship between a given set of demands for final goods and services and the inputs required to satisfy those demands.

**Labor Income**

All forms of employment income, including Employee Compensation (wages and benefits) and Proprietor Income.

**Location Quotient**

**Propensity of jobs to locate in Clackamas County in comparison to the entire Regional PMSA.**

**NAICS**

North American Industry Classification System. A system of industrial classification—developed and used by the United States, Canada, and Mexico—for grouping establishments by similarity of production process. Beginning with the 1997 economic census, NAICS has replaced the 1987 Standard Industrial Classifications as the primary industry classification system used for U.S. economic statistics. NAICS features more detailed classifications for the services industries and improved classifications for the high–tech industries. (See also “Economic Census”.)

**Proprietor Income**

Proprietor income consists of payments received by self–employed individuals and unincorporated business owners. This income also includes the capital consumption allowance.

**Real Market Value (RMV)**

Real market value is the estimated total market value of land and improvements on a taxable parcel; often obtained by the county assessor based on an appraised value or recorded sales transaction.

**Regional Purchase Coefficient**

A regional purchase coefficient (RPC) is the proportion of the total demand for a commodity by all users in the Study Area that is supplied by producers located within the Study Area. For example, if the RPC for the commodity 'fish' is 0.8, then 80 percent of the demand by local fish processors, fish wholesalers, and other fish consumers are met by local fish producers. Conversely, 20 percent of the demand for fish is satisfied by imports.

**Sector**

In the national economic accounts, the institutional units that make up the total economy: business, households and institutions, and general government. The sectors are generally the two-digit NAICS level—though manufacturing, retail, and transportation and warehousing span several two-digit codes.

**Total Impacts**

Total impacts equal the sum of the direct, indirect and induced impacts.

**Value Added**

The difference between an industry's, or an establishment's total output and the cost of its intermediate inputs. It equals gross output (sales or receipts and other operating income, plus inventory change) minus intermediate inputs (consumption of goods and services purchased from other industries or imported). Value added consists of compensation of employees, taxes on production and imports less subsidies (formerly indirect business taxes and nontax payments), and gross operating surplus (formerly "other value added"). Gross value added is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector; gross value added is the source from which the primary incomes of the SNA are generated and is therefore carried forward into the primary distribution of income account.

If you have any questions or comments about the Clackamas County Economic Landscape project, please contact:

Clackamas County Business & Economic Development Department

503-742-4329





<b>Subject:</b> WIA Policies - Certification of One Stop Operators	<b>Number:</b> WIA-08
	Page 1 of 14

**Effective Date:**  
November 14, 2002

## INTRODUCTION

As provided in the Workforce Investment Act of 1998, the Local Workforce Investment Board, The Workforce Investment Council of Clackamas County (WICCO) with agreement of the chief elected official, must designate and certify One-Stop Operators in each workforce region (local area). Certification will help ensure a consistent level of quality in the services provided in the local workforce investment area. Local Boards are charged with utilizing criteria and quality standards for the purpose of holding Operators accountable for the one-stop system or center(s) operations they oversee.

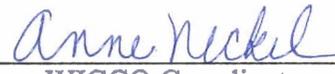
## BACKGROUND

Clackamas County strives to establish a quality-driven, comprehensive system of workforce development services, and access to services, that benefit all county residents who wish to take advantage of them. One way this can be accomplished is through a systemic approach in the development of one-stop operator quality standards and measures of excellence that can be flexibly applied by the county.

**ACTION:** The WICCO adopted the attached certification process for One Stop Centers, One Stop Operators, and affiliates on March 14, 2003.

Approved:

  
\_\_\_\_\_  
WICCO Board Chair

  
\_\_\_\_\_  
WICCO Coordinator



Subject: WIA Policies – Certification of One Stop Operators	Number: WIA-08
	Page 2 of 14

## One-Stop Service Delivery System Application for Site Certification

Application for certification by the Workforce Investment Council of Clackamas County as a:

- Comprehensive One Stop
- Affiliate One-Stop Center

Center Name: \_\_\_\_\_

Consortium Partners:


Consortium Contact Person:

Name: \_\_\_\_\_

Position: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

I certify I am authorized to submit this application on behalf of the above named consortium. If any information changes significantly, the WICCO will be notified. I certify that the contents of this document are true and correct.

Signature	Date	Title
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<b>Subject:</b>	WIA Policies - Certification of One Stop Operators	<b>Number:</b> WIA-08
		Page 3 of 14

**Effective Date:**  
November 14, 2002

### One-Stop Delivery System Goal

To deliver comprehensive workforce services through multi-agency collaboration and coordination while reducing redundancy and duplication

**Comprehensive One-Stop Center:** All mandatory partners provide services on-site through co-location. All Partner agency core services are provided on-site.

**Affiliate One-Stop Center:** All WIA core services provided on-site. All mandatory partners provide core services through on-site or referral. Minimum number of mandatory partners provide co-located services.

### Each prospective One-Stop Center must address the following questions:

How does the Center deliver comprehensive workforce services?

How does the Center engage multiple agencies in the provision of services?

How does the center support collaboration?

How does the Center reduce redundancy and duplication in services provided to customers?

How does the Center assess customer satisfaction and use the results to modify operations?

The narrative answers to the above questions will be submitted with the prospective Center's application and completed self-assessment criteria. Narrative is limited to two single spaced pages for each question.

#### Scoring:

**1=Not acceptable, Center cannot apply for certification**

**2=Does not meet standard without improvements**

**3=Meets the standard as stated**

**4=Exceeds the standard as stated**



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Site Reviewed: \_\_\_\_\_  
\_\_\_\_\_

Date of Review: \_\_\_\_\_

**Center Design & Layout**

**Criteria Standard:**

The comprehensive Center is designed to facilitate the easy use of equipment and technology, facilitate communications between customers and partner staff, and provide access to all center resources.

**Comments**

**Strategic Plan Goal**

<b>Initial Contact:</b>			
1	Does the Center have a well-marked and clearly identifiable entrance?		
2	Does the Center have visible and <i>center specific</i> signage & logo?		
3	Is adequate parking available?		
4	Is the center easily accessible for those with disabilities?		
5	Is the customer greeted in a warm and friendly manner?	this is subjective	
6	Does the first contact person provide quick and understandable information?	this is subjective	
7	Is the first contact person knowledgeable about all on-site programs and services?	how would this be measured?	
8	Is bi-lingual assistance available?		
9	Are the specific instructions or specialized equipment available for hearing/visually impaired clients?		
10	Is the initial information available in a number of formats (i.e., visual, audio, video, multiple languages)?		

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**Center Design & Layout**

**Comments**

**Strategic  
Plan Goal**

<b>Resource Room/Career Information Library:</b>		
11	Are there clear and simple instructions or signage to get to the Resource Room?	
12	Is the Resource Room located near the main entrance?	
13	Are staff available to answer questions in the Resource Room?	
14	Are staff assigned to the Resource Room on a regular schedule?	
15	Is a career information library located in or near the Resource Room	
16	Is there a schedule of workshops & other information clearly displayed?	
17	Is the center available for customer service (i.e., workshops, seminars, employer meetings) outside of regular business hours?	
18	Is space available for employers and counselors to conduct interviews?	
19	Are there current copies of required posters (EEO, minimum wage, workers compensation, etc.) in view?	

**Center Design & Layout Point Total**

Weight factor= x1

**TOTAL POINT VALUE FOR CENTER DESIGN & LAYOUT**

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**Customer Resources Standard:**

The Center contains adequate materials and information needed to provide comprehensive workforce services to customers with a minimum of duplication.	Comments	Strategic Plan Goal
1 Is the Resource room is well equipped with adequate computers, fax, telephones, tables, chairs, etc.		
2 Is there Internet access for customer use?		
3 May customers receive an on-site assessment of need?		
4 Is written information available to customers about partner programs and services?		
5 Do customers have access to all partner programs at the Center?		
6 Is the eligibility criteria for all partner programs available?		
7 Does the Center offer classes on basic computer skills?		
8 Does the customer receive orientations to the Workforce Network?		
9 Does the customer have access to labor market and job listings information including America's Job Bank?		
10 Are printed and/or audio materials on careers available at the Center?		
11 Does the customer have access to registrations for workshops or other types of classes?		
12 Is there access to America's Talent Bank?		
13 Is information available on local job candidate requirements?		
14 Are job vacancies posted (either on-line or written)?		
15 Are customers made aware of what services are available at the	redundant to question 5 and Center Design q.	



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Center?	

**Customer Resources Point Total**

Weight factor= x2 Maximum points=112

**TOTAL POINT VALUE FOR CUSTOMER RESOURCES**



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**Services provided on-site & with assistance**

**Item Points**

**Comments**

**Strategic Plan Goal**

**Standard:**

The center provides comprehensive workforce activities and services to customers with a minimum of duplication.

1	Outreach and recruitment activities			G5
2	Intake and priority of service determination or eligibility			G1
3	Referrals to Adult & Family Services for temporary Assistance to Needy Families (TANF) & other assistance on site			G5
4	Job search & employability skills training			G4
5	Unemployment compensation claims filing			n.a?
6	Financial aid determination			G5
7	Educational services (ESL, GED, etc.)			G5
8	Job search assistance and referrals to jobs including follow-up			G4
9	Job development			G3 & G4
10	Career assessment			G4
11	Career counseling & education planning			G4
12	Case management			G3
13	Referrals to child care by onsite worker			G5
14	Contracted work experience, internships & job shadowing			G4

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	<b>Services provided on-site &amp; with assistance</b>	<b>Item Points</b>	<b>Comments</b>
15	Specialized workshops for jobseekers & employers		G4
16	Ability to pay determination		G4
17	On-the-job training		G5
18	Customized training		G5
19	Referrals to occupational training		G4
20	Screening of job candidates		G4
21	Matching job orders to jobseekers		G4
22	Referrals of qualified job applicants		G4
23	Skills testing for employers		G3
24	Mass recruiting assistance		G1
25	Follow-up on job listings		G4
26	Rapid response for closings or layoffs		G4
27	Lay-off aversion & business retention services		G4
28	Assistance implementing economic development strategies		G1
29	Employer training on how to use The Workforce Network automated services		G1
30	Job Fairs		G5



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31	Skills assessment of incumbent workers			G4
32	Identified single point of contact for business services			G1

**Services Point Total**

Weight factor=  x3 Maximum points=384

**TOTAL POINT VALUE FOR SERVICES**

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**Partnership** *(All mandated partners are present)*

**Item  
Points**

**Comments**

**Strategic  
Plan Goal**

**Standard:**

The center will provide knowledgeable and experienced staff capable of meeting all customer needs. Center operations are designed to promote collaboration among partner agencies.

1	Mandated partners <i>provide services on-site</i>			G2 & G4
2	On-going efforts are made to increase collaboration			G2
3	The programs, services, staff and partner affiliations appear seamless to the customers			G2
4	A <i>signed</i> resource sharing agreement in place			G2
5	An <i>signed</i> MOU between partners in place and followed			G2
6	Common logo/name displayed & used by staff			G2

**Partnership Point Total**

Weight factor  x2 Maximum points=48

**TOTAL POINT VALUE FOR PARTNERSHIP**

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**Center Management & Operations**

**Item Points**

**Comments**

**Strategic Plan Goal**

**Standard:**

The center is managed to fully utilize available resources and promote continuous improvement based on customer satisfaction feedback

1	There is a designated Center Manager			G2
2	Regular management/team meetings are held			G2
3	Staff roles are clearly defined (job descriptions, scope of authority, etc.)			G2
4	Personnel are cross-trained on other partner services			G2
5	Intake process streamlined so that common data elements are collected once			G2
6	Customer can apply for or be given application information on all mandated partners			G2
7	Continuous staff development strategies are in place			G2
8	Unified marketing plan has been implemented			G1.S4
9	Staff knows and supports the Center/WICCO goals			G2.S4
10	Core strengths of the partners are used to meet center goals			G2
11	Work processes are in place to promote sharing and continuous improvement			G2.S1
12	<i>There is a process to assess customer satisfaction</i>			G1
13	The staff is involved in identifying and implementing service delivery improvements based on customer feedback			G2.S1

**Center Management & Operations Point Total**

Weight factor  x3 Maximum points=104

**TOTAL POINT VALUE FOR CENTER MANAGEMENT**



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**Planning** **Item Points** **Comments** **Strategic Plan Goal**

**Standard:**

The center and staff have a center specific strategic plan for meeting customer needs and utilizes performance data to enhance center collaboration and accomplishments

1	A model for continuous improvement is in place		G2 & G4
2	The center identifies/tracks work-force related community issues		G2
3	The staff uses community demographics and other information to establish and implement specific goals and action steps		G5
4	The center has a strategic plan		G1
5	A Sales and marketing plan is part of the strategic plan		G1 & G6
6	The center collects customer satisfaction information		G1
7	The center uses the customer satisfaction information to improve the services offered to customers		G1(Collect) G2implemnt
8	Benchmarks and targets are used for continuous improvement		G1
9	The center uses performance data to set direction and make course adjustments		G1
10	Center plans for and offers specific business services		G1

**Planning Point Total**

Weight factor  x2 Maximum points=80

**TOTAL POINT VALUE FOR PLANNING**

*TOTAL POINT VALUE FOR THIS SITE*

Reviewer Name: \_\_\_\_\_

Date: \_\_\_\_\_



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SITE: \_\_\_\_\_

		<b>90%</b>	<b>75%</b>
TOTAL POINT VALUE FOR CENTER DESIGN & LAYOUT	Maximum points=76 _____	68	57
TOTAL POINT VALUE FOR CUSTOMER RESOURCES	Maximum points=112 _____	101	84
TOTAL POINT VALUE FOR SERVICES	Maximum points=384 _____	346	288
TOTAL POINT VALUE FOR PARTNERSHIP	Maximum points=48 _____	43	36
TOTAL POINT VALUE FOR CENTER MANAGEMENT	Maximum points=104 _____	94	78
TOTAL POINT VALUE FOR PLANNING	Maximum points=80 _____	72	60
<b>TOTAL POINT VALUE FOR SITE</b>	<b>Total Maximum Points=804</b> _____	<b>724</b>	<b>603</b>

Reviewer: \_\_\_\_\_

Date: \_\_\_\_\_

**Full Certification requires a score of 90% of each category point total or of the total points available**  
**Conditional Certification requires a score of 75% of each category point total or of the total points available**

**Minimum threshold for consideration: Each Center must meet WIA minimum requirements as specified in 20 CFR Part 662**

Workforce Investment Council  
Compliance  
Section 2

January 1, 2013 – June 30, 2014

**A. TRANSPARENCY**

1. *Please include documentation that opportunity for public comment on, and input into the development of the local workforce investment plan, was provided prior to its submission to the state.*

(Attachment 1)

2. *Please include documentation that copies of the proposed local plan were made available to the public (through such means as public hearings and local new media).*

(Attachment 1)

3. *Please provide documentation that the LWIB provided at least a 30-day period for comment by the local board and members of the public, including representatives of business and labor organizations, prior to its submission to the Governor.*

(Attachment 1)

4. *Please show that information about the plan was made available to the public on a regular basis through open meetings.*

(Attachments 2, 3, 4, 5)

5. *If applicable, please submit any comments received that express disagreement with the plan to the Governor along with the plan.*

No comments received.

**B. GOVERNANCE**

1. *Local Board Description*

- a) *Describe your local Workforce Investment Board: composition; membership and organizations they represent; structure, including any sub-committees; legal status; how staffed; etc. Who are the Chief Local Elected Officials and how do they interact with governance of the Board?*

The Workforce Investment Council has a 35-member Board. The members represent private industry, labor, educational institutions, local government, manufacturing and service agencies creating an effective partnership between businesses and workforce service agencies.

Section 2: Compliance

<b>Membership Category</b> List business or agency name	<b>Names</b> Member's Name	<u><b>Term</b></u> <u><b>Expiration</b></u> <u><b>Date</b></u>
Representatives of business in the local area (majority)		
Garron Grounds, Inc.	Ken Bartus	6/30/15
Benchmade Knives	Ron Britt	6/30/15
PNDC	Lisa Brookshier	6/30/15
Package Containers	Bob Degnan	6/30/13
Canby Chamber of Commerce	Bev Doolittle	6/30/13
J. Frank Schmidt and Son	Gary Furr	3/30/15
Blount	Julie Hugo	12/30/13
Consultant	Howard Klink	6/30/15
Consultant	Pam Meredith	6/30/15
Miles Fiberglass & Composites	Lowell Miles	6/30/13
Marks Metal Technology	Dan Parker	6/30/15
Kaiser Permanente Hospital	Gary Peterson	12/30/13
IITR Truck School	David Riggins	6/30/13
Jerry Smith & Associates	Jerry Smith	6/30/15
Pioneer Pump, Inc.	Paul Schlumpberger	06/30/14
Portland General Electric	Theresa Taaffe	6/30/15
Bob's Red Mill	Dennis Vaughn	6/30/15
Plumbing & Mechanical Contractors Association	Frank Wall	6/30/15
The Cedars Companies	Michael Wells	6/30/15

Section 2: Compliance

<b>Membership Category</b> List business or agency name	<b>Names</b> Member's Name	<b><u>Term</u></b> <b><u>Expiration</u></b> <b><u>Date</u></b>
Representatives (two or more) of local educational entities		
Clackamas Community College	Joanne Truesdell	6/30/13
Clackamas Education Service District	Milt Dennison	6/30/13
Clackamas Education Service District	Megan Helzerman	6/30/15
Oregon City School District	Larry Didway	6/30/14
Representatives (two or more) of labor organizations		
Labor Community Service Agency (LCSA)	Vicki Burns	6/30/13
Teamsters Local #305	Steve Pickle	6/30/13
UA Local 290	Jed Scheuermann	6/30/15
Representatives (two or more) of community-based organizations (including organizations representing individuals with disabilities and veterans, for a local area in which such organizations are present)		
Labor Community Service Agency (LCSA)	Vicki Burns	6/30/13
Community Solutions for Clackamas County	Maureen Thompson	6/30/13
Representatives (two or more) of economic development agencies, including private sector economic development entities		
Canby Chamber of Commerce	Bev Doolittle	6/30/13
Clackamas County Business & Economic Development	Cindy Hagen	6/30/13
The Cedars Companies	Mike Wells	6/30/15
Representatives of each of the One-Stop partners who represent agencies and/or organizations who		

Section 2: Compliance

<b>Membership Category</b> List business or agency name	<b>Names</b> Member's Name	<b><u>Term</u></b> <b><u>Expiration</u></b> <b><u>Date</u></b>
carry out the following:		
Programs authorized under Title I of WIA		
Clackamas Community College	Joanne Truesdell	6/30/13
Timber Lake Job Corps	Warren Cunningham	6/30/15
Clackamas ESD	Megan Helzerman	6/30/15
Community Solutions	Maureen Thompson	6/30/13
Programs authorized under the Wagner-Peyser Act (Employment Services)		
Oregon Employment Department	Kim Freeman	6/30/15
Adult education and literacy activities authorized under Title II of the Act		
Clackamas Community College	Joanne Truesdell	6/30/13
Vocational rehabilitation programs authorized under title I of the Rehabilitation Act of 1973		
Oregon Department of Human Services	Jerry Buzzard	6/30/13
Welfare To Work programs authorized under section 403(a)(5) of the Social Security Act		
Oregon Department of Human Services	Jerry Buzzard	6/30/13
Senior Community Employment Program activities authorized under Title V of the Older American's Act		
Community Solutions for Clackamas County	Maureen Thompson	6/30/13
Health, Housing and Human Services - Clackamas County Social Services	Brenda Durbin	6/30/15

Section 2: Compliance

<b>Membership Category</b> List business or agency name	<b>Names</b> Member's Name	<b><u>Term</u></b> <b><u>Expiration</u></b> <b><u>Date</u></b>
Postsecondary vocational education activities authorized under the Carl D. Perkins Vocational and Applied Technology Education Act		
Clackamas ESD	Megan Helzerman	6/30/15
Clackamas Community College	Joanne Truesdell	6/30/13
Trade Adjustment Assistance activities authorized under Chapter 2 of Title II of the Trade Act of 1974		
Oregon Employment Department	Kim Freeman	6/30/15
Activities authorized under Chapter 41 of Title 38, U.S. Code (DVOP/LVER)		
Oregon Employment Department	Kim Freeman	6/30/15
Employment and training activities carried out under the Community Services Block Grant (Community Action Agencies)		
Clackamas County Social Services	Brenda Durbin	6/30/15
Employment and training activities carried out by the Department of Housing and Urban Development		
Clackamas County Social Services	Brenda Durbin	6/30/15
Programs authorized under State unemployment compensation laws		
Oregon Employment Department	Kim Freeman	6/30/15
TANF programs authorized under part A of Title IV of the Social Security Act		
Oregon Department of Human Services	Jerry Buzzard	6/30/13
Employment and training and work programs authorized under Section 6(d)4 and Section 6(o) of the Food Stamp Act of 1977		

Section 2: Compliance

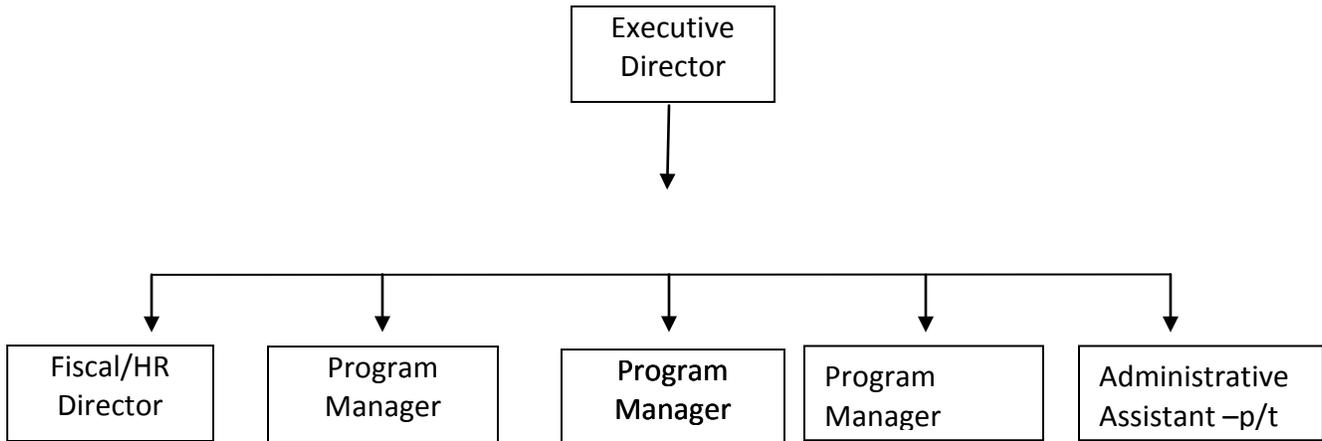
<b>Membership Category</b> List business or agency name	<b>Names</b> Member's Name	<b><u>Term</u></b> <b><u>Expiration</u></b> <b><u>Date</u></b>
Oregon Department of Human Services	Jerry Buzzard	6/30/13
<i>Other</i>		
Local elected official	Clackamas County Commissioner Jamie Damon	N/A

The Workforce Investment Council's committees are:

1. The **Executive Committee** provides oversight and direction on overall objectives and budget for the Workforce Investment Council.
2. The **Business Services Committee** creates innovative strategies to help businesses meet their workforce needs and focuses on high growth industries and how to best supply skilled workers to Clackamas County businesses.
3. The **Emerging Workforce Committee** supports the development of a pipeline of workers for Clackamas County and its high growth businesses.
4. The **Budget/Audit Committee** creates the budget for the upcoming Program Year to be approved by the full Board, meets with the auditor annually and reviews the audit.

The Workforce Investment Council is a 501(c)(3) organized in accordance with its bylaws and WIA requirements. The fiscal agent for Title 1B of the Workforce Investment Act is the Workforce Investment Council.

**Workforce Investment Council Organizational Chart**



The Board of County Commissioners, Chair Lehan, Commissioner Bernard, Commissioner Lininger, Commissioner Savas and Commissioner Damon, represent the Chief Local Elected Officials in Clackamas County. One elected official from Clackamas County shall serve on the Board. The Clackamas County Board of Commissioners appoints which County Commissioner shall serve. Commissioner Jamie Damon is a WICCO board member.

*b) Describe the relationship and the functional separation between the board/board staff and service delivery providers. Please include any organization charts if available.*

The Workforce Investment Council’s Separation of Governance and Service Provision policy, WIA-12, states, “The Workforce Investment Council board and staff recognize that the prohibition of service provision, within the requirements of the WIA, especially of training, applies to local boards and board staff and will assure Region 15 compliance with this directive.”

Please find the organizational chart attached **Attachment 6**.

*c) If your board was certified by the governor as an alternative entity, describe how mandated partners who are not members will access the board.*

N/A

*d) Describe your youth council, its membership, and how it will carry out its responsibilities for the coordination of local youth services and programs.*

The Youth Council, called the Emerging Workforce Committee in Region 15, is charged with developing strategies to prepare the emerging workforce for employment, opportunities in education and work preparedness skills. This committee oversees the youth provider in our local area by doing the following:

## Section 2: Compliance

- Approves local enrollment goals for our youth employment and training program
- Develops a local plan for the delivery of youth services, including connections with WorkSource Clackamas
- Reviews RFPs for local youth services
- Participates in reviewing proposals for the delivery of WIA youth services
- Selects programs that contribute to the attainment of local goals and priorities
- Reviews local youth and employment and training policy and suggests revisions or additions to the WIB
- Meets no less than once per quarter to review the performance of the local youth system.

Emerging Workforce Committee members are:

Cunningham, Warren  
Timber Lake Job Corps  
[wcunningham01@fs.fed.us](mailto:wcunningham01@fs.fed.us)

Dennison, Milt  
Clackamas Education Service District  
[mdenniso@clackesd.k12.or.us](mailto:mdenniso@clackesd.k12.or.us)

Brown, Jane  
Housing Authority of Clackamas  
County  
[janebro@co.clackamas.or.us](mailto:janebro@co.clackamas.or.us)

Helzerman, Megan  
Clackamas Education Service District  
[mhelzerm@clackesd.k12.or.us](mailto:mhelzerm@clackesd.k12.or.us)

Buzzard, Jerry  
Department of Human Services  
[Jerry.Buzzard@state.or.us](mailto:Jerry.Buzzard@state.or.us)

Hugo, Julie  
Blount Int.  
[julie.hugo@blount.com](mailto:julie.hugo@blount.com)

Hartman, Matthew  
Clackamas County Juvenile  
Department  
[MHartman@co.clackamas.or.us](mailto:MHartman@co.clackamas.or.us)

Previs, Tom  
Oregon Employment Department  
[Tom.A.Previs@state.or.us](mailto:Tom.A.Previs@state.or.us)

Burns, Vickie  
Labor's Community Service Agency  
[veburns@qwestoffice.net](mailto:veburns@qwestoffice.net)

Clark, Mary  
Department of Human Services  
[mary.s.clark@state.or.us](mailto:mary.s.clark@state.or.us)

*e) Describe the process your L/RWIB utilizes to assure that the one stop system meets the intent, rules, regulations and requirements of the WIA Title IB program. (e.g. monthly performance, fiscal reports to board, etc.).*

The Workforce Investment Council Board has made a conscious decision to focus on policy and strategic initiatives rather than operational issues of the provider system. The

## Section 2: Compliance

Workforce Investment Council administrative staff works collaboratively with the One-Stop partners to ensure that the One-Stop meets the intent, rules, regulations, and requirements of the WIA T1B program.

Management staff of partners co-located at WorkSource Clackamas and the WorkSource Clackamas Annex comprises a collaborative defined as the One Stop Operator. This group, called the WorkSource Clackamas Partners, provides direction and coordination for the activities in the centers and makes sure services are provided efficiently and effectively. The partners in this group include:

- Workforce Investment Council of Clackamas County
- Oregon Employment Department
- Oregon Department of Human Resources
- Clackamas Community College
- Office of Vocational Rehabilitation Services
- C-TEC Youth Services
- Job Corps
- Easter Seals
- Clackamas County Social Services
- Community Solutions for Clackamas County
- Immigrant and Refugee Community Organization (IRCO)
- Express Employment Professionals
- Housing Authority of Clackamas County
- Clackamas County Community Corrections

Leadership Team meetings are held twice a month and are attended by management of the four key partners in the system: Oregon Employment Department, Workforce Investment Council of Clackamas County, Clackamas Community College and Community Solutions of Clackamas County. Issues are discussed, processes reviewed and suggestions made to improve the service delivery at the centers.

A Customer Satisfaction Survey is used to gather comments from customers and employers who use center services. The results inform quality improvement efforts on an ongoing basis.

*f) Discuss how the local board will be educated on their role, engaging all the local partners, and providing guidance to the local workforce system.*

As members are appointed to the Workforce Investment Council's Board, the Executive Director meets individually with each member to go through a binder with pertinent information. Binders include information on the Workforce Investment Act, the history, mission and vision of the Workforce Investment Council, bylaws, Memorandum of Agreement with Clackamas County, Board and committee meeting information and Board member and officer job descriptions.

The Workforce Investment Council Board members engage the local partners and provide guidance on local workforce development issues which include the following:

- Hosting an annual event, with the dual purpose to educate local business about the role of the Workforce Investment Council Board in workforce development and to serve as a recruiting effort
- Maintaining the Workforce Investment Council website ([www.wicco.org](http://www.wicco.org)) which provides information on programs, priorities, and system issues
- Posting information and events on social media
- Convening regularly scheduled board meetings open to the public
- Convening a strategic planning session to map out goals for the system
- Creating board sub-committees to address system issues
- Presenting to Board of County Commissioners annually

## 2. *Partnerships*

### a) *Describe any special characteristics of the partnerships (e.g. consortia).*

There are a variety of strong committees and consortium in Clackamas County that the Workforce Investment Council participates in or facilitates. They include:

- The Clackamas County Green Alliance – supports green, sustainable efforts in Clackamas County
- The Clackamas County Business Alliance – An advocacy organization that has identified workforce as one of its key business agenda items.
- The Clackamas County Economic Development Commission – A county led board of private industry that addresses economic development issues in the county.
- Seven different Chambers of Commerce throughout the region – Support local businesses in towns and cities throughout the region.
- Greater Portland Inc Economic Development roundtable – share information pertaining to economic growth and workforce in the metro region.
- North Clackamas Chamber of Commerce Public Policy Committee – share public policy agenda, identify goals and priorities for the Chamber to address.
- Clackamas County Employment First Team – An interagency effort to support Employment First policy implementation, finding competitive employment for individuals with Developmental and Intellectual disabilities.
- Clackamas County Supported Employment Council – An interagency effort to support individuals with severe and pervasive mental health issues.
- Disability Provider Network – An interagency effort to work on issues and gaps for individuals with disabilities in Clackamas County.
- Strong Bond, a workforce - corrections collaborative
- Homeless Council for Clackamas County – Makes policy recommendations to the board of County Commissioners related to homelessness in the county.
- Clackamas Academy for Industrial Science – A charter school focusing on STEM curriculum.

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- Youth Services Provider committee – An informational group of youth providers facilitated by the Dept. of Human Services in Clackamas County.
- North Clackamas Social Needs Roundtable – A consortium of local non-profits, public entities, and faith-based organizations that meet for the purpose of assisting the most vulnerable residents.
- The Columbia Willamette Workforce Collaborative – A partnership of the three Workforce Investment Boards representing the Vancouver-Portland Metropolitan Area. The Collaborative is designed to provide a coordinated approach to engaging and serving industry, supporting economic development and guiding public workforce investments.
- Manufacturing 21 – A board of manufacturers who meet to address common issues among manufacturing employers. Workforce is a steady agenda topic.
- Oregon City Government and Economic Affairs Committee – Discusses public policy related to economic growth and development in Oregon City.
- Children of Incarcerated Parents committee – A Clackamas County group that provides programs, education and supportive services for pro-social living to adults in the Oregon prison system and to children and families in the community and helps to address the full spectrum of social factors impacting the health of individuals and communities.
- Human Services Advisory Council for Clackamas Community College – To help inform the skill needs of CCC students interested in entering the human services field.

b) *Please describe and attach any board issued policies, memoranda, or directives that require and support integration of workforce services (both strategic and service delivery oriented).*

At the Executive Committee meeting on May 15, 2008, a formal motion was passed adopting the Integrated Services Plan. (Attachment 7). Full integration continues at the WorkSource Clackamas one-stop and the WorkSource Clackamas Annex.

c) *Describe how all the local partners were engaged in the development of this plan. include:*

- i. Business;*
- ii. Labor;*
- iii. Education;*
- iv. Community and Economic Development;*
- v. Local Tribal Nations.*

This planning process has been robust since the concepts were initially introduced at the April 2012 board meeting. Since that time multiple conversations have occurred at Board of Director's meetings, Executive Committee meetings, Business Services Committee meetings (Attachments 2,3,4,5), Leadership Team meetings and the One Stop Operator

meetings. Additionally, individual meetings with economic development professionals and Oregon Employment Department partners have occurred. All populations (with the exception of v. because Region 15 does not have a local tribal nation) have been actively included during this process.

- i. Business:
  - ◆ Board membership includes representatives from business and business associations like chambers of commerce
  - ◆ Executive Committee membership
  - ◆ Business Services Committee membership
  - ◆ Conversations at meetings of the Clackamas County Business Alliance
- ii. Labor:
  - ◆ Board membership includes three representatives from labor and the executive director of an association representing contractors who are signators to labor unions.
  - ◆ Committee representation includes labor
- iii. Education:
  - ◆ Board membership includes representatives from community colleges, ESD, local school districts
  - ◆ Committee membership includes representatives from education
- iv. Community and Economic Development
  - ◆ Board membership includes representatives from the County Business and Economic Development Department
  - ◆ Committee membership includes representatives from local economic development (city and counties)
  - ◆ Discussions with the Clackamas County Business Alliance staff and board members have occurred informally

### **C. DESCRIPTION OF ONE-STOP DELIVERY SYSTEM**

1. *Describe your local area delivery of core, intensive and training services. Please provide documentation of your system showing all service delivery sites and how core, intensive and training services are delivered at each site and by workforce partners (See Attachments A through D).*

Region 15 's core, intensive and training services are delivered by four key providers and partners. The majority of this work takes place at WorkSource Clackamas (WSC). The primary WIA provider, Clackamas Community College, has permanent staff placed at WSC. In addition to WSC, basics workshops and intensive service delivery for barrierred populations occurs at the WorkSource Clackamas Annex. The Annex is staffed and funded by Department of Human Services, Oregon Employment Department, WIA, Clackamas County, and other federal funds. In addition to intensive work with barrierred

job seekers, workshops are offered on topics like Resume Writing, Interviewing Skills, etc. More advanced workshops are offered through a contract with Express Personnel and take place at the Workforce Development Department on the campus of Clackamas Community College and are targeted at business professionals and higher level job seekers. The National Career Readiness Certificate testing is also available to all job seekers at both sites.

Intensive level services are those services that are designed to determine appropriate or additional training or skill development needs, or structured formal coursework and short term prevocational services. These services are delivered by all of our Adult/Dislocated Worker sub recipients and include the development of an individual employment plan, work experiences, General Educational Development diploma (GED) and English as a Second Language (ESL) classes and certification courses of less than 40 hours per week.

Training services are delivered by all of our Adult/Dislocated Worker sub recipients and include occupational training and On-the-job Trainings (OJTs). Customized training is also a training option.

*2. Describe the process for selection and designation of the One-Stop Operator.*

The Workforce Investment Council Board of Directors discusses and takes action annually on the one stop operator. Currently the One-Stop Operator is a consortium of service delivery partners invested in the one stop. Each year a full report on the One-Stop is presented to the board of directors. This report includes results from customer service satisfaction surveys, updates on the different programs delivered through the one-stop, and ultimately board action occurs identifying the operator. In recent history, the board has voted to continue identifying the one stop operator as the consortium of partners at the one stop.

*3. Describe how the local board will ensure the continuous improvement of eligible providers of services through the system.*

Service providers are chosen through our competitive Request for Proposal (RFP) process at least once every 5 years. Ongoing monitoring of these service providers by workforce board staff and regular reporting to the full board keeps key players up to speed on the success and improvement of local providers of workforce services. Over the last year, the primary Adult/Dislocated Worker service provider has paid special attention to accuracy when delivering program services. This has occurred through special trainings, continuous monitoring, site visits, observations, regular communication and an increased attention to detail and re-focus on stellar service delivery. Other service providers currently in contract are assessed on their ability to respond to suggestions made by workforce board staff.

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In addition to monitoring, an annual quality assurance survey is sent to participants registered in the WorkSource Clackamas system. The information gathered through this survey process is reviewed and acted upon. Areas of concern are addressed and improvements are implemented.

4. *Describe how the local board will ensure that such providers meet the employment needs of local employers and participants.*

In addition to work being done locally in Region 15, a broader approach to industry intelligence has been implemented with the workforce boards of Region 2 in Oregon and the Southwest Washington Workforce Development Council. This formalized structure, The Columbia Willamette Workforce Collaborative, has an advisory board comprised of representatives from each workforce investment board and other key investors from economic development. The goals of The Collaborative provide a regional approach to meeting industry demands by bridging regional governments, business, labor, educational institutions, and economic development.

The Collaborative has developed a model for sector engagement which will ultimately inform the regional workforce boards of local employer needs. This model is broken down into five phases:

Phase 1: Investigate – Determine target industry

Phase 2: Inventory and Analyze – Examine and analyze industry growth trends based on labor market information, employer surveys and contact

Phase 3: Convene – Prioritize potential workforce initiative and identify stakeholders in industry panels

Phase 4: Act – Implement workforce initiatives

Phase 5: Evaluate – Assess our actions and results

Locally, in Region 15, staff and contracted providers utilize The *Strategic Occupation List* to provide guidance on which occupations are allowable for investment. Participants are given options of choosing from the occupational list. This data driven prioritized list assures investment with participants will result in training for in-demand occupations. The list is updated annually and provides assurance that skills gained by job seekers will be in demand, and employers will have access to educated job candidates.

Informally, the relationship with the Clackamas County Business Alliance (CCBA) allows for regular communication with key employers in the region, providing a unique connection to the demand side of the workforce. The CCBA has identified workforce as one of the key issues on their business agenda.

Other less significant activities that the board utilizes to ensure the employer and participant demands are met include:

- Regular presentations on labor market research to keep the Board informed

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- Active involvement by Economic Development professionals
  - Robust discussions during Business Services Committee meetings
  - Regular review of Oregon Employment Department customer service surveys
  - Interaction and information sharing with the Oregon Employer Council
  - Review of statewide and local Employment Department data
  - Information sharing with Clackamas Community College advisory boards for Career and Technical Educational programs
  - Communication with employers and participants through on-the-job training agreements
  - Activities provided for employers around layoff assistance or rapid response
5. *Describe and provide an assessment of the type and availability of adult and dislocated worker employment and training activities in the local area, including a description of the local ITA system and the procedures for ensuring that exceptions to the use of ITAs if any are justified.*

Located in a metropolitan area with access to a wide variety of private career schools as well as community colleges and four-year institutions, there is an adequate supply of eligible providers available for participants who qualify for ITAs. Region 15 encourages the use of ITAs as well as OJTs to meet both participant and employer needs in the region.

All participants receiving services will have access to the full array of workforce development services within the WorkSource Oregon service delivery system. Referrals to the Skills Team at WorkSource Clackamas are made after a participant has completed the Welcome Process and are based on a request by the participant. Referrals are also made to the other Adult and Dislocated Worker service providers serving specific barrierred populations following the same process.

After the referral to the WIA Skills Team, the participant attends a Gateway session to explore career interests. Service providers serving barrierred populations provide career exploration services in a one-on-one setting with the participant. In all cases, if the participant is interested in continuing in the process, they must first be determined to be eligible for the ITA. This includes establishing that the participant was eligible for and received one or more core and intensive service(s) and was determined to be unable to obtain or retain employment through the core and intensive service(s). Service provider staff further determine through an interview, evaluation, or assessment, that the participant is in need of training services and has the skills and qualifications to successfully complete the selected training program. The chosen training program is evaluated against employment opportunities in high-demand occupations listed on the Strategic Occupations List and the participant's ability to obtain grant assistance from other sources is identified.

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ITAs may be issued only for training for occupations on the Strategic Occupations List and approved training programs on the Eligible Training Provider List. During the Gateway session or one-on-one career assessment meetings, participants are asked to propose their employment goal, training plans, and possible training providers. Workforce specialists then help the participant identify the best possible choice based on cost, location, curriculum, and timelines of the training program.

There is no set time limit for the length of training. The appropriateness of a participant's engagement in any short or long-term training is based on the customer's individual needs and situation.

ITAs may be used to pay for the cost of a participant's training, including required registration, tuition, fees, books, equipment, disposable supplies, and other required payments. Although there is no absolute dollar limit on the training cost, an average cost per customer of less than \$2,500 is desirable.

If a participant chooses a training not supported by the Strategic Occupations List, exceptions can be granted on a case-by-case basis. A strong reason why an exception would be granted is that the training was chosen in direct partnership with an employer who was willing to hire upon completion of the training.

In exceptional circumstances training providers may be approved who are not yet on the Eligible Training Provider List (ETPL) following CCWD policy 589-30.6. In all cases, justifications for such exceptions are clearly documented in the participant's Individual Employment Plan.

6. *Describe how customers access core, intensive and training services in your local one-stop system, including non- and limited-English speakers, people with disabilities, TANF clients and others with Barriers to employment, by site.*

Worksource Clackamas is an integrated one-stop center. As someone enters the Center, they are required to complete the Welcome process. The first step is Customer Registration. Date of Birth Validation and iMatchSkills® Profile can occur in any order following Customer Registration. Once these steps are complete, a participant will have a one-on-one meeting with a staff member to discuss Next Steps.

Every participant that completes the Welcome Process has access to core services, and potentially can tap into intensive and training services. Also, if someone needs further training or career guidance to make them more competitive in job search, the Skills Team can provide coaching. Emphasis is placed on high growth industry sectors and short-term certificates.

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*Non- and limited-English speakers:* Participants are referred to the Skills Team if they express interest in tools such as GED or ESL instruction. Interpreters are available in-house for Spanish and Russian speakers and the Language Line is available when needed.

*People with disabilities:* Interpreters can also be brought in with proper notice for other languages or ASL. Appropriate accommodations are made upon request.

*TANF clients:* TANF recipients are served through the WorkSource Clackamas Annex in partnership with Department of Human Services, as are other barriered populations such as Housing recipients and Corrections participants. This site is focused on serving job seekers with barriers to employment with personalized, intensive level services. There are several investors.

*Others with barriers to employment:* For participants with criminal backgrounds, there are several options available. A workshop for individuals to teach them to talk about their convictions with employers is offered through a local corrections partner. A special WIA grant contracted through CSCC is available for long-term unemployed, individuals with a mental health diagnosis, or those with a background issue. WICCO was recently awarded a grant to serve predominately female ex-offenders leaving recent incarceration. WICCO, in partnership with Worksystems, Inc., will also be working with Housing Authority residents to secure employment and build self-sufficiency.

- a) *Describe the criteria used for determining whether Title I funds are limited for adult employment and training activities, and the process by which any priority will be applied by the One-Stop Operator.*

See Workforce Investment Council's WIA-11 Priority of Service Policy (Attachment 8).

- b) *Describe any populations prioritized for services, other than those required for Title I, and the process used to determine the need/eligibility for prioritization.*

Region 15's Board identified the need to serve special barriered populations in the region. As a result, in February 2010 the board published an RFP for services to targeted populations with barriers to employment. The language in the RFP was broad in defining 'individuals with barriers'. As a result, two contracts for service delivery were awarded. They include a focus on services to job seekers who 1) speak English as a Second language (with an emphasis on Spanish language) and 2) have barriers to employment that include persistent, consistent mental health issues, a criminal background, or long term unemployment. The process for determining funding for these contracts included broad input from community partners, a specific committee who reviewed and recommended entering into the contracts, and discussion and ultimately approval of the Business Services Committee and full board. These contracts have been renewed twice and will go out

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for RFP in another year. Close monitoring of these special population contracts have resulted in positive results. In addition to these WIA formula funded contracts, Region 15 received two competitive DOL grants with an emphasis on ex-offenders and public housing residents.

7. *Describe your local system's integrated service strategies to meet the needs of specific population groups or customers. These can be populations targeted through your local strategic planning process, local priority customers, or any specific populations receiving an integrated set of services. Populations to be included are:*

The greatest example of integrated service strategies exists at the WorkSource Clackamas Annex. This site is focused on serving job seekers with barriers to employment with personalized, intensive level services. The investors are varied. When a person enters the site it is impossible to differentiate staff by funding streams. This Annex was created as a result of informal and formal conversations throughout the region and was started in the midst of massive budget cuts to the Department of Human Services program. The need to minimize duplication, pool resources and serve participants more efficiently was magnified. As a result, the Annex was created and continues to expand to more intensely serve veterans, ex-offenders and others.

*a) Non English and Limited-English speakers*

Non English speaking job seekers have access to intensive, personalized services through the contract with IRCO. This targeted contract has proven to be very successful through the term of the contract. Given demographic data, the focus in Clackamas County is on people who speak Spanish as their native language. However, all job seekers have access to interpretation services.

*b) People with disabilities*

Participants self-select disclose if they have a disability. Upon request, accommodations can be put in place in order to help individuals get a fuller experience through WorkSource. If someone has a mental health diagnosis, the WIA funded Employment Solutions program through Community Solutions for Clackamas County (CSCC) will provide them with job development. A partner within WorkSource Clackamas is Oregon Vocational Rehabilitation Services (OVRs). A referral is made to OVRs for more intensive support with job search.

There are several partner groups and teams in the community to help enhance services available to job seekers with disabilities. WorkSource and Workforce Investment Council staff represent workforce on teams specific to developmental and intellectual disabilities, mental health disorders, and identifying gaps for varied disabilities.

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### *c) People with low basic skills*

WorkSource Clackamas offers a range of services for individuals with low basic skills. For job seekers interested in increasing their skills, the GED, Adult Basic Education (ABE) and WIN courseware are available. There are several job search workshops available for job seekers with low basic skills and limited computer skills.

### *d) Migrant and seasonal farm workers*

The Migrant & Seasonal Farmworker (MSFW) Program provided by OED assures the delivery of employment services to farmworkers. Local office staff assure that MSFW applicants receive a complete explanation of agency services by conducting outreach activities at living, working and gathering sites of farmworkers. They also meet with both agricultural and non-agricultural employers to promote the hiring of MSFW and disseminate information. If needed, WorkSource Clackamas staff then coordinates services with other agencies serving the farmworker population.

### *e) TANF clients*

TANF clients have full access to all WorkSource services. Through the Worksource Clackamas Annex, Department of Human Services contracts with Community Solutions of Clackamas County to assist Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP) recipients with job search and development. Clients are encouraged to attend WorkSource workshops supported by WIA.

### *f) Other Populations targeted by the LWIB*

The Workforce Investment Council has recently been awarded two grants: one serving ex-offenders and one serving individuals receiving housing assistance. Both grants include support for intensive level services to participants, job development/coaching, training supports, and supportive services.

## *8. Describe the tactics and methods adopted by the LWIB to assure that the service delivery system meets the needs of businesses, jobseekers, and workers in the local area.*

The clearest method Region 15 uses to meet the needs of employers is the Strategic Occupations List. This list is compiled and updated annually by the research department of the Oregon Employment Department. The list identifies occupations in the metro area where there is projected job growth. The list is divided by education requirements and identifies the top 100 occupations. Service delivery providers are instructed to invest only in those occupations. This ultimately will meet the workforce needs of employers in our metro region. In addition to the Strategic Occupations List used locally, the work with the Columbia Willamette Workforce Collaborative (CWWC) informs investments to assure job seekers are becoming trained in areas where there will be high demand in order to meet employers workforce needs. Currently, the

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CWWC is focused on health care and manufacturing because both sectors promise healthy growth in the next ten years.

*a) Describe how job seekers and job seeker service providers are:*

- i. Engaged and continually re-engaged with services, and connected to the labor exchange system; and,*
- ii. Made aware of specific employer needs, requirements and opportunities.*

Job seekers are engaged immediately when entering the Worksource Center and after the Welcome process is complete, Worksource staff engage job seekers to determine their needs and interest in accessing further services. Staff use Oregon Labor Market Information System (OLMIS) information and tools to inform participants about industries of interest and the demand in the metropolitan area. The workshops offered in Region 15 range from basic interviewing techniques and resume writing to more advanced job seeking strategies provided by WIA funded Express Personnel for the more sophisticated job seeker. All of the job search workshops offered utilize labor market information to inform participants about the job market in the area. After conversations with Skills Team members, if a participant shows willingness and interest in training, they are invited to attend the Career Gateway workshop that is conducted by Clackamas Community College provider staff where they access information and tools through the Oregon Career Information System (CIS) program.

The ongoing interactions with employers informally and formally provide direct information on their needs, requirements and opportunities. Specifically, each month the Employer Spotlight provides an opportunity for job seekers to interact directly with employers in the area. Job seekers can ask questions and garner insight to what employers are looking for and value in an employee. The integrated Business and Employer Services Team works closely together to share information about employer demand, recruitment opportunities, OJT and other employer intelligence that benefits participants. The work being done with the Columbia Willamette Workforce Collaborative will also help inform staff about key industry needs.

*b) Describe how employers are:*

- i. Engaged and continually re-engaged with services, and connected to the WSO system; and,*
- ii. Made aware of specific employer services, resources and workforce development opportunities.*

Locally, the integrated Business and Employment Services team communicates and promotes employer services throughout the region. Activities include individualized

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recruitments, promotion and management of OJT agreements, regular communication with business organizations like the Oregon Employer Council, the Clackamas County Business Alliance, the Portland Human Resource Management Association, the Clackamas County Economic Development Commission, Rotary groups and multiple Chambers of Commerce organizations. Engagement with employers for the Employer Spotlight each month also provides an opportunity for local employers to become familiar with job seekers and the public workforce system. Employers throughout the broader Portland Metro region are engaged collaboratively through the Columbia Willamette Workforce Collaborative. Although initially The Collaborative is focused exclusively on manufacturing and health care, The Collaborative is also engaging in conversations with high tech firms throughout the area. This targeted, intentional and systemic approach provides individualized feedback on industry and employer needs.

*c) Describe any barriers to service delivery for job seekers and businesses.*

Clackamas County has unique needs because it is both a rural and urban county. Balancing the needs of these two populations requires flexibility and creativity. In Region 15 transportation is a consistent barrier. Although several different bus services serve much of the county, the service is slow and infrequent much of the time. The location of Worksource Clackamas does not enjoy regular bus service. In addition to the location, the size of the Worksource center creates constant logistical struggles. Additional sites have been utilized to provide services that would ideally be offered in the WorkSource center. There are participants that simply can't get to the WorkSource center because of where they live. To better serve these job seekers, outreach sessions in outlying communities are held each month. Perhaps one of the largest barriers for job seekers and businesses is a general lack of knowledge and visibility about the services offered. Because of limitations on staff availability, some job seekers have difficulty utilizing all of the services WorkSource has to offer. Specifically, for job seekers with some disabilities, assistive technology is not available. The only Assistive Technology available are JAWS screen reader and one adjustable workstation. Other examples of technology that would be helpful within the WorkSource Clackamas center include Zoomtext, amplifiers, Read and Write, and Omni Page Pro. The WorkSource Clackamas Leadership team discusses solutions to barriers and works creatively to build partnerships that can assist with challenges faced by WorkSource Clackamas participants.

*d) Describe how the local board will focus on building and sustaining relationships with businesses.*

The Workforce Investment Council and staff enjoy a positive relationship with multiple employers throughout the region. The management relationship with the Clackamas County Business Alliance (CCBA) allows for immediate access to a wide

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variety of employers. In addition to the CCBA relationship, workforce board members, staff and provider staff all are involved with business organizations like Rotary, local Chambers of Commerce, the Clackamas County Economic Development Commission, and the Oregon Employer Council. In addition to these relationships locally, the work of the Columbia Willamette Workforce Collaborative provides an opportunity to engage with employers throughout the Portland Metro region.

- e) *Describe how the local board will engage the business community in the design and improvement of business services.*

The full Board of Directors, Executive Committee and the Business Services Committee provide ongoing feedback to workforce board staff on what is working well and what could be improved within the workforce system. Formal and informal communication occurs during conversation with employers throughout the region. Another formal means for engagement includes the Region 15 Leadership Team. This team meets twice a month to discuss comprehensive WorkSource services. Feedback from line staff working directly with job seekers and employers is shared with the Leadership Team. Ideas for improvement are discussed and plans for implementation are made regularly on how to continually improve services to businesses in the region. In addition to these approaches, the ongoing training that Clackamas Community College provides in their Customized Training Department and Small Business Development Center helps inform what is working and what is not within the public workforce system. Once again, the work of the Columbia Willamette Workforce Collaborative is a concrete, very specific way that employers are engaged in business services throughout the Portland Metro area. The Workforce Investment Council, in collaboration with the Clackamas County Business Alliance, Clackamas County Economic Development Commission, the local Oregon Employer Council, and Clackamas Community College, is organizing a networking event for employers who serve on the many boards, councils, and committees supporting workforce and economic development issues in Clackamas County.

- f) *Describe how the local board will enhance services to job seekers.*

Providing outstanding services to job seekers is a topic of discussion at all regular committee meetings and Leadership Team meetings. In an attempt to provide more formalized feedback and input, a quality assurance survey was developed to inform the Workforce Board on how job seekers perceive the services offered at WorkSource Clackamas. This survey was developed in partnership with the One Stop Operator Consortium and was designed to be completed in a short period of time but provide opportunity for further feedback. The input received from the quality assurance survey has informed workshop development and offerings and service delivery. In addition to the Leadership Team and Board of Directors reviewing these results, the Clackamas Menu of Resources and Services Team

conducts an in-depth analysis and brings very specific recommendations to the board. This has been completed two years in a row now and has proved to be very informative and helpful in the continued goal of improving services to job seekers.

- g) How does your workforce system ensure that all job seekers connect with the labor exchange system?*

At the point of enrollment, WorkSource Clackamas participants gain more information about accessing state and national labor market information through OLMIS and O\*NET. If job seekers express interest in training, they are required to attend the Career Gateway workshop which discusses labor market research and the Oregon CIS program. Individual coaching is available to guide through high demands industries in Clackamas County and the greater metro region. Many of the job search workshops incorporate tools from OLMIS and other online tools to enhance jobseekers understanding of the labor market.

- h) Discuss how the apprenticeship community will be engaged, and the plans to bring apprenticeship opportunities to job seekers.*

The Training director for the Plumber and Steamfitters union in the area serves on the Executive Committee of the Board of Directors. Having this steady presence ensures apprenticeship is regularly discussed and included in the workforce system. In addition, the Workforce Investment Council has a strong relationship with Women in Trades and works closely with them to support job seekers through WIA formula funding and specifically in the competitive grants recently received. The Employment Department staff that work on the Business Team have industries of focus for job postings and employer needs. A team member works with apprenticeship programs as a lead to act as a depository of information for job seekers. The Workforce Investment Council's youth provider hosts an Apprenticeship and Career Day for WIA youth and program partners. The program includes hands-on activities with a variety of apprenticeship programs where youth gain information about apprenticeship and career opportunities as well as safety training. The annual Youth Career Expo also features apprenticeship and trade organizations, as well as businesses, advanced education and training institutions.

- 9. Discuss how the Board anticipates further coordination of services and elimination of duplication in service delivery to maximize resources available to support training and other business services.*

When the Department of Human Resources faced dramatic budget cuts, partners in Region 15 got together and closely examined the workforce system in the area and how services were delivered. As a result, workshops were consolidated and multiple partners pooled funds to create the WorkSource Annex, a site to serve the more barriered WIA, Department of Human Services, and Corrections population. This helped

provide synergy and economies of scale while serving jobseekers, not just through workshops and basic services, but when engaging employers as well. The Business Services Committee and the One-Stop Operator Partner meetings discuss the workforce system in the region regularly, constantly looking for opportunities to consolidate and reduce duplication.

10. *All labor exchange services to be delivered as part of the One Stop delivery system via One Stop Centers or affiliate sites are required by the Workforce Investment Act 20 CFR 652.202. If Wagner-Peyser services are currently delivered outside either of these means in the LWIA, the Board must identify strategies which will bring the LWIA into compliance with the regulations.*
  - a. *Describe the local board plan for co-locating partners within the One Stop Centers.*

N/A

#### **D. INTEGRATION**

1. *Please provide narrative that describes the methods and processes used to ensure all customers are registered using a common intake and a standard welcome process.*

WorkSource Clackamas is committed to following the state direction on the integrated Welcome Process delivery. Staff attended the PIVOT training to assure consistency when meeting and enrolling customers. The PIVOT training, as well as other trainings, help staff establish consistency in conversations with participants. Ongoing training and technical support is available to staff to continue ensuring methods and processes are universal. This ensures all staff are familiar with and are using the standard Welcome process.

2. *Please describe how the design of the customer intake process and integrated customer flow will promote continual re-engagement of returning participants, and the capture of services and results leading to positive outcomes and performance.*

The design of the intake process in WorkSource Clackamas starts and ends with the customer and his or her specific needs. Upon a participants request for services, staff direct the participant to specific partners to avoid long periods of wait time. Quality customer service is heavily emphasized among all staff. As the WorkSource Center moves to the PIVOT model, individualized next steps being provided in writing will help continue to engage participants repeatedly. Within WorkSource Clackamas, the Clackamas Menu of Resources and Services team provide oversight, evaluation and recommend changes to Leadership Team. New program models have been and will continue to be implemented if a higher level of performance can be attained.

#### **E. SERVICE GAPS**

1. *Identify workforce needs for the area; then describe whether or not the present workforce system is meeting those needs. If not, indicate the extent of the gap in services needed but not provided. Such gaps may include, but are not limited to: specific skills needed by employers, language issues, ESL services, drug & alcohol treatment, support services, services to the disabled, education/training needs not provided locally, service to remote areas, space for providing services, etc.*

Utilization of the Strategic Occupational Priority list provides data driven information for career training investment. In addition to the Strategic Occupational Priority List in Region 15, the broader sector engagement work that is occurring with the Columbia Willamette Workforce Collaborative also is providing detailed information about employment demands in health care and manufacturing throughout the Portland Metro area. Gaps exist within the human service delivery system including the ability to pay for support services. The WorkSource staff work diligently and consistently with employers to find ways to bridge the gaps so that employees will be successful. During a time of continued reductions in federal, state and local resources it is difficult to meet all the existing gaps. However, because of the collaborative nature that exists in Region 15, service providers work closely together to pool resources and support job seekers and employers. In order to target services to barriered populations, in addition to the WIA funded providers (IRCO and Community Solutions of Clackamas County), the workforce board works closely with Vocational Rehabilitation, Easter Seals and other partners.

#### **F. STRENGTHS AND IMPROVEMENT OPPORTUNITIES**

1. *Describe how the local board will ensure the continuous improvement of services through the system and ensure that providers meet the employment needs of local employers and job seekers/participants.*

Continued and ongoing monitoring of service providers in Region 15 ensures quality services are being provided to job seekers throughout the year. With regular monitoring, if a gap in the service quality exists, it is caught early and can be corrected. To assure the workforce needs of local employers are being met, Region 15 utilizes the Strategic Occupations List which is updated annually utilizing data collected and analyzed by the research department of the Oregon Employment Department. Limiting the investment of WIA to these specific occupations ultimately benefits the job seeker and the employer. When considering the broader Portland Metro area, the sector strategy work being done through the Columbia Willamette Workforce Collaborative provides in-depth data for the sectors being studied. This work is informed through comprehensive surveys, industry skill panels, forums and informal conversations. This, too, informs investment of WIA formula and competitive funding. Industry feedback is shared with the Business and Employment Services team.

**G. RESOURCES**

1. See attachment B

**H. PERFORMANCE OUTCOMES AND NEGOTIATIONS**

1. See attachment E
2. See attachments E for future years
3. *What barriers does your L/RWIA have which prevents you from integrated performance?*

The biggest barrier to integrated performance measurements is the lack of consolidated information of the two systems. The Oregon Employment Department and Workforce Investment staff enter information into two different data management systems.

**I. BUDGET AND PARTICIPANT PLAN**

1. See attachment E
2. See attachment E

**J. IDENTIFICATION OF ENTITY RESPONSIBLE FOR DISBURSEMENT OF GRANT FUNDS**

Please find the MOA (Attachment 9).

**K. DESCRIPTION OF LOCAL INDIVIDUAL TRAINING ACCOUNT (ITA) SYSTEM AND PROCEDURES**

1. *Describe the local ITA system including:*
  - a) *How is it determined an individual will receive an ITA.*

Located in a metropolitan area with access to a wide variety of private career schools as well as community colleges and four-year institutions, there is an adequate supply of eligible providers available for participants who qualify for ITAs. Region 15 encourages the use of ITAs as well as OJTs to meet both participant and employer needs in the region.

All participants receiving services will have access to the full array of workforce development services within the WorkSource Oregon service delivery system. Referrals to the Skills Team at WorkSource Clackamas are made after a participant has completed the Welcome Process and are based on a request by the participant. Referrals are also made to the other Adult and Dislocated Worker service providers serving specific barriered populations following the same process.

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After the referral to the WIA Skills Team, the participant attends a Gateway session to explore career interests. Service providers serving barriered populations provide career exploration services in a one-on-one setting with the participant. In all cases, if the participant is interested in continuing in the process, they must first be determined to be eligible for the ITA. This includes establishing that the participant was eligible for and received one or more core and intensive service(s) and was determined to be unable to obtain or retain employment through the core and intensive service(s). Service provider staff further determine through an interview, evaluation, or assessment, that the participant is in need of training services and has the skills and qualifications to successfully complete the selected training program. The chosen training program is evaluated against employment opportunities in high-demand occupations listed on the Strategic Occupations List and the participant's ability to obtain grant assistance from other sources is identified.

*b) How an individual who receives an ITA selects a training provider.*

ITAs may be issued only for training for occupations on the Strategic Occupations List and approved training programs on the Eligible Training Provider List. During the Gateway session or one-on-one career assessment meetings, participants are asked to propose their employment goal, training plans, and possible training providers. Workforce specialists then help the participant identify the best possible choice based on cost, location, curriculum, and timelines of the training program.

*c) How payments from ITAs will be made.*

To the extent possible, contractor procedures provide direct payment to the training provider for training costs rather than reimbursement to the participant. ITAs may be used to pay for the costs of a participant's training, including required registration, tuition, fees, books, equipment, disposable supplies, and other required payments.

In order to receive all of the planned ITA payments and any related support payments, participants must maintain satisfactory progress in their training. Satisfactory progress is defined as a level of success in a training program that is generally recognized as acceptable and demonstrating advancement within the program, such as a "C" or a 2.0 grade point average in a traditional academic setting. Satisfactory progress includes meeting all attendance and behavior requirements mandated by the training provider. At mid-term, the service provider staff sends a letter to enrolled participants asking them for a signature from faculty indicating the progress in their coursework. Participants are required to maintain satisfactory progress to continue to receive ITA funding.

*d) Whether there are limits imposed on ITAs (e.g., dollar amount and/or duration) by the Local Board.*

There is no set time limit for the length of training. The appropriateness of a participant's engagement in any short or long-term training is based on the customer's individual needs and situation.

ITAs may be used to pay for the cost of a participant's training, including required registration, tuition, fees, books, equipment, disposable supplies, and other required payments. Although there is no absolute dollar limit on the training cost, an average cost per customer of less than \$2,500 is desirable.

WICCO Policy WIA – 11 Priority of Service specifies the conditions under which the Board would impose limits on ITAs. (Attachment 8)

*e) If limits are imposed on ITAs, how does the local board assure that customer choice in the selection of an eligible training provider is not diminished?*

Customer choice in the selection of a training provider is maximized by providing the individual access to a wide array of information on provider costs, benefits, results, and customer satisfaction data. If jobseekers have additional questions about the process, WorkSource staff are available for one-on-one meetings.

*2. Describe the procedures for ensuring that exceptions to the use of ITAs are justified, including:*

## Section 2: Compliance

- a) *A discussion of how customer choice in the selection of an eligible training provider is maximized;*

If a participant chooses a training not supported by the Strategic Occupations List, exceptions can be granted on a case-by-case basis. A strong reason why an exception would be granted is that the training was chosen in direct partnership with an employer who was willing to hire upon completion of the training.

In exceptional circumstances training providers may be approved who are not yet on the ETPL following CCWD policy 589-30.6.

In all cases, justifications for such exceptions are clearly documented in the participant's Individual Employment Plan.

- b) *A discussion of the local board's intent to use contracts for services in lieu of ITAs for the following exceptions: on-the-job training (OJT) or customized training services; when the local board determines there are an insufficient number of eligible providers in the local area to accomplish the purpose of a system of ITAs; when the local board determines there is a training services program of demonstrated effectiveness offered in the area by a community-based organization or another private organization to serve special participant populations that face multiple barriers to employment;*

It is the Board's intent to align programs with customer needs. On-the-job training (OJT) contracts are used to allow an employer to hire an individual who would not otherwise qualify for the job and to teach the skills needed to perform the position. The activity is based upon a contractual exchange between the employer and the service provider. The service provider reimburses the employer for a portion of the wage during an agreed-upon training time period in exchange for the provision of training by the employer and a commitment to retain the individual when the training is successfully completed.

Region 15 neighbors a large metropolitan area; it has a sufficient number of providers for the ITA system.

The workforce board endorses the use of current local training services that have a long record of demonstrated effectiveness in serving "special populations"—customers who face multiple and serious barriers to employment. At this time, the Workforce Investment Council has not encountered this circumstance.

Section 2: Compliance

- c) *The process to be used in selecting the providers under a contract for services when the local board determines there are an insufficient number of eligible providers in the local area to accomplish the purpose of a system of ITAs. Address whether the process includes a public comment period for interested providers of at least 30 days;*

Not Applicable. It is not likely that there would be an insufficient number of eligible providers in the Metro area. However, if this type of situation were to arise, the competitive bid process definite in policy WICCO-066 Procurement of Goods & Services would be followed. (Attachment 10)

- d) *A brief description of the Local Board criteria to be used in determining “demonstrated effectiveness” for those programs referenced in 2.b (above).*

The Workforce Investment Council staff routinely monitors service provider contracts and contract deliverables. All formula and competitive grant funding including On-the-Job Training and Work Experiences are reviewed regularly to determine the return on investment. Additionally, regular review assures compliance with rules and regulations of the Workforce Investment Act and a detailed list of criteria specified in policies WIA – 17 – On-the-Job-Training, WIA 18 – Customized Training, and WIA – 19 – Work Experience. (See Attachments 11, 12, 13)

**L. DESCRIPTION OF COMPETITIVE PROCESS TO AWARD GRANTS AND CONTRACTS**

1. *Describe the local area’s competitive process for awarding grants and contracts including WIA IB providers. Include a discussion of the procedures for solicitation, selection and award. Identify the procurement requirements that guide the local area’s actions, whether Federal, State, or local.*

The policy that covers the procurement of both goods and services has been adopted in accordance with CCWD State Policy 589-10.11 and 29 CFR 95.40-48.

WICCO-066 Procurement of Goods and Services policy language is attached (Attachment 10).

CODE OF CONDUCT: All Workforce Investment Council procurements must comply with Board Policy WICCO-001 Code of Conduct (Attachment 14).

**M. DESCRIPTION OF LOCAL BOARD COORDINATION OF LOCAL ACTIVITIES WITH STATEWIDE RAPID RESONSE ACTIVITIES**

1. *Describe how the local board ensures coordination of rapid response activities with the state dislocated worker unit. Include policies or procedures which describes:*

## Section 2: Compliance

- a) *How collaboration between the local board, the State, WorkSource Oregon partners, and other applicable entities will occur;*

The local IB contractor for WIA IB Adult and Dislocated Worker services and the partners of WorkSource Oregon provide local rapid response services to employers and workers. The local rapid response team consists of representatives from Clackamas Community College, the Oregon Employment Department, and others as appropriate to each situation. The team follows the CCWD policy 589-20.10 and CFR 665.310-3.20. The local team communicates on an ongoing and regular basis about regional and state activities and attends quarterly statewide Dislocated Worker Liaison training sessions. The local team receives and shares information with Rapid Response liaisons from the Department of Community Colleges and Workforce Development to:

- Identify potential layoff situations
- Track Worker Adjustment and Retraining Notification (WARN) notices
- Establish communications with companies facing closures or layoffs
- Open communications with management and labor, as appropriate
- Conduct pre-layoff surveys of workers
- Conduct on-site information and referral events
- Support labor/management teams
- Provide on-site job search and out-placement services, in coordination with WorkSource Clackamas
- Provide outreach to workers in post-layoff situations

Region 15 follows an eight step process as outlined below.

### Step 1 - Initial Notification of Layoff or Closure

- The local Rapid Response team hears about a notice of layoff or potential layoff from a formal WARN notice, news media, employer, employee or other informal channels.
  - An immediate attempt to contact the employer is made by the Rapid Response Coordinator upon hearing about a layoff to confirm if a layoff is occurring or if it is a rumor (the goal is within 48 hours). This is usually accomplished by a phone call to the company and often followed by a visit. An initial, confidential email is sent to the State Dislocated Worker Unit and all appropriate partners to provide information about the layoff or potential layoff. Follow up information is sent to State Dislocated Worker Unit and partners when appropriate.
- b) *How core services are integrated as part of rapid response assistance, and how delivery on site will be implemented;*

Core services begin when responding during the initial investigation as outlined below.

Step 2 – Investigation

- Contact with the company is made to verify the layoff/closure and gather general information, such as the reason(s) for the layoff(s) or closure; the number of employees involved; union contact information, if applicable and, if there is no union, lead worker information; the expected date of the layoff; and other pertinent information. During this initial contact a brief explanation of pre-layoff services is provided to the company representative and an initial on-site meeting is set up, if possible.
- The Rapid Response Team communicates and determines a strategy for the initial on-site meeting.

Step 3 - Initial On-Site Meeting with Company Representative and Worker Representative

During the initial on-site meeting the Rapid Response Team, employer and employee representatives meet to discuss concerns, initial information session with affected employees, desired services/workshops, potential dates and other possible activities. The handouts and information are reviewed. Determinations are made about other agencies or organizations that will be invited to participate in the Employee Information Session.

Step 4 - Transition Team

A transition team is created. Representatives from the following groups are determined and asked to be part of the transition team.

- Employer representative(s);
- Employee representative(s);
- Local and/or State Liaison(s);
- Union representative (if applicable).

The Transition Team meets periodically during the layoff time frame. They continue to determine, coordinate and set up future workshops and services. Additionally, it is determined if accommodations are available and sufficient to allow the affected employees to complete their iMatchSkills and participate in the Welcome Process on-site. The following tools are used/considered during the meetings, and others are found/determined as needed:

- A. Locally available menu of services;
- B. Compatible software;
- C. Community resources for workers;
- D. Flexibility in times services are offered;
- E. Determine next steps;
- F. Describing one-stop services pre- and post-layoff;

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- G. Employee lists (including names and contact information);
- H. Newsletter;
- I. Packets of information about available DW services;
- J. Peer advisors;
- K. Resource room;
- L. Additional funding;
- M. Training UI Information;
- N. National Emergency Grants (NEGs);
- O. Workers' Compensation;
- P. Refreshments;
- Q. Trade Act petition;
- R. A list of local contacts.

If pre-layoff activities are not feasible/possible, the following steps may be used:

- a. Contact the employer to gain employee contact information in order to distribute:
  - i. Packets
  - ii. Informational Letters
- b. Contact the Employment Department Workforce Promoters – after verification with the employer.

### Step 5 - Employee Survey

Prior to or at the Initial Information Session surveys are distributed to affected employees and collected. These surveys are used to compile demographic information and determine employee concerns and interests.

### Step 6 - Employee Information session

- Information is provided to the affected workers about the services that are available to them to ease the transition to re-employment.
- Information is provided that will aid the worker in recognizing and overcoming various causes of stress, which are common during dislocation events.

### Step 7 - Project Planning

Information gathered from employees, company management, and the union (if applicable) will determine the plan for services to affected workers.

- The transition team and partners develop a plan for pre-layoff services utilizing all information obtained.
- This plan will be emailed to the State Dislocated Worker Unit.

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- The need for additional funding based upon the final plan for services will be developed for the affected workers and submitted to the State when assessed as appropriate with the transition team.

### Step 8 - Employer Feedback – Follow up

- Survey employers after services are provided.
- After layoffs, seek a company referral, including contact information.
- Share information obtained with partners.

*c) How timely decisions will be made to request additional funding through such resources as National Emergency Grants and additional assistance projects.*

The Transition Team determines the potential impact the layoff will have on the local WorkSource Center and WIA funds. The team considers the need for additional funding and decides the appropriate funds to use. The Rapid Response Coordinator, Workforce Team and Workforce Investment Council staff write a grant request if necessary.

## **N. DESCRIPTION OF THE YOUTH PROGRAM DESIGN FRAMEWORK**

*1. Describe the design framework for the local area's youth program including how the design encompasses the following strategies:*

The Workforce Investment Council currently contracts with Clackamas Education Service District (ESD) for youth services. C-TEC Youth Services (a program of Clackamas ESD) manages the administration, data collection, file maintenance, and performance functions of the program. C-TEC also contracts with a training coordinator who plans region-wide training available at no-cost to all enrolled youth. Case management, one-on-one interaction and the strategies listed below are performed by staff at participating high schools, non-profits, and public entities while leveraging funds, time, and buildings to provide services. The framework allows for a wide range of partners and opportunities for youth while leveraging community resources to allow funds to be stretched as far as possible.

*a) Preparation for postsecondary educational opportunities;*

Basic Skills and Education – Activities available include credit recovery opportunities, tutoring, alternative school settings, GED preparation programs, e-learning opportunities, transition and support in continuing into post-secondary education, financial aid assistance, support in obtaining books and other necessary equipment, and academic advising.

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The Basic Skills and Education opportunities provided through C-TEC Youth Services assists many Clackamas County youth in obtaining their high school diploma or GED. Without completing their secondary education, students are unable to apply for state or federal financial aid and are unable to enter some post-secondary educational opportunities.

Another aspect of the youth program design framework includes representatives from Clackamas Community College providing on-site information and advising to students at traditional and alternative school settings, including GED completion program and e-learning environments. C-TEC Youth Services Career Advisors provide on-site individual guidance and counseling to youth transitioning from secondary and GED completion settings to post-secondary educational programs. Guidance and counseling services include individual academic assessments, college placement testing, financial aid and scholarship assistance, career assessments and planning, and internship and career exploration activities.

Early post-secondary education - Collaborating with Clackamas Community College, C-TEC Youth Services is able to offer college credits for several program activities each year, at no cost to the participants. In some situations, dual high school and college credits can be obtained. Introducing youth to college early, and demonstrating that they can be successful, allows many youth to see post-secondary education goals as attainable.

*b) Strong linkages between academic and occupational learning;*

Please see answer below (iv).

*c) Preparation for unsubsidized employment opportunities; and*

Please see answer below (iv).

*d) Effective linkages with intermediaries with strong employer connections.*

WIA IB services for youth are provided through a coordinated network of providers, under the direction of the Region's youth services contractor, Clackamas ESD. In-school and out-of-school youth receive counseling and case management, including assessment and service planning through staff located throughout the County. Staff is located on-site at local high schools, non-profits, the local youth shelter, Clackamas Community College, WorkSource Clackamas, the Housing Authority of Clackamas County, State of Oregon Department of Human Services – Self-sufficiency, Clackamas County Juvenile Department and Oregon Youth Authority.

Occupational Skills – Opportunities include professional technical programs at the high schools, certificate and associate programs at Clackamas Community College (CCC), job

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exploration camps, training through the WorkSkills Lab at CCC, food handlers certification, CPR/First Aid training, short term occupational skills trainings through CCC, and industry/employer led trainings.

Throughout the year tours at local employers are planned for students to get an idea of the types of careers available and the education it takes to acquire the skills. Many of the tours offer hands-on opportunities.

The youth Career Advisors make connections for the youth to local organizations for work experiences, internships, and job shadows. SMART Internships with local employers are available year round and the Summer Youth Academy (SYA) offers additional opportunities during the summer months. This service model incorporates two weeks of training, including soft skills as well as industry-specific training, along with six weeks of on-the-job work experience (often paid) provided by local employers. A strong connection with local employers facilitates these opportunities to link program components with real work experience.

In 2011-12, 50 youth completed the two-week SYA training and 35 youth obtained subsidized training in local Clackamas County businesses through SYA. 10 of those 35 youth obtained unsubsidized employment with their training sites after SYA.

In collaboration with Clackamas Community College, participants have the opportunity to participate in SMART Internships with local employers to gain real world work experience throughout the year. Youth gain college credits and the opportunity to learn in-demand skills with local employers.

In 2012, C-TEC Youth Services was approved by the State of Oregon as an alternative testing site for the National Career Readiness Certificate (NCRC) to support the state's efforts in identifying Certified Work Ready Communities. This allowed for the testing and certification of participants under the age of 18 that were unable to be tested through the WorkSource offices.

2. *Describe how the following ten program elements required in 20 CFR 664.410 are provided within the local youth program design:*

The network of service providers makes sure that all 10 mandated activities are available to youth within Clackamas County. When a youth enrolls in services, they undergo assessment and individual service planning. Through the individual service plan, the providers ensure that the youth accesses any of the 10 activities he or she requires to be successful.

a) *Tutoring, study skills training, and instruction leading to secondary school completion including dropout prevention strategies;*

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Local school districts and Clackamas Community College provide opportunities for credit recovery, tutoring, literacy programs and other academic support to assist enrolled youth in staying in school, advancing their basic skills, and completing their secondary education.

### *b) Alternative secondary school offerings;*

Alternative education opportunities are accessed through a variety of sources depending on the population targeted. Each partnering school district offers alternative secondary school programs, some that can be accessed by youth outside the districts. PACE teen parent program is for pregnant or parenting students in the North Clackamas School District, Oregon City Service Learning Academy (OCSLA) alternative school is a charter school for youth in the Oregon City School District that connects classroom lessons with meaningful service to the community. Milwaukie's Twilight School targets out-of-school youth, Clackamas Community College provides several different programs leading to high school diploma or GED, and New Urban High School is an alternative school that serves youth in the North Clackamas School District.

### *c) Summer employment opportunities directly linked to academic and occupational learning;*

Summer Employment is facilitated through several activities. Weekly employment labs are held at WorkSource Clackamas with follow-up one-on-one appointments available to help youth with resumes, interview preparation, or any other assistance needed to facilitate employment. The staff also compiles and distributes twice-weekly job lists that contain entry-level jobs that are appropriate for young people. The annual Youth Career Fair held in February connects young people with employment, volunteer and educational opportunities.

The Summer Youth Academy offers six weeks of employment for WIA-enrolled youth with local employers in Clackamas County. The job opportunities are tied to specific industries or clusters and offer youth an opportunity to learn on-the-job skills and explore a career interest while earning a stipend and college credits.

### *d) Paid and unpaid work experiences, including internships and job shadowing;*

The youth Career Advisors make connections for the youth to local organizations for work experiences, internships, and job shadows. SMART Internships with local employers are available year round and SYA offers additional opportunities during the summer months. Support also includes announcements of opportunities, assistance in the application process, and entry-level industry trainings. Community Partnerships are established with local subcontractors and occasionally offer paid work experience in collaboration with another business or agency (e.g. Estacada School District will partner with the City of Estacada to provide paid work experiences for enrolled youth).

*e) Occupational skill training;*

Occupational Skills Training takes place at several different levels. In the high schools and community college, professional technical programs provide occupational skills training. They can be a focused program of study, a certificate program, or an associate program. In addition, the youth program coordinates short-term entry-level industry trainings through the year that introduce youth to an industry, allow them to obtain a certificate, and increase their employability. Examples of these trainings include Certified Nursing Assistant, Certified Chiropractic Assistant, Childcare Certification, Oregon State Roadway Flagging, and Forklift Driving Certification.

*f) Leadership development opportunities which may include such activities as positive social behavior and soft skills, decision making, team work, and other activities;*

Leadership development opportunities include: community volunteering, service learning, peer mentoring and tutoring, serving on youth council, community, or advocacy organization boards, life-skills training such as parent education, financial literacy, goal setting and conflict resolution, and leadership training such as how to work in a team, how to run meetings and diversity training.

*g) Supportive services;*

Supportive services include anything allowed by WIA that help a youth be successful. The most common form of supportive services are transportation assistance, books, GED test fees, etc.

*h) Adult mentoring for a duration of at least 12 months that may occur both during and after program participation;*

Adult Mentoring varies given the situation in which youth are enrolled. Some mentoring relationships develop out of the situation in which youth find themselves. Examples include youth in some juvenile justice programs identifying a mentor to support their progress, Alcoholics Anonymous (AA) or Narcotics Anonymous (NA) sponsors, teen parents being mentored by previous young parents, etc. Other mentoring opportunities develop out of partnerships with community. Youth involved in the Summer Youth Academy may develop a mentoring relationship with their internship supervisor. Additionally, referrals may be made to community organizations specializing in mentoring.

*i) Follow-up services;*

After exit, follow-up services are provided for 12 months. At minimum, follow-up services include communication quarterly to determine youth's education or

employment status and provide assistance as needed. Often times, follow-up services look identical to services that occur when a youth is active in the program, only the enrollment status has changed. Youth in follow-up are able to access all the same services provided to youth who are active in the program.

- j) *Comprehensive guidance and counseling, including drug and alcohol abuse counseling and referrals to counseling, as appropriate to the needs of the individual youth.*

All youth enrolled in WIA receive guidance and counseling to determine their needs, plan appropriate activities, re-evaluate goals and activities, and motivate youth to succeed. More intensive or targeted counseling is available as needed and can include referrals for drug and alcohol treatment, group treatment sessions, or one-on-one private counseling.

**O. LOCAL BOARD APPROVAL PROCESS**

1. *Describe the approval and documentation process that will be utilized to obtain formal Board approval of any modification or changes to Attachment E, Budget, Participant and Performance Plan per CCWD policy.*

Board resolutions RS-002 Establishing Signatory Authority and Limitations (see Attachment 15); RS-003 Power to Execute Contracts (see Attachment 16); and WICCO-034 Decision Making Authority of the Full Board of Directors and the Full Board of Directors and the Executive Committee (see Attachment 17) addresses this process for our region.

**P. NOTICE OF FUND AVAILABILITY**

1. *Since funding allocations are provided annually, it is anticipated that the information for the subsequent years will be based on estimated figures when initially submitted. (Areas should use the same funding allocation for planning the subsequent years and be aware this is subject to change when final allocations are issued.) The allocation figures will be revised when they are finalized for the subsequent program years.*

a) *For WIA Title 1-B subrecipients, a Notice of Fund Availability (NFA) will be issued upon approval of the Plan or modification if needed. The NFA serves as an obligation of funds to the subrecipients, not the Local Plan or modifications to the Plan.*

**Q. REPORTING OF CIVIL RIGHTS COMPLIANCE REVIEW, COMPLAINT INVESTIGATION, ADMINISTRATIVE ENFORCEMENT ACTIONS, AND/OR LAWSUITS REGARDING DISCRIMINATION: METHODS OF ADMINISTRATION**

1. N/A
2. N/A

3. Attachment 18

**R. MEMORANDUM OF UNDERSTANDING AND ATTACHMENTS**

Attachment F

**S. RESOURCE SHARING AGREEMENT**

Attachment G

**T. WIA TITLE I-B ASSURANCES AND DISCLOSURE OF LOBBYING ACTIVITIES**

Attachment H

**U. WIA TITLE I-B STATEMENT OF CONCURRENCE**

ATTACHMENT I

**V. WIA TITLE I-B PARTNERS STATEMENT OF AGREEMENT**

Attachment J

**W. LOCAL WORKFORCE INVESTMENT BOARD RECERTIFICATION REQUEST**

ATTACHMENT K

**Customer Information**

Account # 2000081681

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Phone 503-657-6644

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E-mail stacey.hendricks@wicco.org

**Payer Information**

Account # 2000081681

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Oregon City OR 97045 USA

Phone 503-657-6644

PO Number

**Sales Rep.**

kimo

**Ordered By**

Stacey Hendricks

**Ad Content Proof**

**The Workforce Investment Council Proposes Local Unified Plan for 2012-2014**

The Workforce Investment Council (WICCO) receives funds under the Workforce Investment Act of 1998 (WIA) to serve residents (youth, adults, and dislocated workers) and businesses in Clackamas County. WICCO provides individuals with workforce and training services and works with businesses to retain, upgrade or expand their workforce. WICCO's Local Unified Plan for PY2012 - PY2014 is available for public review and comment from September 28, 2012 to close of business on October 29, 2012. Public feedback is an important part of making this plan an effective tool for meeting the needs of businesses and residents in Clackamas County.

A copy of the Local Unified Plan is available electronically at [www.wicco.org](http://www.wicco.org) or upon request at Workforce Investment Council, 365 Warner Milne Road, Suite 202, Oregon City, OR 97045 or email [stacey.hendricks@wicco.org](mailto:stacey.hendricks@wicco.org). Workforce Investment Council of Clackamas County and its partners are equal opportunity employers/programs. Auxiliary aids and services are available upon request to individuals with disabilities. You must contact WICCO at least 72 hours prior to the deadline to request such services. Oregon Relay 711

**Workforce Investment Council of Clackamas County  
Board of Directors Meeting  
April 19, 2012 7:30am – 9:30am  
Clackamas ESD, Mt. Hope Conference Room**



**Members Present**

Ken Bartus, Garron Grounds  
Lisa Brookshier, Pacific Northwest Defense Coalition  
Vickie Burns, Labor's Community Service Agency  
Jerry Buzzard, Department of Human Services  
Janice Chandler, MEC Northwest  
Larry Didway, Oregon City School District  
Gary Furr, J. Frank Schmidt & Sons  
Howard Klink, Klink Consulting  
Pam Meredith, Training and Development Services  
Gary Petersen, Kaiser Permanente  
Tom Previs, Oregon Employment Department  
Jed Scheuermann, Plumbers & Steamfitters Local 290  
Paul Schlumpberger, Pioneer Pump  
Jerry Smith, Jerry Smith & Associates  
Maureen Thompson, Community Solutions for Clackamas County  
Joanne Truesdell, Clackamas Community College  
Frank Wall, Plumbing & Mechanical Contractors Association

**Members Absent**

Ron Britt, Benchmade Knife Company  
Warren Cunningham, Timber Lake Job Corps  
Bob Degnan, Package Containers  
Milt Dennison, Clackamas Education Service District  
Beverly Doolittle, Canby Area Chamber of Commerce  
Brenda Durbin, Social Services  
Cindy Hagen, Clackamas County Economic Development  
Megan Helzerman, Clackamas Education Service District  
Julie Hugo, Blount Int.  
Commissioner Jamie Damon, Clackamas County Board of Commissioners  
Lowell Miles, Miles Fiberglass  
Dan Parker, Marks Metal  
Steve Pickle, Teamsters Local 305  
Dave Riggins, IITR Truck School  
Theresa Taaffe, Portland General Electric  
Dennis Vaughn, Bob's Red Mill Natural Foods  
Micheal Wells, The Cedars Companies

**Others Present**

Bridget Dazey, Workforce Investment Council of Clackamas County  
Jan Filgas, Workforce Investment Council of Clackamas County  
Kim Freeman, Oregon Employment Department  
Dave Griffiths, Data Contractor  
Stacey Hendricks, Workforce Investment Council of Clackamas County  
Ray Hoyt, Clackamas Community College  
Melissa Hunting, Portland General Electric  
Kim Parker, Workforce Investment Council of Clackamas County  
Deb Zang, Workforce Investment Council of Clackamas County

**Call to Order & Welcome**

Chair Frank Wall called the meeting to order at 7:33 a.m.

**Public Comments**

None.

### **Consent Agenda**

Due to not having a quorum of members, the consent agenda will be approved at the June Board meeting.

### **Introductions**

Introductions were made around the room.

### **Data Report**

Dave discussed the YTD data as of 4/19/2012. 7,959 adults and dislocated workers and 405 youth have registered with our WIA program so far this year. He discussed the demographics for adults and characteristics for youth. Dave also explained the success our region has had with on-the-job trainings (OJT) and other various types of training. Our region is either meeting or exceeding all performance measures.

### **Executive Director Updates**

Kim discussed the two federal grants our region has received in partnership with other workforce investment boards in the area. She noted Stacey has taken the lead on a grant proposal to United Way for \$70,000, which would fund additional youth services. 300 organizations have been invited to apply and 30-40 projects will be funded. Kim also discussed the federal grant which would fund services for ex-offenders (with an emphasis on females). Bridget is taking the lead on this grant and 8 projects will be awarded nationwide for \$1.5 million.

Bridget discussed the two workforce innovation grants that our region has applied for in partnership with 1) the state and 2) other regional workforce boards.

Stacey stated that WICCO has also applied to the PGE foundation to fund a portion of the Utility Workforce Readiness program.

Stacey discussed the Summer Youth Academy (SYA) and brought the members' attention to the brochure in their packets. She stated that in addition to the bootcamp and the industry trainings, we will have 40 opportunities for internships for SYA participants. The program will fund the stipends. If anyone is interested in hosting an intern, please let Stacey know.

Kim brought the members' attention to the annual report that is in their packets.

### **Statewide Strategic Planning**

Kim played a video from Governor Kitzhaber addressing local workforce board members emphasizing the importance of statewide workforce development planning and its impact on economic growth, training and jobs in Oregon. Kim stated the governor is committed to breaking down silos in state and federal government and committed to workforce, such as the back-to-work Oregon program. Kim stated Clackamas County does a great job of working together regardless of the funding streams.

The members broke up into three groups. Kim asked each group for feedback on:

- Vision
- Goals
- Outcomes
- Strategies
  - Industry Sectors
  - Work Ready Communities
  - System Innovation

After much discussion and having received feedback from the groups, Kim will compile the information and present to the Executive Committee for further discussion. This information will then be sent to the state.

Attachment 2

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Stacey Hendricks                      Date

---

Frank Wall                                      Date

Meeting adjourned at 9:32 A.M.  
Minutes prepared by Stacey Hendricks

**Workforce Investment Council of Clackamas County  
Executive Committee Meeting  
May 17, 2012**



**Member Attendees**

Lisa Brookshier, Pacific Northwest Defense Coalition  
Robert Degnan, Package Containers  
Howard Klink, United Way of the Columbia-Willamette  
Lowell Miles, Miles Fiberglass  
Dan Parker, Marks Metal Technology  
Jed Scheuermann, UA Local 290 Training Center  
Frank Wall, Plumbing & Mechanical Contractors Association

**Members Not in Attendance**

Ken Bartus, Garron Grounds  
Julie Hugo, Blount, Int.  
Dave Riggins, IITR Truck School  
Jerry Smith, Smith & Associates  
Micheal Wells, The Cedars Companies

**Other Attendees**

Bridget Dazey, Workforce Investment Council  
Jan Filgas, Workforce Investment Council  
Dave Griffiths, Data Contractor  
Kim Parker, Workforce Investment Council  
Deb Zang, Workforce Investment Council

**Chair Frank Wall called the meeting to order at 7:32am.**

**Public Comments**

None.

**Approval of Minutes**

***Motion: Lisa Brookshier moved to approve the November 17, 2011 and the February 16, 2012 meeting minutes as presented, 2<sup>nd</sup> by Dan Parker. Motion passed unanimously.***

**Update on Corrective Action Plan & CCWD Monitoring**

Kim reminded the members that WICCO has been engaged in conversations with the Department of Labor and the state since last August regarding concerns in the National Emergency Grants. These reviews have resulted in placing Clackamas Community College (CCC) on a work plan. CCC has responded with changes in personnel and changes in their system. WICCO received the official letter from the state regarding these National Emergency Grants (Joe's, Cleanpack and Blount/Carlton) and disallowed costs in the amount of \$27,421.17. Clackamas Community College is responsible for the disallowed costs. The college is now looking at these costs which will mostly come out of Clackamas Community College's leveraged funds. WICCO has to have a report back to the state by the end of July. Deb stated everything needs to close out this year.

Kim stated the whole process has made our system better and more efficient.

### **Financial Report**

Deb brought the members' attention to the financial report July – March 2012,  $\frac{3}{4}$  through the year. In terms of revenue, we have brought in what we expected. Deb stated we have received more funding from the On-The-Job training National Emergency Grant due to other regions not meeting their goals and not able to utilize all of their funds. Because our OJT system is working so well, our region will receive an additional \$20,000 to serve more OJT participants.

### **Budget Discussion**

Kim stated we recently received our formula funding numbers from the state for the upcoming year, but the budget committee has not had a chance to meet. She stated we will discuss the big funding picture today and then the budget committee will meet and will recommend a budget at the June Board meeting. Dan Parker, Jerry Buzzard, Jerry Smith and Lisa Brookshier will make up the budget committee.

The formula funding is basically staying the same. The formula from the Feds to the state resulted in a cut to the state. For our region, the funding from the state to us was flat funding. The state follows a certain formula and other regions' funding was cut. The "new secure funding" is what the state has committed to WICCO to receive. There is also secure funding from the competitive grants, Metro STEP and Clean Tech Advance. We also are waiting to hear whether we will receive five other grants: statewide innovation grant, regional innovation grant, United Way, Solutions to Work and PGE Foundation grant.

A lot of funding is coming to an end: National Emergency Grants, ReNW, SESP, and HOPE, which totals about \$1.5 million.

Kim stated at the state level the administration is looking at breaking down silos of various funding streams. Frank discussed aligning Career and Technical education with local employers.

The group then discussed the return on investment and comparing our region to other regions in Oregon.

### **Data Report**

Dave took the members through the data report including enrollments, services, and demographics. Since 7/1/11, the total adult enrollment is 8,179 and 576 youth have been served.

Howard asked if there had been a down-stream return on investment analysis. Dave suggested doing an independent study of individuals who have received services, such as a survey. Kim and Jan stated that they will work on doing this for a better idea of return-on-investment. As far as retention, our performance measures reflect those numbers for adults.

Dave noted that there will be a much better reporting structure in i-trac in the next few months. It should be easier to get more accurate data.

### **Strategic Planning Review**

The April Board meeting was spent on a strategic planning review at the request of the state of Oregon Workforce Investment Board, which is working on a statewide strategic plan. There was discussion and feedback from Board members on the vision, goals, outcomes and strategies. Kim created a new recommended document to incorporate WICCO's work plan and the feedback from April's board meeting. She stated there are not huge changes, but some tweaks to our current strategic priorities. Kim took the members through these changes and

additions to the strategic plan. With feedback she received from the Executive Committee, she will bring this document to the full Board in June.

\_\_\_\_\_  
Stacey Hendricks                      Date

\_\_\_\_\_  
Frank Wall    Date

Minutes prepared by Stacey Hendricks  
Meeting adjourned at 9:00 am

**Workforce Investment Council of Clackamas County  
Executive Committee Meeting  
September 20, 2012**



**Member Attendees**

Lisa Brookshier, Pacific Northwest Defense Coalition  
Robert Degnan, Package Containers  
Howard Klink, United Way of the Columbia-Willamette  
Lowell Miles, Miles Fiberglass  
Dan Parker, Marks Metal Technology  
Jed Scheuermann, UA Local 290 Training Center  
Jerry Smith, Smith & Associates

**Members Not in Attendance**

Ken Bartus, Garron Grounds  
Julie Hugo, Blount, Int.  
Dave Riggins, IITR Truck School  
Frank Wall, Plumbing & Mechanical Contractors Association  
Micheal Wells, The Cedars Companies

**Other Attendees**

Lori Bailey, Workforce Investment Council  
Bridget Dazey, Workforce Investment Council  
Jan Filgas, Workforce Investment Council  
Gary Furr, J. Frank Schmidt & Son  
Dave Griffiths, Data Contractor  
Kim Parker, Workforce Investment Council  
Deb Zang, Workforce Investment Council

**Vice Chair Lisa Brookshier called the meeting to order at 7:31am.**

**Public Comments**

None.

**Approval of Minutes**

***Motion: Lowell Miles moved to approve the May 17, 2012 meeting minutes as presented, 2<sup>nd</sup> by Dan Parker. Motion passed unanimously.***

**Strategic Planning Update**

Kim reminded the members of the strategic planning that took place at the April Board meeting. She stated the Workforce Investment Council's strategic priorities will be updated. Staff is working with partners to complete strategic planning and update the Local Unified Plan (LUP), which is a combination of big picture planning that includes sector strategies, certified work ready communities and looking at system innovation, as well as compliance for WIA. The LUP has to be published for public comment for 30 days and it is due to the state on October 31<sup>st</sup>. The entire package will be reviewed at the next Board meeting.

**Financial Report**

Deb brought the members' attention to the yearend financial report that ended June 30, 2012. Deb stated we did well. We brought in \$625,000 more than expected due to carry forward and





**WORKFORCE INVESTMENT COUNCIL OF CLACKAMAS COUNTY  
BUSINESS SERVICES/TRANSITIONAL WORKFORCE COMMITTEE MEETING  
Thursday, June 7, 2012 11:45am – 1:00pm  
Workforce Investment Council Office  
Minutes**

**Committee Members Present:** Jerry Smith, Pam Meredith, Maureen Thompson, Tom Previs, Cindy Hagen, Ray Hoyt, Bev Doolittle

**Workforce Investment Council Staff Present:** Jan Filgas, Kim Parker

Jerry Smith called the meeting to order at 11:45am.

**Public Comments:**

None.

**Minutes:**

***Maureen Thompson moved to accept the 4/5/12 meeting minutes. Tom Previs seconded the motion. Motion passed unanimously.***

**Work Plan Update**

Jan reported out on the status of WICCO's annual work plan goals and noted that we are on target with the work plan's deliverables overall.

**OJT Participant Impact Study**

Kim stated that at the last Executive Committee meeting a conversation occurred about the return on investment of our OJTs. As a result, a survey will be developed and sent out to OJT participants asking them about their experience in the OJT, if they are still working in the same job, if they are in another job, if they are making more money, etc. Ray Hoyt suggested also surveying the employers to see how the experience was for them. This will help us moving forward as we fund more OJTs in the future.

Kim also said that there will be no more OJT exception requests because there is such a demand for OJTs now.

**Update on Strategic Priorities**

Kim reported that the State Workforce Investment Board (OWIB) is in the process of updating their strategic plan and are engaging the locals much more intensively than in the past. In April the Board participated in a discussion to inform this process and during that discussion, reprioritized WICCO's 4 strategic priorities. This change went before the Executive Committee and will go before the big Board this month.

**Regional Engagement:**

Kim reported that we are continuing to work closely with partner WIBs in Portland Metro and SW Washington to address industry needs as a greater region. This is an effort to better serve our employers. The WIBs recognize that we are one big labor shed and

Workforce Investment Council 365 Warner Milne Road, Suite 202, Oregon City, OR 97045  
Ph: 503.657.6644 / Fax: 503.657.6770 / [www.wicco.org](http://www.wicco.org)

want to make decisions regarding training investments in a coordinated fashion so that we are not flooding the market with trainees that aren't in demand. The two industries that are being looked at right now are health care and manufacturing.

There is a draft of the healthcare report that just came out that will be a wealth of information as we move forward with training investments in our region. Regarding manufacturing, WICCO is co hosting (with SW Washington and WSI) a 2-hour manufacturing event at the Convention Center on June 22 from 7:30 to 9:30AM. Manufacturing employers have been invited and will be informed about the grant funds that have come into our region and to participate in feedback sessions on their needs as an industry. Senator Merkley will also be attending.

### **SESP Monitoring**

Jan reported that Marian Esver, the Federal Project Officer from DOL, came out to monitor our region's SESP grant in late May. Marian was impressed with how much our region has improved over the last year and found no issues in our region regarding the delivery of SESP grant services. While she was here Marian did case file reviews, some fiscal monitoring, interviewed participants and visited one of our training sites, Earth Advantage. Jan specifically called out Ray Hoyt, Carrie Kraten, Skye Feltz, Kim Hikade and Angie Torkko for all of the work they did to prepare for and to make the visit successful.

### **Update on Contract Negotiations for PY 12-13**

Kim reported that we are in the process of negotiating contracts with our service providers: CCC; IRCO serving people who have English as a second language; Community Solutions serving long term unemployed, people with criminal backgrounds and mental health issues; Express Personnel who conduct workshops; and our youth contractor. Their contracts will not be reduced because we were evenly funded this year.

WICCO will need to go out for RFP for our primary A/DW provider early next year and Kim reminded the group that they will be the key committee to support this work.

Ray reported that CCC's Workforce Department is moving to a new location on campus and will now be in the Family Resource Center building. The move will consolidate staff into one location, provide lots of office space and has 2 ½ classrooms, good storage, good access and great parking.

### **Meeting Adjourned:**

Jerry Smith adjourned the meeting at 12:50pm.

**Clackamas Board of County Commissioners**  
**PURPOSE:** Appoint WIB members and oversee regional workforce efforts.

**Workforce Investment Council**  
**MISSION:** Develop a highly skilled workforce that creates sustained economic prosperity in Clackamas County.  
**ROLES:** Advocacy for the system; system quality and outcome evaluation; policy decisions; strategic direction/decisions

**One Stop Operator**  
**PURPOSE:** oversight of region's one-stop system.  
**Members:** A consortium comprised of, but not limited to, the principal investors in the region's WorkSource One Stop Center.

**Executive Committee**  
**PURPOSE:** Provides oversight and direction on overall objectives and budget for the WICCO.  
**ROLES:** Contractual decisions; service delivery model decisions; budget/audit decisions; programmatical decisions

**Budget & Audit Committee**  
**PURPOSE:** Provides oversight for the budget and audit.

**Express Employment Services**  
Workshop Provider

**Emerging Workforce Committee**  
**PURPOSE:** Develops a pipeline of workers for Clackamas County and its high growth businesses.

**Business Services Committee**  
**PURPOSE:** Creates innovative strategies to help businesses meet their workforce needs.

**Clackamas Education Service District**  
Youth Provider

**Clackamas Community College**  
Adult/Dislocated Worker Provider

**Community Solutions for Clackamas County**  
Adult/Dislocated Worker Provider

**Immigrant and Refugee Community Organization**  
Adult/Dislocated Worker Provider

**Workforce Investment Council of Clackamas County  
Executive Committee  
May 15, 2008**

**Member Attendees**

Ken Bartus, Garron Grounds  
Lowell Miles, Miles Fiberglass  
Kathy Richardson, Willamette Falls Hospital  
Dave Riggins, ITR Trucking  
Chip Sammons, Holistic Pet Center  
Commissioner Martha Schrader, Clackamas County  
Jerry Smith, Smith & Associates

**Absent Members**

Janice Chandler, PCC Structural

**Other Attendees**

Mike Biery, Benchmade Knife Company  
Amber Briney, Timber Lake Job Corps  
Rick Dawes, Enoch Manufacturing  
Terri Houde, Workforce Investment Council of Clackamas County  
Leslie Palmer, Workforce Investment Council of Clackamas County  
Maureen Thompson, Community Solutions for Clackamas County  
Jerry Turner, Pioneer Pump, Inc.

**Chair Kathy Richardson called the meeting to order at 7:30 a.m. Welcome and introductions were made.**

**Public Comments**

There were no public comments.

**Minutes**

***Motion: Lowell Miles moved to approve the April 3, 2008 Executive Minutes as presented, 2<sup>nd</sup> by Dave Riggins. Motion passed unanimously.***

**Discussion:**

Maureen Thompson asked how much of the \$154,000.00 rescission was Adult, Dislocated Worker and Youth and which program was hit the hardest. Terri Houde stated the amount was calculated by formula for each program but she could not provide an actual breakdown for Maureen.

**Slate of Officers and Executive Committee Members for July 2008 –June 2009**

Kathy Richardson advised this would be the second call for nominations for slate of officers as well as adjunct members for the Executive Committee.

Rick Dawes nominated Lowell Miles as an adjunct member of the Executive Committee. Lowell stated he would give this nomination some thought and advise Terri Houde prior to the June 19<sup>th</sup> Board Meeting. Terri stated current adjunct members who include Dave Riggins, Chip Sammons and Ken Bartus have all agreed to stay in their position which means one more adjunct member would be needed.

## **Request for Proposal Adult & Dislocated Worker Services**

Ken Bartus, Chair of the RFP committee for the Adult & Dislocated Worker Services Program advised the Executive committee the RFP committee met on May 8, 2008 to review and score proposals for the Adult & Dislocated Worker Services. Ken advised the RFP committee does have some clarifications before letter of intent to award is issued and these items should be clarified on May 19, 2008. The RFP committee proposed a phased approach to reach final contract as follows:

### Phase 1 – Clarifications [May 19 – June 6]

RFP committee to meet with Clackamas Community College and proposed sub-contractors to discuss cost, scope of work and outcomes of each sub-contractor. Request Executive Summary to outline WIA specific activities with budget summary.

### Phase 2 – Negotiations [June 9 – June 20]

Including budget, scope of work, cost per participant, and performance. Will include a clause for innovation and performance dashboard to measure outcomes.

Phase 3 – Contract signing and implementation [last day to sign June 30, 2008] in summary.

The RFP Committee is recommending the WICCO Executive Committee to approve the proposed 3 phases above in order to proceed with the proposal clarifications and contract negotiations and issue a notice of intent to award to Clackamas Community College.

***Motion: Jerry Smith moved to approve recommendation presented by Ken Bartus, Chair, RFP committee to move forward with obtaining clarifications and continue with the intent to award Adult & Dislocated Worker Services contract to Clackamas Community College, 2<sup>nd</sup> by Lowell Miles. Motion passed with two abstentions from Maureen Thompson and Commissioner Martha Schrader. The motion was approved.***

## **2008 – 2009 Budget Review**

Terri Houde presented PY08-09 Draft Budget to the Executive Committee and asked for recommendations before presenting to the full board on June 19, 2008. Terri advised the committee in lieu of the funding cuts, she was able to negotiate the Oregon Workforce Partnership membership dues to \$10,000.00 annually instead of \$14,000.00.

### *Discussion:*

- Question asked regarding lease costs under Administration-why ¾ lease costs?
- Answer: ¼ will come from program for lease costs
- Suggestion was made to hold funds out for another possible rescission
- With regards to the National Association of Workforce Boards (NAWB), suggestion was made to reserve hotel rooms upfront and decide who will attend later
- Suggestion made that members who are private industry should contribute money so more members can attend NAWB

Terri Houde further advised due to changes at the Oregon City One-Stop, the \$45,000.00 is no longer required to fund the coordinator at the One-Stop. Robert Brown, Interim Manager of the One-Stop has requested permission to use the \$45,000.00 to help redesign the One-Stop signage along with other renovations. Rick Dawes requested that the WICCO obtain a proposal from Robert Brown outlining costs before committing this money. If the proposal is less than

\$45,000.00, difference will go back to the programs or put aside for future use at the One-Stop or somewhere else.

***Action Item: Terri Houde to obtain proposal from Robert Brown outlining improvement costs.***

### **Submission of Integrated Service Model**

Terri Houde gave an overview of the Integrated Service Model that was including in the committee packet and went over the board's role and responsibilities per the integration policy:

1. Requires that Local Workforce Boards convene the partners and are accountable for the development of an integrated service delivery system with Oregon Employment Department and the Local Workforce Board.
2. Local Workforce Boards will adopt, implement, and continuously improve the local demand driven, skill based integrated services.
3. Local boards have the responsibility for overseeing the success of the local integrated system as defined in the state approved local integrated services plan.

*Discussion:*

- Suggestion to use Job Keys along with iMatch

Terri Houde stated that there will be an assessment tool in every One-Stop and the State of Oregon has a RFP out for the assessment tool.

***Motion: Ken Bartus moved to accept the Integrated Service Plan as presented, acknowledging that language may be edited based upon feedback from the State of Oregon, 2<sup>nd</sup> by Lowell Miles. The motion passed unanimously.***

***Motion: Jerry Smith moved to accept the change in branding from the Oregon City One-Stop to WorkSource Clackamas, 2<sup>nd</sup> by Lowell Miles. The motion passed unanimously.***

### **Audit Results of Contract Monitoring for PY06-07**

Terri Houde stated the purpose of contract monitoring is to ensure that the requirements of the contracts for Adult & Dislocated Worker and Youth Services are being met as described in the scope of work and that all activities, operations, facilities and administrative processes are in compliance with WIA requirements.

There were four (4) findings for Clackamas Community College with regards to the Adult & Dislocated Worker contract which included data not being submitted to the State, program exit, disallowed costs and using WIA dollars were being used in the Customized Training program. All have been resolved with exception of the Customized Training and Clackamas Community College was informed customized training services may not resume until WICCO has been satisfied that the process has proper risk management guidelines in place.

The monitoring for Clackamas Education Service District has not been closed as the Youth provider's program manager resigned and until a new program manager has been hired, this will remain open.





**POLICY #:** WIA-11  
**TITLE:** Priority of Service Delivery

**Issue Date:** November 14, 2002  
**Revision Dates:** April 4, 2003  
September 20, 2007  
October 2, 2009

### **PURPOSE**

Local Workforce Investment Boards must determine whether funds allocated to serve eligible Adults under WIA are limited for the program year. This policy articulates the process for making this determination and how priority of service for WIA Adults is to be applied in the event that regular WIA Adult formula funds are determined to be limited.

### **REFERENCES**

- WIA Section 134(d)(4)(E)
- 20 CFR Part 663.600
- 20 CFR Part 1010
- CCWD WIA Title IB Policy #589-30.7

### **POLICY**

#### **Making the Determination:**

At the onset of the program year, the WIA Adult Service Provider will furnish WICCO with the approximate cost of providing employment and training services for WIA Adult participants and the number of Adult participants they anticipate serving with WIA Adult formula funds. During the program year, the WIA Adult Service Provider must notify WICCO when 85% of WIA Adult formula funds are obligated.

In making the determination that WIA Adult funding is limited, WICCO will take into consideration the availability of any other public or private resources available to fund employment and training activities in Workforce Region 15. WICCO will also consider the current economic conditions including unemployment statistics, labor market information, and past expenditure trends in WIA Adult employment and training activities.

**Priority of Service:**

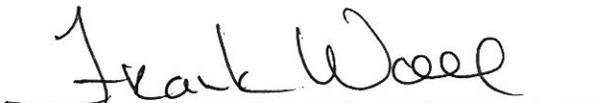
In the event WIA Adult formula funds are determined to be limited, priority to receive intensive and training services is as follows:

1. First priority shall be given to Veterans and/or eligible spouses residing in Clackamas County who are recipients of public assistance or are low income individuals.
2. Second priority shall be given to recipients of public assistance and other low-income individuals residing in Clackamas County.
3. Third priority shall be given to veterans and/or eligible spouses residing in Clackamas County.
4. Forth priority shall be given to Clackamas County residents.

**PROCEDURE**

1. The WIA Adult Service Provider notifies WICCO when 85% of WIA Adult formula funds are obligated in a program year.
2. Depending when in the program year the Adult funds have been obligated, WICCO restricts any unobligated expenditures.
3. WICCO considers available employment and training funding, current economic conditions, and expenditure trends in employment and training activities to determine whether WIA Adult funds are limited.
4. WICCO notifies the WIA Adult Service Provider and the WorkSource Clackamas Leadership team when Adult funds are determined to be limited.
5. The WIA Adult Service Provider prioritizes funds and the WorkSource Clackamas Leadership team notifies staff the area is in "Priority of Service" status.
6. The WIA Adult Service Provider Operations Manager communicates to the Skills Team the status of Adult funds and expenditures.
7. After entering Priority of Service status, WICCO may determine Adult funds are adequate for intensive and training services for the remaining program year and rescind Priority of Service status.

**Approved:**

  
\_\_\_\_\_  
WICCO Board Chair

  
\_\_\_\_\_  
Date

## MEMORANDUM OF AGREEMENT

Between: Clackamas County,  
A Political Subdivision of the State of Oregon  
2051 Kaen Road  
Oregon City, OR 97045

And: Workforce Investment Council of Clackamas County, Inc.  
An Oregon Nonprofit, Public Benefit Corporation Without Members  
365 Warner Milne Road, Suite 202  
Oregon City, Oregon 97045

This agreement is made and entered into by and between Clackamas County, Oregon, ("County"), and the Workforce Investment Council of Clackamas County, Inc., ("WICCO"), pursuant to the Workforce Investment Act of 1998.

### RECITALS:

- A. WHEREAS, the Workforce Investment Act of 1998, Public Law 105-220, ("WIA") requires the establishment of a local Workforce Investment Board in each local area of a state and authorizes the expenditure of federal funds for job-training and workforce development programs in locally determined Workforce Investment Areas; and
- B. WHEREAS, the County constitutes a jurisdiction eligible for designation as a Workforce Investment Area (Region 15) in which WICCO serves as the local workforce board; and
- C. WHEREAS, WIA establishes a partnership between the Local Workforce Investment Board and the Chief Elected Official to preserve local control and decision making in workforce development; and
- D. WHEREAS, the Board of County Commissioners of County (BCC) serves as the chief elected official of County and under WIA is liable for WIA grant funds; and
- E. WHEREAS, the partnership between WICCO and County is part of a statewide workforce development system and is subject to approval and certification by the Governor of the State of Oregon; and
- F. WHEREAS, the State of Oregon policy governing this partnership seeks to establish collaboration between the partners in order to carry out strategies and policies that build on statewide investments;

Attachment 9

NOW THEREFORE, Be it resolved that this Agreement pursuant to WIA and the State of Oregon's workforce development system is made and entered into and between County and WICCO.

A. Compliance with Laws.

WICCO and County shall operate in compliance with all applicable federal, state and local statutes, ordinances, rules, regulations and other laws.

B. Roles and Responsibilities.

1. County. County shall be responsible for the following:

- a) Appointing WICCO board members (WIA Section 117(c)(1), including at least one member of the BCC to serve on the WICCO board;
- b) Serving as the local grant recipient (WIA Section 117(d)(3)(B). This duty is hereby delegated to WICCO in accordance with WIA section 117(d)(3)(B)(i)(II) and section 1.B.2.(c) of this Agreement (below); and
- c) Providing one employee of County with expertise and experience in WIA grant accounting and administration to serve on the WICCO audit committee.

2. WICCO. WICCO shall be responsible for the following:

- a) Serving as the local program administrator;
- b) Maintaining WICCO's status as a non-profit organization;
- c) Serving as grant sub-recipient pursuant to the delegation described in section 1.B.1.(b) of this Agreement (above), receiving and disbursing funds made available to Region 15 - Clackamas County under the Workforce Investment Act, and:
- d) Developing a WIA budget for the purpose of carrying out WICCO's duties, subject to the approval of County (WIA Section 117(d)(3)(A)).

3. Implementation.

- a) As the Local Workforce Investment Board, WICCO agrees to operate in compliance with the WICCO Articles of Incorporation and Bylaws.
- b) WICCO and County agree to operate in compliance with the Region 1 5 Local Unified Plan adopted pursuant to the WIA, as amended from time to time.
- c) WICCO agrees to provide a written report to the BCC annually, summarizing the results of the annual monitoring review by the State, which includes a compliance review of administrative, fiscal and program systems.
- d) WICCO agrees to provide thirty (30) day's written notice to the BCC of any proposed changes to WICCO's Bylaws. The notice shall be mailed to the Office of Clackamas County Counsel by certified mail, return receipt requested, and shall be deemed delivered on the earlier of: (i) three (3) business days after mailing, or (ii) the date of actual receipt as marked on the US Postal Service return receipt.

WICCO agrees that any proposed change to WICCO bylaws that the BCC objects to may not be made until the BCC concurs with the proposed bylaw change.

- e) WICCO agrees to receive WIA grants and other grants in its own name and be responsible for the development of grant programs, expenditures and accounting for all funds that WICCO receives. WICCO further agrees to deliver or procure services pursuant to the grants.
- f) WICCO agrees to establish and maintain an audit committee and maintain as a member of the committee the County employee described in section I.B.1.(c) of this Agreement (above).

The audit committee shall:

- i. Prepare or supervise the preparation of all financial statements and other official financial information provided to the public;
- ii. Design and implement systems of internal controls to ensure WICCO compliance with applicable laws, policies and procedures and appropriate risk management measures;
- iii. Facilitate an annual independent audit process, including engaging an independent certified public accountant and receiving all reports from the accountant; and

- iv. Issue an RFP for audit services every three to five years using federal procurement guidelines.
- g) WICCO agrees to procure such independent audits as are required under state and federal law or as WICCO deems both necessary and beyond what is required by state or federal law.
- h) WICCO's authority to administer job-training/workforce development programs and services is not limited to those services authorized by WIA, and WICCO may receive any available funds that are unrelated to WIA.
- i) WICCO shall maintain and use its own federal employer identification number (EIN) for all of its financial transactions. WICCO shall maintain its own bank accounts and direct the investment of its funds. As a non-profit organization, WICCO shall serve as fiscal agent for all funds received under its EIN and is responsible for all audit and tax filings under its EIN.

## II. Conflict Resolution

### A. Informal Negotiations.

In the event County and WICCO cannot agree on an issue where their agreement is required by this MOA or state or federal law, the County Administrator or designee and WICCO designee shall first attempt to resolve the disagreement.

### B. Formal Negotiations.

If a resolution is still not reached, a representative chosen by the BCC and a representative chosen by WICCO shall meet and attempt to resolve the disagreement.

### C. Resolution Committee for Further Negotiation.

If negotiations are unsuccessful, a Resolution committee will be formed with one member designated by WICCO, and a second member designated by County. The two members shall designate a third member. These three persons shall be known as the "Resolution Committee". The Resolution Committee shall promptly meet to discuss and resolve any dispute by majority vote. Decisions of the Resolution Committee shall be rendered within thirty (30) days after the Committee is appointed and shall be binding upon WICCO and County.

### D. Alternative Means for Selection of Third Committee Member.

In the event a third member of the Resolution Committee cannot be agreed to by the two members of the Resolution Committee so chosen, the Director of Workforce Development

programs for the State of Oregon (currently the Director of Department of Community Colleges & Workforce Development 255 Capitol Street NE, Third Floor, Salem, Oregon 97310) or any replacement or substitute appointed as a result of legislation that replaces WIA, shall be asked to appoint the third member.

E. Other Remedies.

If the Resolution Committee is unable to resolve the matter, each party shall have recourse to any remedy provided by law.

III. **Liabilities**

A. Director's and Officer's Insurance.

WICCO shall purchase insurance to prudently protect itself, its directors and officers against liabilities. Such insurance policy shall include Audit Exception and/or Errors and Omissions coverage as agreed to by WICCO and County. The policy shall name County as an additional insured and shall include a provision for the insurer to notify County prior to canceling the insurance coverage.

B. General Liability Insurance.

WICCO shall purchase a policy of general liability insurance. The policy shall always be at least equal in coverage to the amount of liability of a public body for any number of claims arising out of a single accident or occurrence as set forth in the applicable provision of the Oregon Tort Claims Act. The policy shall name County as an additional insured and shall include a provision for the insurer to notify County prior to canceling the insurance coverage.

C. Indemnification.

WICCO shall defend, indemnify and hold harmless County from all liability arising out of WICCO's conduct including its conduct as a program administrator and Workforce Investment Board in the administration of job-training and workforce development services, except to the extent that county's liability is the result of its own negligence or results from County being held liable by the State of Oregon under WIA (or any replacement federal job-training/workforce development legislation) for County's actions. The County shall similarly indemnify WICCO to the extent permitted by Oregon Law.

WICCO shall require its contractors to assume responsibility and to indemnify WICCO and County for liabilities arising from contractor activities. The parties hereby recognize that some of the contractors may be entities or agencies that are bound by debt and indemnification limits

set forth in the Oregon Constitution. The parties therefore agree to require indemnification from such entities or agencies to the fullest extent permitted by Oregon law.

D. Maintenance of Reserve Fund.

To the extent WICCO receives unrestricted moneys that may lawfully be held in a reserve fund, WICCO shall, before otherwise committing the moneys, deposit ten percent (10%) of the moneys in a Reserve Fund in an amount that may not exceed \$250,000. The Reserve Fund shall be held for the purpose of making reimbursements for misapplied WIA grant funds.

E. Liability Priority.

In the event liability for WICCO expenditures or operations occurs, the following priorities apply:

1. First Priority: WICCO shall attempt to recover funds from the contractor, agent or third party causing the liability.
2. Second Priority: WICCO shall attempt to recover funds from insurance described above.
3. Third Priority: WICCO shall repay the liability from the Reserve Fund described in section III.D. of this Agreement (above).
4. Fourth and Final Priority: As a last resort and only to the extent required by the WIA or other federal or state law, County shall repay any otherwise unpaid liability.

**IV. Duration and Amendment**

A. Effective Date and Duration.

This Agreement is effective upon the date of the last signature by a party and shall remain in effect until June 30<sup>th</sup>, 2013. As of July 1, 2013, the agreement shall remain in effect until it is terminated by:

1. Either party as set forth in Section V. of the Agreement (below);
2. Operation of law; or
3. Execution of a subsequent Memorandum of Agreement by both parties that supersedes the Agreement.

B. Amendments.

Any amendment to this Agreement must be in writing signed by both parties and must make specific references to this Agreement. Upon the request of either party, the parties shall enter into discussions with the other concerning amendment to this Agreement.

C. This Agreement Supersedes Prior Agreements.

This writing is intended both as the final expression of this Agreement between the parties with respect to the included terms and as a complete and exclusive statement of the terms of this Agreement. Except as provided in section I.A. of this Agreement (above), all prior Agreements on the same subject matter are superseded by this Agreement.

**V. Termination**

A. Pre-Requisites to Termination Generally.

Except as otherwise provided herein, any termination of this Agreement by either party after June 30, 2013, shall be effective as of June 30<sup>th</sup> of any subsequent year, if written notice of the intent to terminate has been given to the non-terminating party no later than January 15<sup>th</sup> of that same year.

B. Termination for Cause by Either Party.

Notwithstanding any other provision of this Agreement, either party may terminate this Agreement effective 90 days after written notice is given in compliance with this subsection, as follows:

1. If a party violates section I.A. of this Agreement (above), and the other party gives written notice of intent to terminate after 90 days, specifying the non-compliance, and specifying that the violating party has 45 days to cure the noncompliance to prevent termination.
2. If the violating party fails to cure the violation to the satisfaction of the other party in the 45 day period provided for in a written notice, this Agreement will terminate on the 90<sup>th</sup> day after that notice was sent by first class and certified mail, return receipt requested. Provided, however, that the terminating party may not terminate this Agreement after 90 days if the violating party can show that it has undertaken substantial action that is expected to cure the violation within a period of time that is reasonable under the circumstances.

C. Termination by BCC for Performance Issue.

County and WICCO understand that the goals set forth in the Recitals on page one of this Agreement can only be achieved if WICCO maintains a level of performance that satisfies Workforce Investment Act State supervisory officials. In order to secure a place for County in the monitoring and correction of poor performance by WICCO, the following requirements are made a part of this Agreement:

1. If WICCO performance falls below 80% for the first year, WICCO will take the following actions as a Board:
  - a) In October, make a written report to the BCC that a performance measure(s) has been missed.
  - b) Meet with the contractor(s) to assess why the performance measure(s) was not met and create a written performance improvement plan.
  - c) In February or March, contact the State of Oregon Department of Community College and Workforce Development for Performance Improvement Plan funds to assist with implementation of the Performance Improvement Plan.
  - d) The following October, follow up in writing with the BCC on the results of the Performance Improvement Plan.
2. If WICCO performance remains below 80% in the same performance standard for a second consecutive year, WICCO will take the following actions as a Board:
  - a) In October, make a written report to the BCC that a performance measure(s) has been missed for two consecutive years.
  - b) Meet with the contractor(s) to assess why the performance measure was not met again and create a written corrective action plan.
  - c) In February or March, contact the State of Oregon Department of Community College and Workforce Development for Performance Improvement Plan funds to assist with implementation of the Corrective Action Plan.
  - d) The following October, follow up in writing with the BCC on the results of the Corrective Action Plan.

## Attachment 9

3. If performance remains below 80% in the same performance standard for a third consecutive year, WICCO will take the following actions as a Board:
  - a) In October, report to the BCC and the State that a performance measure(s) has been missed for a third consecutive year.
  - b) Meet with the contractor(s) to assess why the performance measure has not been met. Call a special meeting of the WICCO Board, the BCC and the State of Oregon Department of Community College and Workforce Development (CCWD) and the Governor's Staff.
  - c) Review historical data and follow the recommendation of CCWD and the Governor's Staff. These are the considerations and options of CCWD and Governor's Staff:
    - i. Review historical data and make a determination if course corrections are adequate and grant additional year of correction action plan.
    - ii. Require other appropriate measures designed to improve the performance of the local area.
    - iii. Prohibit use of a particular service provider or One-Stop partner that has been identified as achieving poor levels of performance.
    - iv. Appoint and certify a new Local Board.

After the special meeting described in section V.C.3(b) of this Agreement (above), County may send a 90 day notice of termination for cause to WICCO. This Agreement will terminate on the 90<sup>th</sup> day after that notice was sent by first class and certified mail, return receipt requested. A copy of that notice of termination letter will be provided to the State Office of Community College and Workforce Development and the Governor's Staff, contemporaneous with the mailing of the notice to WICCO.

**MEMORANDUM OF AGREEMENT**

**Between**

The County of Clackamas County, Oregon

**And**

The Workforce Investment Council of Clackamas County, Inc.

**Signatures**

**For the BOARD OF COUNTY COMMISSIONERS**

  
\_\_\_\_\_  
Commissioner Lynn Peterson, Chair

6-17-10  
Date

  
\_\_\_\_\_  
Mary Raethke, Recording Secretary

6-17-10  
Date E.I.

**For the WORKFORCE INVESTMENT COUNCIL OF CLACKAMAS COUNTY**

  
\_\_\_\_\_  
Kim Parker, Executive Director

6-17-10  
Date

  
\_\_\_\_\_  
Frank Wall, Chair

6/23/10  
Date

**POLICY #: WICCO-066**  
**PROCUREMENT OF GOODS & SERVICES**

**Issue Date:** November 14, 2002  
**Revision Date:** September 7, 2006; April 21, 2011

**PURPOSE:**

This Policy provides guidance on the procurement and purchase of goods and services for program or administrative needs. The intent of this policy is to ensure open competition while securing the best possible price.



See WICCO Office Procedures Manual – Procurement for specific procedures and forms.

**REFERENCES:**

- WIA Sec.184(a)(2)(A)
- 20 CFR 667.200(a)(1)-(7)
- 29 CFR 95.40-48
- TAG Ch II-10
- CCWD 589-10.11

**POLICY:**

The Board of Directors, through approval of the annual working budget and Region 15 Local Unified Plan, must approve all funds expended by the Workforce Investment Council. See also *Board Resolution RS-0002 Power to Execute Contracts*. Staff will ensure fiscal accountability and prevent fraud and abuse by acting in accordance with procurement standards.

At a minimum, procurements will include the following:

- A. Be conducted in a manner that provides fair and open competition regardless of method or dollar amount. Conduct appropriate analysis to determine which procurement method will be the most economical. Avoid purchasing unnecessary or duplicate items.
- B. Document applicable cost/price and lease vs. purchase analysis when appropriate for every procurement action. Minimize the use of sole source procurement and justify it in every case.
- C. Solicitations for goods and services will include
  - i. Clear and accurate written descriptions of the requirements for the goods or services to be procured,
  - ii. Criteria for contractor selection or rejection,
  - iii. Written protest procedure, negotiation procedure and settlement process.
- D. Contracts will be awarded to responsive and responsible bidders who possess the potential ability to perform successfully under the terms and conditions of the procurement. Small businesses, minority-owned firms, and women's business enterprises will be used to the fullest extent practicable.
- E. In performance under this policy, funds will not be used to duplicate facilities or services available in the area (with or without reimbursement) from Federal, State or local sources,

unless it is demonstrated that additional capacity is needed or that alternative services or facilities would be more effective or more likely to achieve the performance goals and mission of the Workforce Investment Council.

**EXCLUSIONS:** Purchase of the following items are excluded from this procurement policy:

- On-the-Job-Training (OJT)
- Individual Training Accounts (ITAs)
- Support Services

**CODE OF CONDUCT:**

All Workforce Investment Council procurements must comply with Board Policy WICCO-001 Code of Conduct.

**PROCUREMENT LEVELS:**

Small Procurements: Procurement of goods or annual services not exceeding \$5,000.

- ✓ Contracts may be awarded in any manner deemed practical or convenient, including by direct selection or award.
- ✓ Not intended to eliminate competitive quotations, but rather to expedite the purchasing process, as dollar values may not justify further solicitation efforts.

Intermediate Procurements: Procurement of goods or annual services exceeding \$5,000 but not exceeding \$50,000.

- ✓ Obtain at least three (3) informally solicited competitive price quotes. If three quotes are not reasonably available, fewer will suffice, but a written record of the effort made to obtain the quotes or proposals must be kept.
- ✓ Keep a written record of the sources of the quotes or proposals received.

Competitive Sealed Bids: Procurement of goods or services exceeding \$50,000.

- ✓ Publicly solicited Invitation For Bids for firm, fixed-price contracts when specifications can adequately be defined.
- ✓ Award made to responsive bidder with the lowest price.

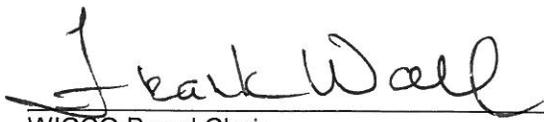
Competitive Sealed Proposals: Procurement of goods or services exceeding \$50,000.

- ✓ Publicly solicited RFP identifying all significant evaluation factors and their relative importance.
- ✓ Type of solicitation where negotiation is used and cost is not the overriding consideration.

Sole source Procurements: Procurement of goods or annual services from a single source

- ✓ Used when other procurement methods are impractical, infeasible or inadequate, AND one of the following circumstances applies:
  - Goods or service is available from only one source, or
  - Urgency for goods or service will not permit a delay, or
  - Awarding agency authorizes non-competitive procurement.

Approved:

  
\_\_\_\_\_  
WICCO Board Chair

  
\_\_\_\_\_  
Date

**POLICY #:** WIA-17  
**TITLE:** On-the-Job Training (OJT)  
**ISSUED:** December 18, 2003  
**REVISED:** January 21, 2010; January 19, 2012



#### **PURPOSE**

The on-the-job training (OJT) program provides full-time unsubsidized employment and training for WIA eligible individuals. The OJT program departs from traditional practice in that it may be characterized as a “hire first, train later” program. An alternative to more traditional classroom-based learning for eligible and registered participants, an OJT is a training partnership with employers allowing participants to learn in their real work environment with a structured training plan, under the supervision of their employer, with a commitment of continued employment following successful completion of the OJT.

In consideration of the extra costs to the employer of hiring and training a new employee or promoted employee onsite, a portion of the employee's wages may be reimbursed for a limited duration. OJTs are not a wage subsidy to employers or an incentive to hire. OJTs are intended to encourage the development of in-company training programs that lead to transferrable skills for WIA eligible individuals who would not otherwise be hired or promoted to a given position.

The purpose of an OJT contract is to assist businesses in training and retaining skilled, productive workers. OJT's may be used to help train newly hired employees or eligible current employees. This policy outlines how an OJT Agreement and subsequent Training Plans are to be developed by Region 15 subgrantees.

In addition, all subgrantees are provided with the Region 15 OJT Development Manual, which includes detailed information on OJT development with guidance relative to the product's rules and regulations along with samples of the referenced forms.

#### **REFERENCES**

- Workforce Investment Act, Sections 101, 134
- 20 CFR Parts 663.300 through 663.320; 663.440; 663.700 through 663.710; 667.262 through 667.275; 667.400 through 667.410

#### **POLICY**

##### **Aligning OJTs in Clackamas County and Portland/SW Washington Metro Service Areas**

Because the Portland Metro, Clackamas County and SW Washington service areas comprise one labor market, area employers may work with a number of OJT brokering agencies and several workforce regions. It is desirable from a customer service and marketing standpoint to keep OJT paperwork and rules as simple and standard as possible throughout the greater Portland/SW Washington labor market.

To that end, these standards define an OJT process that is in place for Clackamas, Multnomah, Washington, Clark, Cowlitz, and Wahkiakum Counties.



## **Regional Program Requirements**

### **1. OJT Structure**

OJT Agreements are signed by employers and WICCO subgrantees. OJT Agreements are non-financial. When a Trainee is identified and determined eligible, a Training Plan is completed and, at that point, funds are obligated.

The OJT payment to the employer is divided into two parts:

- 1) Training completion and expected continued employment at thirty (30) or more hours per week;  
and
- 2) Continued employment through the ninety (90) day retention period and expected continued employment at thirty (30) or more hours per week.

The total OJT reimbursement amount may never exceed 50% of the Trainee's gross earnings during the training period, or \$5,000 **whichever is less**. Up to half the OJT reimbursement, not to exceed \$2,500, is paid at the end of the training if all conditions for a Training Payment are met (see #9 below).

The remainder of the OJT reimbursement is paid at retention, if all conditions for a retention payment are met (see #9 below). The total OJT reimbursement obligation – the sum of the training payment and retention payment amounts – should be calculated and shown on the top of the Training Plan and is the amount obligated for the training activity.

### **2. OJT Trainees**

OJTs may be written for newly hired employees (within 2 weeks of the hire date or 4 weeks for OJTs originating with staffing services) or for current employees who require additional training to advance in their salary structure to a new position or to a position eligible for benefits.

### **3. OJT Forms and Paperwork**

The following standard OJT forms will be used. The forms are provided as Word Document Forms and are designed to be created on a computer and printed for signature.

- ♦ On-the-Job Training Employer Checklist
- ♦ On-the-Job Training Agreement and Rules
- ♦ On-the-Job Training Plan and Instructions
- ♦ On-the-Job Supplemental Training Plan
- ♦ On-the-Job Training Plan Modification
- ♦ On-the-Job Training Invoice – Training Period
- ♦ On-the-Job Training Invoice – Retention Period
- ♦ On-the-Job Training Exception Request

### **4. On-the-Job Training Employer Checklist**

Complete the Employer Checklist when an employer is interested in entering into an OJT Agreement. OJT agreements cover both new hires and eligible, current employees. The checklist should be updated when the business is sold; transferred; or when any other major changes affecting training, hiring or job retention occur; and at least every other year. Every employer must have a completed, current and signed checklist on file. A copy of the OJT Employer Checklist must be submitted to WICCO Director of Programs.



The first twelve items on the Employer Checklist are informational and designed to trigger discussion around the employer's business and workforce needs. The second eight items are regulatory and may prevent writing the OJT if an irresolvable problem surfaces (refer to the OJT Development Manual for additional details). When the employer representative signs the form, they are attesting to the validity of the regulatory information. The Employer Checklist becomes a part of the OJT Agreement by reference.

This initial discussion should consider each employer's circumstances. For example, relocation need not be discussed with a locally owned grocery store which has been at the same location for ten years. Relocation should be discussed with a national firm with many subsidiaries which is just breaking ground in the area. (See Checklist item #20)

#### 5. **On-the-Job Training Agreement and Rules**

An OJT Agreement is completed after the Employer Checklist has been finalized, and any issues that may have surfaced have been resolved.

*Note:* If the employer has entered into OJT's in the last two (2) years, the retention rate must either be adequate or an acceptable corrective action plan must be in place. A 75% retention rate is presumed to be adequate. If a lower retention rate has occurred (See Checklist item #20), a reasonable explanation or a corrective improvement must be documented. If fewer than five OJT's have completed in the last two years, the small sample size should also be considered. This calculation is to take into consideration all OJT's written within the Region – if an employer indicates they have used OJT's in the past, check with the WICCO Program Director to determine Regional experience (if any). Any OJT's written for businesses that are located in other regions must be coordinated with that Region and cleared with the WICCO Program Director. Refer to the OJT Development Manual for further detail and information.

The Agreement will cover any positions that have been identified for which the employer expects to need help filling and which are likely to require On-the-Job training; as well as positions which are now filled by eligible adults, dislocated workers or youth who need training to retain employment and advance.

The Agreement and OJT Rules should be reviewed and discussed with the employer (and any involved staffing agency) to assure they understand the intent of the Agreement as well as the restrictions that apply. Both the employer of record and the subgrantee sign the OJT Agreement (see Employer Checklist item #4).

#### 6. **On-the-Job Training Plan and Instructions**

The On-the-Job Training Plan is the document which obligates training funds for a trainee and outlines the planned training activities to be accomplished during the training period. Instructions for making the skill assessments are included on the form.

All trainees must be determined WIA eligible, been newly hired by the employer (within two weeks of the hire date) and determined to require training in order to meet the employer's entry-level standards for the position. Or, the trainee may be a current employee who has been determined WIA eligible and needs training to advance to a new position.



“Skills to be Learned” should be documented in the Training Plan. Put the skills in plain English, basing the score primarily upon the supervisor’s judgment. Training is presumed to be needed when the Skills to be Learned “Starting Capability” scores are either a “1” (beginning) or a “2” (intermediate) and can be raised to “3”s (skilled) by the end of the training period. Exceptions may be granted on a case-by-case basis.

For new hires, the job should be expected to last at least a year and provide at least thirty (30) hours of work each week. The wage in the training plan should be at least \$10.00 per hour plus a benefit package that includes at least medical insurance with an employer contribution toward premiums. Exceptions may be made on a case by case basis.

A current employee must also, as a result of successfully completing the OJT:

- ♦ Expect a wage gain of \$0.50 or more by the end of the training period; or
- ♦ Expect an upgrade to a new position; with the vacancy created for the employee’s previous position “backfilled” with a new hire made through the subgrantee after training is complete.

Case-by-case exceptions may be granted. Examples of exceptions might include (but are not limited to) a worker who:

- ♦ Has a disability and requires retraining; or
- ♦ Will gain medical benefits and regular employment status as a result of the training; or
- ♦ Would avoid a layoff through retraining.

Training need, training completion, and training length are determined trainee-by-trainee using the OJT Training Plan Instructions.

The duration of the training period should be estimated as follows:

- ♦ The subgrantee representative, working with the employer, determines the job title for the position to be trained for by referencing the Occupational Network (O-Net).
- ♦ From O-Net, SVP parameters are obtained. It is within these parameters that the length of training is set (see OJT Development Manual Section VI.D).
- ♦ The subgrantee representative should consider the training needs of each participant.
- ♦ An OJT must be limited to the period of time required for a participant to become proficient in the occupation for which training is being provided. In determining the appropriate length of the contract, consideration must be given to the skill requirements of the occupation in conjunction with the academic and occupational skill level of the participant, their prior work experience, and any disability they may have.
- ♦ No OJTs should be written with a training period of less than four weeks or more than 25 weeks (see OJT Commitment Obligation Calculator). Exceptions may be made on a case-by-case basis.
- ♦ A current employee may receive an OJT if they are determined eligible and additional skills and abilities are needed. The OJT “Starting Capability” score and planned gain by the end of the training period document the need for additional skills and abilities and justify the writing of an upgrade OJT.

#### **7. On-the-Job Supplemental Training Plan**

Supplemental training tied to training on-the-job may be negotiated using the OJT Supplemental Training Plan. An example is a computer class that is scheduled during the trainee’s normal work hours that would help the trainee better complete their job duties. The employer might agree to



release the trainee for that time period if that trainee agrees to take, attend and make satisfactory progress in the class. Supplemental training is highly encouraged when appropriate and may be paid for, in whole or in part, by the employer, the subgrantee or by the trainee. WIA training funds may be used for supplemental training required as a part of the Training Plan.

#### 8. **On-the-Job Training Plan Modification**

Modifications to the OJT may be executed as needed. The most common modification is extension of the training period. The second most common modification is a changed training plan. Work conditions often shift or trainee skills may require new work duties or a position change.

#### 9. **OJT Invoices**

There are two pay points for On-the-Job Training Plan obligations – at the completion of training and at the end of the retention period. The total OJT payment may not be more than 50% of the wages earned during the training period, or \$5,000, **whichever is less**. One-half of the payment is made at the completion of training and the remainder paid 90 days later at the successful retention of the trainee.

**OJT Invoice – Training Period:** Once all of the “Skills to be Learned” listed in the Training Plan have been scored a “3” (“skilled”), an invoice may be submitted for the training period. The standard for scoring a “3” is “Meets the employer’s standard for the task.” Scoring should consider the employer’s normal expectation for an employee in the same position at the same pay grade and with similar job tenure. Exceptions may be made on a case-by-case basis.

The trainee must still be employed and expected to work at least thirty (30) or more hours each week in the normal course of business after the training period and retention period. No material compliance issues may be outstanding.

Complete all components of the training period invoice and use the calculation on the invoice to compute the appropriate billing amount.

**OJT Invoice – Retention Period:** The remainder of the OJT reimbursement (no more than 50% of gross wages in the Training Period, minus the Training Payment) may be requested after an additional ninety (90) days has elapsed after training completion and the trainee has retained employment which is expected to provide thirty (30) hours of paid work a week or more.

Exceptions may be granted on occasion. An example of a case when an exception should be made is when a trainee voluntarily switches jobs to increase their pay rate or gain other significant benefits. If the trainee quits or is fired for cause, disqualifying them from receiving unemployment compensation, an exception may also be granted, particularly if the employer has a good retention track record and continues to hire through the WorkSource system.

Total OJT reimbursements for an individual trainee should not exceed the amount obligated as shown on the top of the Training Plan, or any subsequent modifications.

#### 10. **Trainees Leave Prior to Completion of Retention**

If the Trainee leaves during the training period, the employer will be reimbursed only for 50% of the wages earned during training, prior to separation.



If the Trainee leaves on their own or is terminated for cause during the retention period, the employer should be reimbursed for all training costs (both the training payment and the retention payment). A meeting with the employer should try and determine if the trainee actually went to another employer at an equal or better salary as a result of the training received. Are there circumstances that need to be addressed in future referrals? Can a replacement re-fill the position, with or without another OJT?

If the Trainee is laid off during the retention period, the employer does not qualify to receive the retention payment.

**11. Writing a Second OJT for the Same Individual**

When training and retention is completed, there may be opportunity to see if an “upgrade” is possible (increasing pay \$.50 an hour or more) and if a “backfill” and a new hire can be negotiated. If “upgrade” is possible, consider writing a second OJT for the same trainee. Significant additional training, as documented in a new Training Plan, must be needed.

**12. On-the-Job Training Exceptions**

From time-to-time a participant or work conditions may not fit the “OJT” model outlined in this procedure. Exceptions should not become the norm but may be made when appropriate. Recognized exceptions include:

- A. The trainee is not expected to be fully skilled (all “3”s on the Ending Capability score) at the end of the training period, but substantial training has occurred and the trainee is expected to be retained and trained further by the employer. The trainee should have gained a significant number of score points overall: “1”s to “2”s and some “2”s to “3”s, for example. An extension of the training period past the 25 weeks may be warranted or the employer may deem the participant “trained” to a satisfactory level to maintain employment in the position.
- B. A current employee trainee will not achieve a wage gain of 50 cents per hour or more, and no upgrade and “backfill” is expected. If there are other considerations, such as benefits or lay-off aversion, an exception may be warranted.
- C. The job pays less than \$10.00 per hour but a special participant or employer circumstance exists. For example, medical benefits are provided to a single mother on public assistance or an employee with a recent prison stay, but the job only pays \$8.50 per hour. The employer might expect to accelerate pay increases through advancement so that trainees hired at \$8.50 can reasonably expect to earn \$10.00 by retention.
- D. Training is critically needed and results can be measured, but may be for a very short or a very long period of time.
- E. The employer did a good job of training but may not qualify for all or part of the OJT reimbursement because the trainee quit or was fired for cause.
- F. A trainee’s individual circumstances should also be considered. For example, the OJT length or amount may be adjusted to reasonably accommodate a learning or other disability.

- G. The trainee is placed in a job that is less than 30 hrs per week because physical or mental challenges limit their ability to work a 30 or more hour work week.

All exceptions should be documented using the On-the-Job Training Exception Request form, and submitted to the WICCO Director of Programs to bring before WICCO's Business Services Committee for review and approval.



Approved:

Frank Wall

WICCO Board Chair

1/19/12  
Date



**POLICY #: WIA-18**

**TITLE: Customized Training**

**Issue Date: December 18, 2003**

**Revision Date: October 10, 2008**

**PURPOSE:**

The Workforce Investment Act (WIA) of 1998 provides that contracted customized training activities may be provided to eligible Adults and Dislocated Workers, and currently employed individuals. To provide customized training the Workforce Investment Council of Clackamas County (WICCO) and subrecipients are required to meet the following established guidelines contained in this policy.

**REFERENCES:**

WIA Sections 101 and 134

20 CFR Parts 663.300 - 663.320; 663.440; 663.700 - 663.720; 667.262 - 667.275; 667.400 - 667.410

WICCO #WIA-13 Self-Sufficiency

**DEFINITIONS:**

Collective Bargaining Agreement: An agreement or contract negotiated between employer and union representatives to assure a sound and mutually beneficial working relationship between the employer and its employees. Such an agreement sets forth the basic terms and conditions of employment.

Customized Training: Training that is designed to meet the special requirements of an employer (including a group of employers); is conducted with a commitment by the employer to employ, or in the case of current workers, continue to employ, an individual on successful completion of the training; and, for which the employer pays for not less than 50 percent of the cost of the training.

Eligible Individual: Individuals who have been determined eligible for adult and/or dislocated worker training services. Training for an individual who is currently employed may be provided when the employee is not earning a self-sufficient wage and training relates to the introduction of new technologies, introduction of new production or service procedures, upgrade to new jobs that require additional skills, workplace literacy, or other appropriate training approved by the WICCO.

Retention: The act of keeping a job beyond the training cost reimbursement period covered by WIA funds.

Unsubsidized Employment: Employment not financed from funds provided under WIA.



## **POLICY:**

WICCO subrecipients who provide WIA-funded customized training activities must require the employer(s) to: a) pay for not less than 50 percent of the cost of the training, b) commit to employ, or in the case of those who are currently employed, continue to employ participants after successful completion of the program, and c) comply with all WIA rules and regulations, related fiscal management requirements, and relevant employment laws and safety rules.

All contractor procedures will incorporate the following guidelines for establishing and delivering training to eligible participants through customized training.

### **Eligible Employer (Group of Employers) / Training Providers**

1. Any employer or group of employers being fully established and operating successfully prior to the date of contract proposal, located in Clackamas County or within the recognized labor market for Clackamas County residents, and meeting the requirements of WIA, is eligible for participation.
2. Training services must be provided in a manner that maximizes informed consumer choice in selecting an eligible provider.
3. If an employer or training provider is a member of the WICCO, then that member shall submit to the WICCO a written conflict of interest statement which would disclose any activity related to WIA and customized training.

### **Training Costs**

Instructors can be either full or part-time educators, or professionals from the business community. Costs may include the course tuition, costs of wages during the time of the training for eligible trainees, facilities costs, and material and supply costs. Purchases of capital equipment or production equipment are not allowed. The employer's contribution must be at least a dollar-to-dollar match of the WIA amount and may be met through cash or in-kind contributions. In-kind contributions may include the value of in-house facilities and eligible trainee wages. Employer contributions must be documented and traceable to original payroll documentation and/or invoices for purchases.

WIA funds may not be used for training that can be paid from other readily available private, government, or grant sources.

### **Customized Training Protections**

1. Customized training participants shall not displace (including a partial displacement, such a reduction in the hours of non-overtime work, wages, or employment benefits) any currently employed employee (as of the date of the participation).

This policy will remain in effect from the date of issue until such time that a revision is required.



2. Customized training activities shall not impair an existing contract for services or collective bargaining agreement and no such activity that would be consistent with the terms of a collective bargaining agreement shall be undertaken without the *written concurrence of the labor organization and employer concerned.*
3. A participant shall not be hired or promoted to a job if:
  - any other individual is on layoff from the same or any substantially equivalent job.
  - the employer has terminated employment of any regular employee or otherwise reduced the workforce of the employer with the intention of filling the vacancy so created with the participant.
  - the job is created in a promotional line that will infringe in any way upon the promotional opportunities of currently employed individuals (as of the date of the participation).
4. No funds will be used for customized training for any business that has relocated, until the date that is 120 days after the date on which such business commences relocation, if the relocation of such business or part of a business results in the loss of employment for any employee at the original location and such original location is within the United States.

### **Administration**

1. A written contract signed by the contractor, employer, and training provider is required for each WIA-funded customized training activity and must be completed prior to the commencement of any customized training activity.
2. Contractors are responsible for:
  - a) Completing pre-award assessments to determine if an employer or group of employers and their selected training provider is eligible to for a customized training contract.
  - b) Obtaining necessary information and writing the customized training contract.
  - c) Offering technical assistance to employers.
    - a. Invoice voucher preparation
    - b. Compliance with contract and WIA regulation
    - c. Documenting training costs, including employer-paid costs
    - d. Clarify any questions or concerns of employer
    - e. Be responsible for any changes/modifications to all customized training contracts with employers
  - d) Encouraging employers to use the apprenticeship program on all feasible job classifications.
  - e) Ensuring that all current or new hire positions meet the following criteria:
    - a. Be developed only for occupations in which there is demand
    - b. That full-time employment be available after training is provided



3. All contractors using customized training contracts must establish a monitoring schedule (i.e., frequency and intervals) for current contracts as well as follow-up after contract completion. At least one follow-up visit with the employer should be done after a customized training contract is completed to determine that the agreed-upon wage(s) (and /or wage increase(s)) is/are being paid, that benefits comparable to those received by other workers are being provided to the workers, and to get employer/employee feedback on the customized training experience.

**Records Maintenance**

The contractor, employer, and training provider shall maintain documentation to support the appropriateness and necessity of the activity for individual participants and to support all related expenditures.

Contractor, employer, and training provider records are subject to review upon request of WICCO, the Oregon Department of Community Colleges and Workforce Development, and U.S. Department of Labor. The Contractor, employer, and training provider shall retain all records in accordance with WICCO's Records Retention policy.

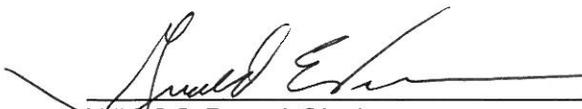
**Invoicing**

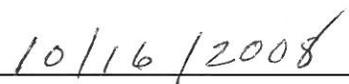
Payments to the employers or training provider by the contractor must be documented by an acceptable invoicing method.

**General Provisions/Grant Assurances and Certifications**

All contractors, employers, and training providers must adhere to the General Provisions/Grant Assurances and Certifications as written and established by WICCO.

Approved:

  
\_\_\_\_\_  
WICCO Board Chair

  
\_\_\_\_\_  
Date

<b>Subject:</b> WIA Policies – Work Experience	<b>Number:</b> WIA-19
	Page 1 of 5

**Effective Date:**  
1st reading 3-18-04  
Approved 5-12-04

## **PURPOSE**

To establish and communicate the principles and guidelines regional contractors will follow to develop and deliver Work Experience opportunities to WIA-eligible customers.

## **REFERENCES**

- Workforce Investment Act, Sections 101, 129, 134
- 20 CFR Parts 663.200; 664.460 and 470.
- Workforce Investment Council of Clackamas County Policy # WIA-04

## **BACKGROUND**

The Workforce Investment Act of 1998 specifies that Work Experience (WE) opportunities may be provided as an intensive service to Adults and Dislocated Workers, and must be made available to Youth for whom the service is deemed appropriate. As one of the methods for delivering short-term pre-vocational services to Adults and Dislocated Workers and an important developmental experience for Youth, the goal of WE is to provide individuals who may have limited experience in the workforce, have “irregular” work histories or otherwise have insufficient on-the-job experience to obtain employment in occupations that will lead to self-sufficiency. A work-based learning alternative, WE relies on a partnership among the customer, contractor, work sites, and employer, as applicable, according to a structured plan. Eligible and registered customers work on employability skills and/or job-specific skills as employees or volunteers on public or private, for-profit or not-for-profit work sites.

## **DEFINITIONS**

1. Employer: Where the participant is engaged in a paid work experience, the employer of record, whether or not the employer is receiving a wage subsidy. May or may not also be the participant’s work site.
2. Work Site: The private for-profit, not-for-profit, or public organization providing the supervision and on-site location for the work experience. May or may not also be the participant’s employer.
3. Work Experience (WE) is a planned, structured learning experience that:
  - (a) Is linked to achievement of necessary workplace readiness, job-specific skills, and/or experience;
  - (b) Is limited in duration as appropriate to the needs of the participant;
  - (c) Takes place in a private for-profit, not-for-profit, or public workplace;
  - (d) Can be paid or unpaid;
  - (e) Can be subsidized or unsubsidized; and,
  - (f) May include:
    1. Instruction in employability skills or in generic workplace skills;
    2. Exposure to various aspects of an industry;

<b>Subject:</b> WIA Policies – Work Experience	<b>Number:</b> WIA-19
	Page 2 of 5

3. Progressively more complex tasks;
4. Internships and job shadowing;
5. The integration of basic academic skills into work activities;
6. Entrepreneurship;
7. Service Learning;
8. Community Service; or
9. Other elements identified in the participant's service strategy.

## **POLICY**

Region 15 contractors who provide WIA-funded WE activities to Adults, Dislocated Workers or Youth will develop and implement procedures for conducting WE activities to assure the following:

1. The WE will result in a return on the investment of WIA funds (i.e. retention of the participant in permanent unsubsidized employment that leads to self-sufficiency, upon successful completion of his/her planned activities.)
2. Activities will comply with all WIA rules and regulations, related fiscal management requirements, and relevant employment laws and safety rules.

All contractor procedures will be presented to WICCO administration for approval and will be reviewed at least annually as part of WICCO's Quality Assurance Review. All contractor procedures will incorporate the following guidelines for establishing and delivering WE.

## **Work Site Eligibility**

Any public agency, private non-profit, or private for-profit organization, may be used as a WE work site if it satisfies the following conditions:

- a) Has the facility to provide the type of experience and/or skill development identified in the participant's service plan and WE agreement;
- b) Can provide the appropriate type and amount of work to simulate an unsubsidized work environment;
- c) Has the personnel to provide adequate supervision, instruction, and feedback for the participant;
- d) Does not engage the participant in political or sectarian activities or in the operation or maintenance of a part of any site that is used for religious instruction or worship;
- e) Maintains appropriate standards of health, safety, accessibility and a drug free workplace and provides safety instruction to reasonably protect the participant against injury;
- f) Does not use WE assignments to displace regular employees, or to replace any employee on layoff;
- g) Has gained union concurrence with the WE, if the site has a union/collective bargaining agreement;
- h) Has not relocated from any location in the United States within 120 days, if the relocation resulted in any employee losing his or her job at the original location;
- i) Does not subcontract the services of the participant;
- j) Maintains appropriate types and levels of insurance coverage and/or bonding; and,

<b>Subject:</b> WIA Policies – Work Experience	<b>Number:</b> WIA-19
	Page 3 of 5

- k) Complies with all federal, state, and local laws regarding employment, requiring equal employment opportunity, and prohibiting discrimination or harassment in the workplace.

### **Participant Eligibility**

Persons to participate in WE activities must meet the eligibility requirements for receiving services under the Adult, Dislocated Worker or Youth programs.

For Adults and Dislocated Workers, this means customers who:

1. Have been determined to be eligible for Title IB services beyond universal services;
2. Have received one or more core service and are unable to obtain employment through core services;
3. Have been determined to need more intensive services in order to obtain or retain employment; and,
4. Has a service plan specifying participation in a WE

For Youth, this means customers who:

1. Have been determined to be eligible for WIA youth services;
2. Are enrolled in WIA youth services;
3. Have been assessed as being appropriate for WE; and,
4. Have a service plan specifying participation in a WE.

### **Paid or Unpaid Work Experience**

Work Experience may be a paid or unpaid activity. A determination as to whether an employment relationship exists and wages must be paid for the activity will be governed by the requirements of the Fair Labor Standards Act (FLSA). If the work activity meets all of the following criteria, payment of wages is not mandated and will be a contractor option:

1. The WE, even though it includes actual operation of the facilities of the work site, is similar to that which would be given in a vocational school. This would include the following:
  - a. A WE agreement that stipulates the respective responsibilities of the work site, the participant, and the work site instructor/supervisor;
  - b. A WE plan that identifies the competencies to be learned, the length of the activity and the assessment method to be used to track participant progress; and,
  - c. Provision of the WE under the continued and direct supervision of either a certified instructor, a certified work-based learning coordinator, or employees of the work site.
2. The WE is for the benefit of the participant.
3. The participant does not displace regular employees, but works under their close observation.
4. The work site that provides the WE derives no immediate advantage from the activities of the participant, and on occasion work site operations may actually be impeded.
5. The participant is not necessarily entitled to a job at the conclusion of the WE.
6. The work site and the participant understand that the participant is not entitled to wages for the time spent in the WE.

If the activity does not meet all of the above criteria, an employment relationship exists and participants must be compensated for their WE at a rate not less than the minimum wage. Where

<b>Subject:</b> WIA Policies – Work Experience	<b>Number:</b> WIA-19
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an employment relationship exists, or the contractor opts to develop an employment relationship, the participant is to be provided with FICA and Worker's Compensation coverage while engaged in the WE. Wage payments to the participant are made only for time actually spent in the WE and do not include holiday, vacation, or sick leave pay.

### **Subsidized or Unsubsidized Work Experience**

It is generally expected that contractors will serve as the employer of record for their respective participants in paid WE activities. As the employers of record, the contractors are responsible for conducting all employment-related activities, such as time-tracking, payroll, employer tax reporting, etc., and complying with all applicable federal, state, and local employment laws.

Where contractors deem it would be appropriate, balancing benefits with risks and liabilities, contractors may choose to develop agreements directly with a work site wherein the work site organization would also serve as the employer of record. In these circumstances, the employer work site may be reimbursed for up to 100% of the participant's wages, per the terms of a written WE agreement.

### **Length of Work Experience**

A WE shall be for a reasonable length of time, based on the participant's needs as documented in his/her service plan. In determining the appropriate length of the WE, consideration should be given to the participant's prior work experience, employability, workplace readiness, skills or experience needed, and learning goals. The length and hours of a WE must be determined as part of the development of a WE agreement and specified in the agreement and participant plan. Unless extraordinary circumstances warrant, a WE shall generally not exceed 520 hours.

### **Administration**

1. A written agreement signed by the contractor, work site, and employer, as appropriate, is required for each WIA-funded WE activity and must be completed prior to the commencement of any WE.
2. Contractors are responsible for :
  - a) Developing objective criteria to choose participants and work sites.
  - b) Completing pre-award assessments to determine if a work site is eligible for a WE.
  - c) Obtaining necessary information and writing the WE agreement.
  - d) Offering technical assistance to work sites and employers, as appropriate, on:
    - a. Compliance with agreement and WIA regulations;
    - b. Time and attendance tracking;
    - c. Payroll and financial record requirements for employers;
    - d. Any questions or concerns of the work site; and,
    - e. Changes/modifications to any WE agreements.
  - e) Ensuring that all WE activities are conducted in compliance with local, state, and federal rules and regulations, including the Workforce Investment Act, Fair Labor Standards Act, Equal Opportunity, and Americans with Disabilities Act.
  - f) Establishing and implementing a monitoring schedule for all WE activities.

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**Records Maintenance**

The contractor, work site, and employer, as appropriate, shall maintain documentation to support the appropriateness and necessity of the activity for individual participants and to support all related expenditures.

Records shall be retained in accordance with WICCO’s Records Retention policy and are subject to review upon request of WICCO, the Oregon Department of Community Colleges and Workforce Development, and U.S. Department of Labor.

**General Provisions/Grant Assurances and Certifications**

All contractors, work sites, and employers, as appropriate, must adhere to the General Provisions/Grant Assurances and Certifications as written and established by WICCO.

**ACTION:**

WICCO and Region 15 contractors and sub-contractors shall follow this policy. This policy will remain in effect from the date of issue until such time that a revision is required.

**INQUIRIES:**

Inquiries should be addressed to the WICCO Executive Director at 503.657.6958, ext ~~5267~~  
5271

Approved:

  
\_\_\_\_\_  
WICCO President

  
\_\_\_\_\_  
WICCO Executive Director

**POLICY #: WICCO-001**

**TITLE: Code of Conduct, Conflict of Interest Policy**

**Issue Date:** November 14, 2002

**Revision Date:** June, 2007

**PURPOSE:**

To ensure the Workforce Investment Council of Clackamas County's staff and Board Members avoid conflicts of interest and adhere to a professional code of conduct in accordance with guidelines established in the referenced regulations listed below.

**REFERENCES:**

- WIA Sec 117
- Title 20 CFR 667.200
- Title 29 CFR 95.42
- Title 29 CFR 97.36 (b)

**POLICY:**

A Board member must neither cast a vote, nor participate in any discussion or decision making capacity, on the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to that member or a member of his/her immediate family.

No employee, Board member, officer or agent shall participate in the selection, award, or administration of a contract supported by Federal funds if a real or apparent conflict of interest would be involved.

No employee, Board member, officer or agent of the grantee or subgrantee shall participate in selection, or in the award or administration of a contract supported by Federal funds if a conflict of interest, real or apparent, would be involved.

Such conflicts would arise when the employee, Board member, officer or agent, any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in the firm selected for an award.

***WICCO Board Member Acknowledgement:***

I acknowledge that I have read and understand the WICCO Board Policy WICCO-001, Code of Conduct and Conflict of Interest Policy.

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

Approved:

  
\_\_\_\_\_  
WICCO Board Chair

  
Date



**WICCO Board Resolution #: RS-002 Establishing Signatory Authority and Limitations**

**Effective Date:** February 17, 2010

**PURPOSE:**

To establish signatories, limitation of expenditures and federal cash draw authorizations for the WICCO bank account.

**REFERENCES:**

**POLICY:**

The following individuals have authority to sign checks and conduct bank business on behalf of the WICCO:

WICCO Executive Director	Kim Parker
WICCO Board Chair	Frank Wall
WICCO Board Treasurer	Jerry Smith

The Board authorizes its Staff to approve and execute payment for WICCO expenditures previously approved through a contract for services or approved by the adopted budget.

Any expenditure not approved through a contract or budget that is over \$5,000.00 requires the consent of two Executive Committee members, either written or by email. This approval will state the amount, expenditure, and reason for expenditure.

The Board authorizes that non-contractual expenditures over \$5,000 being paid through any WICCO bank account require signature from a WICCO Board officer.

Approved:

Frank Wall                      2/17/10  
WICCO Board Chair                      Date



**WICCO Board Resolution #: RS-003**

**Power to Execute Contracts**

**Effective Date: February 17, 2010**

**PURPOSE:**

To establish authority to sign contracts on behalf of the WICCO.

**REFERENCES:**

**POLICY:**

The following individuals have authority to execute contracts on behalf of the WICCO:

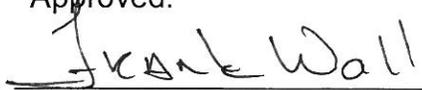
WICCO Executive Director	Kim Parker
WICCO Board Chair	Frank Wall
WICCO Board Treasurer	Jerry Smith

Contracts approved via the Request for Proposal (RFP) process (including WIA Service Provider awards) may be signed by any of the above listed signers.

Contracts not subject to WICCO RFP procurement procedures, with an annual value between \$5,000 and \$25,000, may only be executed by a board officer.

Contracts within the scope of the Board Strategic goals and with an annual value up to \$4,999 may be executed by the Executive Director, provided notification is given at next scheduled board meeting.

Approved:


2/17/10  
 \_\_\_\_\_  
 WICCO Board Chair Date



**POLICY #: WICCO-034**  
**Decision Making Authority of the Full Board of Directors and the Executive Committee**

**Issue Date: April 15, 2010**

**PURPOSE:**

The following outlines the role, responsibility, and authority of the executive committee and full board.

**Executive Committee:**

- Contractual decisions
- Service delivery model decisions
- Budget/audit decisions
- Programmatical decisions

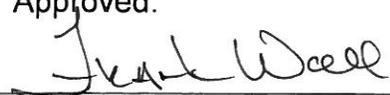
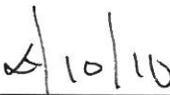
**Board of Directors:**

- Advocacy for the system balance between supply (jobseeker) and demand (employer)
- System quality and outcome evaluation
- Policy decisions
- Strategic direction/decisions

In order to assure transparency and complete communication, every Executive Committee meeting will be publicized to the full board of directors and every decision the Executive Committee makes will be placed on the next meeting of the full board's consent agenda.

In an instance where a decision is needed in a timely fashion, the board of directors authorizes and delegates full decision making authority to the executive committee.

Approved:

   
\_\_\_\_\_  
WICCO Board Chair                      Date



**POLICY #: WICCO-031    TITLE: Nondiscrimination and Equal Opportunity Requirements and Attachments for Posting**

**Issue Date:            November 14, 2002**  
**Revision Date:        October 10, 2008**

**PURPOSE:**

To implement the requirements of the nondiscrimination and equal opportunity (EO) provisions of the Workforce Investment Act of 1998 (WIA), which are contained in section 188 of WIA. Section 188 prohibits discrimination on the grounds of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and for beneficiaries only, citizenship or participation in a WIA Title I financially assisted program or activity.

The Workforce Investment Council of Clackamas County (WICCO) will utilize this policy to:

- a) Notify regional subgrant recipients of federal funds that the required "EO is the law" language needs to be included on communications (brochures, publications, broadcasts, and websites) for applicants and on recruitment materials for individuals applying to a recipient to work in the One Stop system.
- b) Notify regional subgrant recipients they need to place designated posters with specific EO language regarding processing complaints in all One Stop locations referenced in the local and regional workforce plans, and in affiliated sites.
- c) Notify regional subgrant recipients of federal funds in Oregon of the state's Methods of Administration, which describes how the state will administer the WIA equal opportunity provisions.
- d) Provide regional subgrant recipients of federal funds with program operating standards and guidance on matters related to nondiscrimination and equal opportunity requirements.

**REFERENCES:**

Public Law 105-220, Section 188  
20 CFR Part 667.275, WIA Nondiscrimination and EO Provisions  
20 CFR Part 31, 32, and 37, WIA Nondiscrimination and EO Provisions  
28 CFR Part 36, ADA Standards for Accessible Design  
Americans with Disabilities Act of 1990, Title II, Subpart A  
Titles VI and VII of the Civil Rights Act of 1964, as amended  
Age Discrimination Act of 1975, as amended  
Title IX of the Education Amendments of 1972  
Section 504 of the Rehabilitation Act of 1973  
USDOL TEIN No. 16-99

This policy will remain in effect from the date of issue until such time that a revision is required.



Oregon Administrative Rule (OAR) 151-010-0015 (EO Nondiscrimination)  
State of Oregon Methods of Administration

**DEFINITIONS:**

Complaint: For purposes of this policy, means an allegation of a violation of the nondiscrimination and equal opportunity provisions.

Recipient: Taken from title 29 CFR Part 37, means any entity to which financial assistance under WIA Title I is extended, either directly from the Department of Labor (DOL) or through the Governor or another recipient (including any successor, assignee, or transferee of a recipient), but excluding the ultimate beneficiaries of the WIA Title I-funded program or activity. In addition, One-Stop partners, as defined in Section 121(b) of WIA, are treated as "recipients" and are subject to the nondiscrimination and equal opportunity requirements of Title 29 CFR Part 37, to the extent that they participate in the One-Stop system.

**POLICY:**

The WICCO is dedicated to a policy of nondiscrimination and committed to a spirit of affirmative action in the administration of programs and the provision of services. In the operation of any program, no person shall be discriminated against or denied benefits as a participant, administrator or staff person by WICCO or its recipients on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief. In addition, no WIA Title IB participants or beneficiaries shall; on the basis of citizenship or status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIA Title I financially assisted program or activity; be excluded from participation in, denied benefits of, subjected to discrimination under, or denied employment in the administration of, or in connection with, any WIA Title I funded program or activity.

Appropriate efforts shall be made by WICCO for outreach to training, placement, and advancement of disabled individuals in employment and training programs. Auxiliary aids and services will be made available upon request to persons with disabilities.

**WICCO Administrative office Responsibilities:**

1. Copy guidelines and reference materials related to nondiscrimination and equal opportunity laws and regulations to regional subgrant recipients.
2. Forward to Region 15 subgrant recipients information regarding minority owned businesses and organizations serving disabled and minority individuals in their region.
3. Notify the state of Oregon Equal Opportunity Officer and the US department of Labor Civil Rights Center (CRC) of any lawsuits or administrative enforcement actions alleging WIA-related discrimination on the grounds of race, color, religion,

This policy will remain in effect from the date of issue until such time that a revision is required.



sex, national origin, age, disability, political, and for beneficiaries only, citizenship or participation in the WIA Title I.

**Region 15 Contractor and Subcontractor Responsibilities:**

1. Assure that each applicant receives a copy of the Nondiscrimination/Equal Opportunity is the law notice in appropriate written format, or appropriate format for individuals with visual impairments. Record the receipt of nondiscrimination and equal opportunity information in the applicant file.
2. Comply with WICCO policy in the notification of the WICCO administrative office of documented complaints, lawsuits or administrative enforcement action alleging discrimination on the grounds of race, color, religion, sex, national origin, age, disability, political affiliation, and for beneficiaries only, citizenship or participation in WIA.

**WICCO and Subcontractors Responsibilities:**

1. Appoint an EEO Coordinator that will be responsible managing WIA contracts and grants.
2. Include an assurance of nondiscrimination/equal opportunity with respect to the operation of WIA-funded programs or activities on each application for federal financial assistance and WIA, and procurement contracts.
3. Encourage the provision of equitable services among substantial segments of the WIA Title I eligible population.
4. Ensure that no individual shall be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with any program.
5. Make program services and information available in languages other than English as appropriate and required under 29 CFR 37.35.
6. Maintain an up-to-date Accessibility Self-Evaluation report.
7. Provide initial and updated EEO and nondiscrimination policy updates to subgrantees regarding WIA applicants/registrants, applicants for employment, and members of the public.
8. Provide signage at a primary entrance to each of its facilities. The international symbol for accessibility shall be used at each primary entrance of an accessible facility.
9. Include appropriate taglines on publications, broadcasts, and other communications about programs and activities funded with WIA.
10. Prominently display current EEO notices in both English and Spanish at WorkSource Clackamas centers and affiliated sites. The posters will include the name, address, and contact information for the EEO Coordinator.
11. Provide an orientation to new participants and/or new employees that include a discussion of nondiscrimination and EEO rights and processes.
12. Disseminate internal memoranda and other written or electronic information regarding nondiscriminatory practices.

This policy will remain in effect from the date of issue until such time that a revision is required.



## ATTACHMENT I

**Equal Opportunity Is the Law**

It is against the law for this recipient of Federal financial assistance to discriminate on the following bases: against any individual in the United States, on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief; and against any beneficiary of programs financially assisted under Title I of the Workforce Investment Act of 1998 (WIA), on the basis of the beneficiary's citizenship/status as a lawfully admitted immigrant authorized to work in the United States, or his or her participation in any WIA Title I-financially assisted program or activity.

The recipient must not discriminate in any of the following areas: deciding who will be admitted, or have access, to any WIA Title I- financially assisted program or activity; providing opportunities in, or treating any person with regard to, such a program or activity; or making employment decisions in the administration of, or in connection with, such a program or activity.

**What to Do If You Believe You Have Experienced Discrimination.**

If you think that you have been subjected to discrimination under a WIA Title I-financially assisted program or activity, you may file a complaint within 180 days from the date of the alleged violation with either: the recipient's Equal Opportunity Officer (or the person whom the recipient has designated for this purpose); or the Director, Civil Rights Center (CRC), U.S. Department of Labor, 200 Constitution Avenue NW, Room N-4123, Washington, DC 20210.

If you file your complaint with the recipient, you must wait either until the recipient issues a written Notice of Final Action, or until 90 days have passed (whichever is sooner), before filing with the Civil Rights Center (see address above). If the recipient does not give you a written Notice of Final Action within 90 days of the day on which you filed your complaint, you do not have to wait for the recipient to issue that Notice before filing a complaint with CRC. However, you must file your CRC complaint within 30 days of the 90-day deadline (in other words, within 120 days after the day on which you filed your complaint with the recipient). If the recipient does give you a written Notice of Final Action on your complaint, but you are dissatisfied with the decision or resolution, you may file a complaint with CRC. You must file your CRC complaint within 30 days of the date on which you received the Notice of Final Action.

**FOR INFORMATION OR TO FILE A COMPLAINT, CONTACT:**

Name: Jan Filgas

Address: 365 Warner Milne Road, Suite 202, Oregon City, OR 97045

Phone: (503) 657-1730

Equal opportunity employer with equal opportunity programs.

Auxiliary aids and services are available upon request to individuals with disabilities.

This policy will remain in effect from the date of issue until such time that a revision is required.



## ATTACHMENT II

**IGUALDAD DE OPORTUNIDADES ES LA LEY**

Es contra la ley para este recipiente o agencia de asistencia financiera federal discriminar basado en lo siguiente: Contra cualquier individuo en los Estados Unidos por razones de raza, color, religión, origen nacional, edad, incapacidad, afiliación política o creencia; y contra cualquier beneficiario de programas de asistencia financiera bajo el Título I del Acta de Inversión en la Fuerza Laboral de 1998 (Workforce Investment Act of 1998, WIA), por razones de ciudadanía/estado legal del beneficiario como un inmigrante legalmente admitido y autorizado para trabajar en los Estados Unidos, o su participación en cualquiera de los programas o actividades de asistencia financiera del Título I del Acta de Inversión en la Fuerza Laboral (WIA).

El recipiente o agencia no debe de discriminar en ninguna de las siguientes áreas: Decidiendo quien va a ser admitido, o tener acceso, a cualquier programa o actividad financiados por el Título I del Acta de Inversión en la Fuerza Laboral; o proveyendo oportunidades en, o negociando con, cualquier persona con relación a tal programa o actividad; o haciendo decisiones de empleo en la administración de, o en conexión con, tal programa o actividad.

**QUE HACER SI CREE QUE HA EXPERIMENTADO DISCRIMINACION**

Si usted cree que ha sido sujeto a discriminación en algún programa o actividad financiados bajo el Título I del Acta de Inversión en la Fuerza Laboral (WIA), usted puede someter una queja dentro de 180 días desde la fecha en que ocurrió la violación que alega, con cualquiera de los dos:

El(la) Oficial de Igualdad de Oportunidades (Equal Opportunity Officer) del recipiente o agencia (o la persona que el recipiente o agencia ha designado con este propósito); o El (La) Director(a), Centro de Derechos Civiles (Director, Civil Rights Center, CRC), US Department of Labor, 200 Constitution Ave. NW, Room N-4123, Washington, D.C. 20210.

~ Si usted presenta una queja con el recipiente o agencia, usted debe esperar hasta que el recipiente o agencia le de por escrito un aviso de acción final, o hasta que hayan pasado 90 días (cualquiera que ocurra primero), antes de presentar una queja con el Centro de Derechos Civiles (vea la dirección arriba). ~ Si el recipiente o agencia no le da un aviso de acción final por escrito, dentro de los 90 días desde el día en que usted presentó su queja, usted no debe de esperar hasta que el recipiente o agencia le de el aviso antes de presentar su queja al Centro de Derechos Civiles. Sin embargo, debe presentar su queja al Centro de Derechos Civiles dentro de 30 días después de la fecha límite de 90 días. (en otras palabras, dentro de 120 días después del día en que usted presentó su queja con el recipiente o agencia). ~ Si el recipiente o agencia le da un aviso escrito de acción final de su queja, pero usted no está satisfecho(a) con la decisión o resolución, usted puede presentar una queja con el Centro de Derechos Civiles. Usted debe presentar su queja dentro de 30 días desde la fecha en que recibió el aviso de acción final.

***PARA OBTENER INFORMACION O PRESENTAR UNA QUEJA, CONTACTE A:***

Name: Jan Filgas

Address: 365 Warner Milne Road, Suite 202, Oregon City, OR 97045

Phone: (503) 657-1730

Igualdad en programas y oportunidades de empleo

Equipo y servicios auxiliares para personas con impedimentos estan disponibles al pedirlos

This policy will remain in effect from the date of issue until such time that a revision is required.



13. Encourage partnerships with public and private agencies serving disabled and minority persons to encourage referrals to WIA services.
14. Include the State of Oregon's listing of minority and female vendors and organizations representing the disabled on bidders lists for contracts issued pursuant to WICCO procurement policy.
15. Comply with State requirements regarding the collection, maintenance, and confidentiality of data for each applicant/registrant, trainee, applicant for employment and employee.
16. Comply with WICCO policy and the Oregon Methods of Administration in adopting standards and procedures for providing services and for responding to complaints of discrimination.

Approved:

  
\_\_\_\_\_  
WICCO Board Chair

  
\_\_\_\_\_  
Date

**ATTACHMENT A**

Local Workforce Area/Region: WICCO Region 15

**WorkSource Oregon Center/Affiliate Site:** WorkSource Clackamas/Annex

**Please note which workforce partner(s) provide(s) the following services at each site. If not applicable, please note “N/A”.**

<b>Services</b>	<b>WIA Title 1B</b>	<b>WIA Title 1-D Vets</b>	<b>WIA Title II</b>	<b>WIA Title III</b>	<b>VR</b>	<b>DHS</b>	<b>Other</b>
Eligibility Determination for WIA Title IB Services							<b>State</b>
Outreach, intake, and orientation to the information and services available through the WorkSource Oregon delivery system	X			X	X	X	
Initial Assessment of Skills	X		X		X	X	State
Initial Assessment of Need for Support Services	X			X	X	X	
Referral to Unemployment Insurance	X			X	X	X	
Labor Market Information	X		X	X	X	X	
Provide referral to TANF	X			X	X	X	
Help access federal Financial Aid	X			X	X	X	
Job Search and Placement Assistance	X			X	X	X	
Career Exploration	X			X	X	X	
Provide Information on Availability of Support Services	X			X	X	X	
Performance Outcomes and Cost Information on Eligible Training Providers	X						
Tracking of Local Performance Measures	X			X	X	X	
Services to Veterans	X		X	X	X	X	
Business Engagement	X			X	X	X	
Claimant Reemployment				X			
Migrant Seasonal Farm Worker (MSFW) Services				X			
Reemployment Eligibility Assessment (REA)				X	X		
Self-Employment Assistance (SEA)				X			
WIA Title 1B Follow-up Services (after Exit)							
Intensive Services (indicate what service)	X		X		X	X	
Development of an IEP, ABE, GED, Work Experience, ESL, short term pre-vocational trainings							
Training Services (indicate what service)							
OJT, short and long term training	X				X	X	
Support Services (indicate what service)	X				X	X	
Transportation, emergency rental assistance and utilities, tools, books, supplies, clothing							



**Total Staff Levels in FTEs (Current)**

<i>One Stop Centers and Affiliate Sites (Identify by Location)</i>	<i>WIA Core Services</i>			<i>WIA Intensive Services</i>			<i>Other</i>		
	<i>Wagner-Peyser Staff</i>	<i>WIA Title 1-B Staff</i>	<i>Other Partners (identify)</i>	<i>Wagner-Peyser Staff</i>	<i>WIA Title 1-B Staff</i>	<i>Other Partners (identify)</i>	<i>Wagner-Peyser Staff</i>	<i>WIA Title 1-B Staff</i>	<i>Other Partners (identify)</i>
WorkSource Clackamas	9				3.15		10		

**Management & Administrative Staffing Across All One Stop Centers and Affiliate Sites (Current)**

<i>Management/Administrative Staff (Identified by Partner, i.e., Wagner-Peyser, Title I-B, TANF, etc.)</i>	<i>Total FTEs</i>
Management Staff	2.25
Administrative Staff	2
<b>Total for the LWIA</b>	<b>26.4</b>

**ATTACHMENT E**

**WORKFORCE INVESTMENT ACT TITLE I-B  
BUDGET, PARTICIPANT and PERFORMANCE PLAN for PY 2012**

<b>Service Categories</b>	<b>Projected Number of Participants Who Will Receive at Least One Staff-Assisted Service*</b>	<b>Participant Carry-In by Program Year</b> (e.g. X# = PY 10; X# = PY 11)**	<b>Funding Allocation</b>	<b>Indicator of Performance (TEGL 17-05)</b>	<b>LWIA Performance Target</b>
<b>Adults</b>	2594	556	\$780,382	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Dislocated Workers</b>	9124	5856	\$883,375	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Youth</b>	580 (active & follow-up)	250	\$794,697	Placement in Employment or Education	70%
				Attainment of a Degree or Certificate	69%
				Literacy and Numeracy Gains	31%

Adults and Dislocated Workers

\*This is the total projected number of Adults (or DWs) who will receive services funded under Title I other than self-service or informational activities.

\*\* Total number of Adults (or DWs) enrolled in previous year/s carried forward, by Program Year.

Youth

\* This is the total projected number of Youth planned to be enrolled in the Program Year.

\*\* Total number of Youth enrolled in previous year/s carried forward.

NOTE: This attachment must be submitted for each year of the plan and attached to any modification request to CCWD.

**ATTACHMENT E**

**WORKFORCE INVESTMENT ACT TITLE I-B  
BUDGET, PARTICIPANT and PERFORMANCE PLAN for PY 2013**

<b>Service Categories</b>	<b>Projected Number of Participants Who Will Receive at Least One Staff-Assisted Service*</b>	<b>Participant Carry-In by Program Year</b> (e.g. X# = PY 10; X# = PY 11)**	<b>Funding Allocation</b>	<b>Indicator of Performance (TEGL 17-05)</b>	<b>LWIA Performance Target</b>
<b>Adults</b>	2594	556	\$780,382	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Dislocated Workers</b>	9124	5856	\$883,375	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Youth</b>	580 (active & follow-up)	230	\$794,697	Placement in Employment or Education	70%
				Attainment of a Degree or Certificate	69%
				Literacy and Numeracy Gains	31%

Adults and Dislocated Workers

\*This is the total projected number of Adults (or DWs) who will receive services funded under Title I other than self-service or informational activities.

\*\* Total number of Adults (or DWs) enrolled in previous year/s carried forward, by Program Year.

Youth

\* This is the total projected number of Youth planned to be enrolled in the Program Year.

\*\* Total number of Youth enrolled in previous year/s carried forward.

NOTE: This attachment must be submitted for each year of the plan and attached to any modification request to CCWD.

**ATTACHMENT E**

**WORKFORCE INVESTMENT ACT TITLE I-B  
BUDGET, PARTICIPANT and PERFORMANCE PLAN for PY 2014**

<b>Service Categories</b>	<b>Projected Number of Participants Who Will Receive at Least One Staff-Assisted Service*</b>	<b>Participant Carry-In by Program Year</b> (e.g. X# = PY 10; X# = PY 11)**	<b>Funding Allocation</b>	<b>Indicator of Performance (TEGL 17-05)</b>	<b>LWIA Performance Target</b>
<b>Adults</b>	2594	556	\$780,382	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Dislocated Workers</b>	9124	5856	\$883,375	Entered Employment Rate	57%
				Retention Rate	80%
				Average Earnings	\$13,400
<b>Youth</b>	580 (active & follow-up)	230	\$794,697	Placement in Employment or Education	70%
				Attainment of a Degree or Certificate	69%
				Literacy and Numeracy Gains	31%

Adults and Dislocated Workers

\*This is the total projected number of Adults (or DWs) who will receive services funded under Title I other than self-service or informational activities.

\*\* Total number of Adults (or DWs) enrolled in previous year/s carried forward, by Program Year.

Youth

\* This is the total projected number of Youth planned to be enrolled in the Program Year.

\*\* Total number of Youth enrolled in previous year/s carried forward.

NOTE: This attachment must be submitted for each year of the plan and attached to any modification request to CCWD.

**MEMORANDUM OF UNDERSTANDING**  
**between**  
**WORKFORCE INVESTMENT COUNCIL OF CLACKAMAS COUNTY**  
**CLACKAMAS COUNTY BOARD OF COMMISSIONERS**  
**and CLACKAMAS COUNTY ONE-STOP PARTNERS**  
**Pursuant to the Workforce Investment Act of 1998**

**OVERVIEW AND PURPOSE**

This Memorandum of Understanding which includes the resource sharing plan and agreement is entered into by the workforce development partner organizations and programs, the Workforce Investment Council of Clackamas County (WICCO), and the Clackamas County Board of Commissioners to provide a framework for the delivery of comprehensive workforce development services to the job-seeker and employer communities of Clackamas County. The One-Stop system has been designed to promote collaborative economic and workforce investment strategies reflecting the particular needs of Clackamas County's local and regional economies and builds upon a framework of service delivery through the comprehensive One-Stop Center and a collaborative network of partner organizations. Region 15 utilizes the Worksource Oregon logo and identity.

This Memorandum of Understanding contains the following sections:

- I. PARTIES TO THE AGREEMENT
- II. ONE-STOP WORKFORCE SYSTEM
- III. REFERRAL PROCESS
- IV. FUNDING
- V. GENERAL TERMS AND CONDITIONS
- VI. ASSURANCES AND CERTIFICATIONS
- VII. SIGNATURE(S)

**I. PARTIES TO THE AGREEMENT**

<b>Organization</b>	<b>Representation</b>
Clackamas County Board of Commissioners	Chief Local Elected Official
Workforce Investment Council of Clackamas County	Workforce Investment Board
Clackamas Community College	Representing programs authorized under WIA Title IB (Adult and Dislocated Worker) and Title II (Adult Literacy)

Region 15 MOU

January, 2013 thru December, 2017

Clackamas County Social Services	Representing programs authorized under Housing and Urban Development, Community Services Block Grant (CSBG), and the County Veterans Officer for services to veterans, also Developmental Disability services and services to seniors through the Older Americans Act.
Clackamas Education Service District	Representing programs authorized under the Carl Perkins Act and programs authorized under the WIA, Title IB (Youth).
Oregon Employment Department	Representing programs authorized under the Wagner Peyser Act, programs authorized under State Unemployment Compensation Laws, Trade Adjustment Assistance and NAFTA Transitional Assistance Activities authorized under Chapter 2 of Title II of the Trade Act; Local Veterans Employment Representatives and Disabled Veterans' Outreach Programs
Oregon Department of Human Services: Self Sufficiency	Representing programs authorized under Temporary Assistance to Needy Families, Supplemental Nutrition Assistance Program (SNAP), Medicaid and state funded programs including the Oregon Health Plan.
Oregon Department of Human Services, Office of Vocational Rehabilitation	Representing programs authorized under Title IV of WIA and Title I of the Rehabilitation Act
Job Corps Agent for recruitment and placement, DESI	Representing programs authorized under the WIA, Title IC

Community Solutions for Clackamas County	Representing referrals and delivery for workforce services from Department of Human Services, Clackamas County Mental Health & Office of Vocational Rehabilitation, WIA and Clackamas County Corrections.
Easter Seals Oregon	Representing Title V of the Older Americans Act, Job Search Assistance, Completing Applications and Resumes, Referrals to other appropriate partners or community services, information and referral to supportive services, Interview training, Provide work experience
Express Professionals	Interested party; For-profit staffing service
Housing Authority of Clackamas County	Interested party
Immigrant and Refugee Community Organization (IRCO)	Interested party
Clackamas County Community Corrections	Interested party

## II. ONE-STOP WORKFORCE SYSTEM

Workforce development services are provided through a network of partner organizations and service providers. WorkSource Clackamas —the Clackamas County One-Stop Resource Center, a part of Worksource Oregon— is centrally located at 506 High Street, Oregon City, Oregon. The One-Stop partner programs, with leadership from the Workforce Investment Council, have planned and designed a collaborative approach to the provision of a wide-ranging array of services to customers, both within the comprehensive center and, through the use of value-added referrals, by each of the partner agencies and service providers.

The One-Stop Operator Team is comprised of the management or designated staff of the mandatory partner programs and interested parties. At the time of Region 15 MOU

this agreement, the Governance Team includes staff from the following partner programs: Clackamas Community College; Clackamas County Department of Social Services; Oregon Employment Department, Oregon Department of Human Services- Self Sufficiency; Oregon Department of Human Services- Vocational Rehabilitation; Clackamas Education Service District; Job Corps Center (Dynamic Educational Systems, Inc., DESI as their agent); Community Solutions for Clackamas County, Easter Seals Oregon, Clackamas County Community Corrections, Housing Authority of Clackamas County, Immigrant and Refugee Community Organization (IRCO), Express Employment Professionals, and the Workforce Investment Council. The One-Stop Operator Team maintains the MOU and RSA Each team member is its agency's liaison and will be responsible for ensuring the interpretation and implementation of agency policies and procedures are reflected and addressed in the One Stop Resource Center workflow and procedures. In the event that a policy or financial issue needs to be resolved, it will be forwarded in writing to the workforce Investment Council.

### **III. REFERRAL PROCESS**

All customers receiving services either within the One-Stop Center or at any of the partner organizations will have access to the full array of workforce development services within the One-Stop delivery system. The parties have agreed to use "value-added" referrals between the parties and have agreed to follow the processes and procedures for such referrals as adopted by the Workforce Investment Council. Referrals within the Center are based on customer chosen or requested choices. Referrals may also be made to partner agencies for services not available within the Center.

In addition, staff may assist customers to set appointments and may conduct follow-up with either the customer or the partner agency to ensure customer satisfaction.

### **IV. FUNDING**

The parties agree to provide funding for the shared costs of the partnership in accordance with the Resource Sharing Plan (RSP). The RSP is incorporated into this MOU by reference.

### **V. GENERAL TERMS AND CONDITIONS**

The following terms and conditions are agreed to by the parties:

Duration: The MOU shall commence January 1, 2013 and shall remain in effect through December 31, 2017, the MOU may be renewed upon approval of the parties for a period of one additional year and may be amended in accordance with agreed upon procedures, subject to approval by the State.

Disputes: If disputes arise related to the terms of this MOU, the parties agree to abide by the Workforce Investment Council's Mediation/Conflict Resolution Process. Should such process fail to resolve the dispute, the parties agree to follow the process described in OWIB Policy—MOU Impasse Resolution.

Modification: The MOU constitutes the entire agreement between the parties and may be modified, revised, or amended by mutual written consent of all the signatory parties based on legislative and system design changes, the addition of parties to the agreement, governing board direction, or other reasons as agreed to by the parties. The modification will be effective upon the issuance of a written amendment, signed and dated by the parties.

Termination: Any party to this agreement may terminate their participation in this MOU upon 60 calendar days written notice to all other parties to the agreement. In such case, termination by one or more of the parties does not alter the terms or obligations of any other party to the agreement.

### **Responsibility for Employees**

All employees providing services through the One-Stop delivery system remain under the supervision and direction of their respective employing entity. If work-related issues arise at the One-Stop Resource Center, the incident will be reported to the appropriate partner program supervisor for resolution.

### **Responsibility for Employment and Other Related Benefits and Deductions**

Each party, with respect to its officers and employees, shall be exclusively responsible for providing for employment-related benefits and deductions that are required by law, including but not limited to federal and state income tax deductions, workers' compensation coverage, unemployment insurance coverage and contributions to the Public Employees Retirement System, if contributions are required.

### **No Third Party Beneficiaries**

The parties signing this Agreement are the only parties to the Agreement and are the only parties entitled to enforce its terms. Nothing in this Agreement gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Agreement.

### **Confidentiality and Compliance with the law**

Parties to this agreement warrant that it will comply with the provisions of the Workforce Investment Act and other applicable federal and Oregon laws, regulations and administrative rules including, but not limited, to those relating to confidentiality of customer records.

## Assignments

If a party to this agreement assigns any or all duties and responsibilities under this MOU to another entity, the assignor shall require the assignee to abide by the terms of the agreement if they are applicable to that assignee's new duties and responsibilities under the assignment.

## VI. ASSURANCES AND CERTIFICATIONS

Each signatory to the MOU which is a recipient of federal financial assistance as defined in 29 CFR Sec. 37.4, assures that it will comply with:

1. The state's Methods of Administration approved by the federal Department of Labor (located at [www.workforce.state.or.us](http://www.workforce.state.or.us)); and
2. The nondiscrimination and equal opportunity provisions of the following laws:
  - a. Section 188 of the Workforce Investment Act (WIA) and 29 CFR Part 37 which prohibits discrimination against all individuals in the United States on the basis of race, color, religion, sex, national origin, age, disability, or political affiliation or belief and against beneficiaries on the basis of either citizenship/status as lawfully admitted immigrants authorized to work in the United State or participation in any WIA Title I financially assisted program or activity;
  - b. Title VI of the Civil Rights Act of 1964 as amended (42 USC Sec. 2000d et seq.), which prohibits discrimination on the bases of race, color and national origin;
  - c. Section 504 of the Rehabilitation Act of 1973 as amended (29 USC 794), which prohibits discrimination against qualified individuals with disabilities;
  - d. Age Discrimination Act of 1975 as amended (42 USC Sec. 6101 et seq.), which prohibits discrimination on the basis of age; and
  - e. Title IX of the Education Amendments of 1972 as amended (20 USC Sec. 1681 et seq.), which prohibits discrimination on the basis of sex in educational programs.

### Responsibility for Funds

Each party is liable for any misuse of funds caused by or resulting from its or its officers', employees' or agents' actions or omissions under or relating to this Agreement. Each party is liable for, and shall indemnify the other parties for, any misuse of funds caused by or resulting from its or its officers', employees' or agents' actions or omissions under or relating to this Agreement.

### Responsibility for Torts

Each party shall be responsible only for the tortious acts, omissions or negligence of its own officers, employees or agents. Subject to Article XI, section 7 or 10 of the Oregon Constitution, if the party is the State or a county, it is responsible only to the extent required by the Oregon Tort Claims Act, ORS 30.260 to 30.300. If the party is any other "public body," as defined in ORS

30.260, it is responsible only to the extent required by the Oregon Tort Claims Act.

**Responsibility for Comprehensive Liability Insurance and Property Damage Insurance.**

Each party to this Agreement shall obtain, and at all times keep in effect, comprehensive liability insurance and property damage insurance covering its and its officers', employees' or agents' tortious acts, omissions or negligence under this Agreement. Any "public body," as defined in ORS 30.260, may satisfy these requirements in any manner allowed by ORS 30.282. Such public body liability and property damage insurance, whatever the form, shall be in an amount not less than the limits of public body tort liability specified in ORS 30.270. For all other parties, the insurance shall have a combined single limit per occurrence of not less than \$1,000,000. Insurance coverage may not be cancelled, materially changed, reduced or not renewed without 30 days prior written notice from the party to the Workforce Investment Council. In the event of unilateral cancellation or restriction by the insurance company of the insurance policy, the public body or other party shall immediately notify the Workforce Investment Council verbally and in writing.

Attachment F  
**TABLE I**

**Preliminary Services**—provided by all staff assigned to One-Stop activities (subsequent to initial cross-training and orientation)

Partner Agency	Services
Clackamas Community College (CCC)	<ol style="list-style-type: none"> <li>1) WIA Core services:               <ol style="list-style-type: none"> <li>a) Determination of eligibility and suitability to receive additional services (beyond WIA core);</li> </ol> </li> <li>2) Outreach, intake and orientation to the information and other services available through the WorkSource system;               <ol style="list-style-type: none"> <li>a) Referrals to other appropriate partner or community services</li> <li>b) Information on applying for Unemployment Insurance</li> <li>c) Information on Federal Application for Financial Aid and scholarships</li> </ol> </li> <li>3) Initial assessment of skill levels, aptitudes, abilities, and supportive service needs;               <ol style="list-style-type: none"> <li>a) information on the Initial Skills Review and access to WIN and CIS</li> </ol> </li> <li>4) Employment statistics information relating to local, regional, and national labor market areas, including job vacancy listings, information on job skills necessary for these positions, and information relating to local occupations in demand and the earnings and skill requirements for these occupations.</li> <li>5) Follow-up services, including counseling regarding the workplace, for participants in WIA activities who are placed in unsubsidized employment, for not less than 12 months after the first day of the employment, as appropriate.</li> <li>6) Additional services may include;               <ol style="list-style-type: none"> <li>a) Career Counseling</li> <li>b) On line college catalog and schedules</li> <li>c) Rapid Response Information</li> <li>d) Employer Services</li> <li>e) Trade Act information</li> </ol> </li> </ol>
DHS—Vocational Rehabilitation Program (DHS-VR)	<ol style="list-style-type: none"> <li>1) Make information available to participants about VR eligibility requirements, potential services for eligible individuals, and explain that any potential services must be related to impediments.</li> </ol>

Attachment F  
**TABLE I**

Partner Agency	Services
	2) Make appropriate referrals to the VR office associated with the one-stop center. 3) Make VR materials available to participants including: informational brochures and flyer containing information on when and where orientation for services occurs, and directions and/or phone number to OVRS office.
OED	1) Assistance in beginning services listed in II below 2) Pilot for sharing job orders and referrals with partners 3) Rapid Response Lead 4) Referral to employer job openings 5) Intake and orientation to the information and other services available through the WorkSource system; a) Referrals to other appropriate partner or community services b) Information on applying for Unemployment Insurance 6) Employment statistics information relating to local, regional, and national labor market areas, including job vacancy listings, information on job skills necessary for these positions, and information relating to local occupations in demand and the earnings and skill requirements for these occupations. 7) Initial assessment of skill levels, aptitudes, abilities, and supportive service needs; a) information on the Initial Skills Review and access to WIN and CIS 8) Trade Act Information 9) Labor Market information
ESD (Title IB WIA Youth Services)	1) Provide information on services available to youth ages 14-21 through C-TEC Youth Services and its partners. 2) Ensure application and youth program information are readily available at One-stop 3) Provide a link to one-stop services for youth enrolled in WIA youth program 4) Promote the services available through the one-stop to WIA youth program participants 5) Communicate training and job opportunities available through the One-stop that are appropriate for youth
JC (Job Corps (DESI))	1) Educate youth about the Job Corps program, to include information about: eligibility requirements, education and job training opportunities, and follow-up and placement

Attachment F  
**TABLE I**

<b>Partner Agency</b>	<b>Services</b>
	<p>services.</p> <ol style="list-style-type: none"> <li>2) Refer interested youth to appropriate Job Corps <i>Outreach and Admissions</i> staff.</li> <li>3) Register Job Corps students and communicate training and job opportunities available through the One-stop.</li> <li>4) Provide Job Corps students assistance with job search, employment applications and resumes.</li> </ol>
Easter Seals Oregon	<ol style="list-style-type: none"> <li>1) Provide information on Title V Older Worker Program for job seekers and employers.</li> <li>2) Provide Title V recruitment, orientation, eligibility determination and assessment.</li> </ol>
IRCO	<ol style="list-style-type: none"> <li>1) IRCO staff assists customers with initial IMatchSkills process and provide one on one orientation delivering information about all available services offered through One Stop Center.</li> <li>2) IRCO staff makes appropriate referrals to services within the Center upon completion of data collection form.</li> </ol>

Attachment F  
**TABLE II**

Services provided by Partner Agency staff at the Clackamas County One-Stop Resource Center in support of each agency's mission and responsibilities:

Partner Agency	Services
Clackamas Community College CCC	<ol style="list-style-type: none"> <li>1) All listed in I, and</li> <li>2) Intensive WIA Services               <ol style="list-style-type: none"> <li>a) Career Planning</li> <li>b) Individual Employability Plan development</li> <li>c) Individual Counseling</li> <li>d) Comprehensive Assessment :                   <ol style="list-style-type: none"> <li>(1) (Career, language, literacy, college placement, etc.)</li> </ol> </li> </ol> </li> <li>3) Workshops:               <ol style="list-style-type: none"> <li>a) Career Counseling and Planning</li> <li>b) Educational planning</li> <li>c) Networking</li> </ol> </li> <li>4) Job Search skills               <ol style="list-style-type: none"> <li>a) Resume</li> <li>b) Interviewing skills</li> <li>c) Other Employment Related Skills</li> </ol> </li> </ol>
DHS—Vocational Rehabilitation Program (DHS-VR)	<ol style="list-style-type: none"> <li>1) Services for program eligible individuals:               <ol style="list-style-type: none"> <li>a) Initial intake</li> <li>b) Vocational Counseling</li> <li>c) Explore disability related employment impediments.</li> <li>d) Career Exploration</li> <li>e) Job Search Assistance</li> <li>f) Employment Follow-Up</li> </ol> </li> <li>2) Assist with partner training on the vocational rehabilitation process.</li> <li>3) VR staff out stationed at Oregon City One Stop at least twice per month</li> </ol>
OED	<ol style="list-style-type: none"> <li>1) Intake</li> <li>2) Orientation</li> <li>3) Initial assessment of skills</li> </ol>

Attachment F  
**TABLE II**

Partner Agency	Services
	4) Labor market info..(OLMIS) 5) Career Counseling 6) Job search assistance 7) Job listings/ job referrals 8) Info and referral to supportive services 9) Info on Partner Services 10)Info on financial aid 11)Info on filing UI 12)Resource room – Create resumes, research employers, view job boards, explore internet resources, print and fax
ESD (Title IB WIA Youth Services)	1) Completing youth eligibility screening 2) Referral to youth WIA providers to conduct eligibility and discuss program appropriateness 3) Informing consumer of documentation needed to verify eligibility 4) Educate the consumer about the structure of, activities offered, and services available through the youth program
Job Corps (DESI)	1) Outreach: Educate youth about the Job Corps program and refer interested youth to appropriate Job Corps <i>Outreach and Admissions</i> staff. 2) Register Job Corps students and communicate training and job opportunities available through the One-stop. 3) Provide Job Corps students assistance with job search, employment applications and resumes. 4) Provide all youth with the information needed to make appropriate independent living, training and employment choices, including: <ul style="list-style-type: none"> <li>a) Assistance with use of all the services available at the One-Stop,</li> <li>b) Classes/workshops (coordinated with other service providers to meet the needs at the One-Stop) to include:               <ul style="list-style-type: none"> <li>i) Women In Non-Traditional Trades</li> <li>ii) Career Planning</li> </ul> </li> </ul>

Attachment F  
**TABLE II**

Partner Agency	Services
	<ul style="list-style-type: none"> <li>iii) Job Search</li> <li>iv) Interviewing</li> <li>v) Completing employment applications and resumes</li> <li>vi) Money Management</li> <li>vii) Housing</li> <li>c) One-on-one assistance within all of the topics listed in <i>b.i-vii</i> above.</li> </ul>
Easter Seals Oregon	1) Provide assistance with center resources; Job Search Assistance, Completing Applications and Resumes, Referrals to other appropriate partners or community services, information and referral to supportive services, Interview training, Provide work experience
Housing Authority of Clackamas County	1)Referrals for Section 8 and Public Housing Residents to One Stop Resource Center
IRCO	<p>1) IRCO / Clackamas Works! Program in partnership with the Workforce Investment Council representing program authorized under WIA Title 1B (Adult and Dislocated Worker). The program is designed to enhance career development, training and employment services to non- English speakers over 18 years of age residing in Clackamas county. Services:</p> <ul style="list-style-type: none"> <li>a) Eligibility determination and program orientation</li> <li>b) Skill assessment</li> <li>c) Individual employment / career plan</li> <li>d) Supportive services</li> <li>e) Training services</li> <li>f) Individual counseling and career planning</li> <li>g) Employment services and</li> <li>h) Retention services</li> </ul> <p>2) Program annual enrollment is 30 participants.</p> <p>3) Majority of program participants have limited English proficiency, program provides intensive case management, supporting and leading participants to economic self-sufficiency.</p>
Express Employment Professionals	<ul style="list-style-type: none"> <li>1) Advanced workshop series</li> <li>2) Resume critique (in lab)</li> <li>3) Support and instruction of social media</li> </ul>

Attachment F  
**TABLE II**

<b>Partner Agency</b>	<b>Services</b>
	4) Rural outreach of workshops

Attachment F  
**TABLE III**

**Additional services** provided through **referral** or at Partner Agency locations:

<b>Partner Agency</b>	<b>Services</b>
CCC	<ol style="list-style-type: none"> <li>1) promotion and preparation and testing for The National Career Readiness Certification (NCRC)</li> <li>2) WIA Intensive Services:               <ol style="list-style-type: none"> <li>a) Comprehensive and specialized assessments of a customer’s skill levels and service needs, which may include diagnostic testing and the use of other assessment tools</li> <li>b) In-depth evaluation to identify employment barriers and employment goals;</li> <li>c) Development of an individual employment plan to identify appropriate objectives and combination of services for the customer to achieve the employment goals;</li> <li>d) Individualized career planning;</li> <li>e) Service planning for participants seeking intensive and training services</li> <li>f) Short-term prevocational services including development of skills in learning, communications, interviewing punctually, personal maintenance, and professional conduct to prepare individuals for unsubsidized employment or training;</li> <li>g) Targeted programs for basic skills and GED testing, ESL and vocational training, (includes case management.), Life and Career Options Program (LCOP)</li> </ol> </li> <li>3) Supportive services such as childcare, transportation, and work- and training related expenses.</li> <li>4) Group Networking and Job Search Boot Camp</li> <li>5) WIA Training Services:               <ol style="list-style-type: none"> <li>a) Occupational skills training, including training for nontraditional employment;</li> <li>b) On the Job Training</li> <li>c) Programs that combine workplace training with related instruction, which may include cooperative education programs;</li> <li>d) Training programs operated by the private sector;</li> <li>e) Skills upgrading and retraining;</li> <li>f) Entrepreneurial training;</li> <li>g) Career Pathways;</li> <li>h) Adult education and literacy activities provided in combination with other training</li> </ol> </li> </ol>

Attachment F  
**TABLE III**

Partner Agency	Services
	services; and i) Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion or the training; j) Vocational Training Programs in demand occupations; k) Provider of Title II programs including required matching funds.
Clackamas Co. Social Services	1) Core Services: a) Eligibility Determination b) Referrals to other appropriate partner or community services c) Intake d) Initial assessment of skill levels, aptitudes, and support services needed e) Job listings/Job referrals f) Job search assistance g) Information on One Stop Partner services h) Information on supportive services i) Information on applying for Unemployment Insurance 2) Intensive services: a) Case Management b) Career Planning
DHS—Vocational Rehabilitation Program (DHS-VR)	1) Services provided to eligible individuals at the OVRS site services are individually developed based on disability related impediment to work and a full assessment of client interest, concerns, capacities, aptitudes, priorities, unique strengths and informed choice: a) Job club b) Assessments ( aptitude & interest ) c) Vocational evaluations d) Medical/Psychological evaluations e) Work experience f) Training g) Medical / psychological restoration h) Accommodation identification and implementation

Attachment F  
**TABLE III**

Partner Agency	Services
	<ul style="list-style-type: none"> <li>i) Specialized placement services</li> <li>j) Job coaching services</li> <li>k) Motivational interview</li> </ul>
DHS-Self Sufficiency (DHS-SS)	<ul style="list-style-type: none"> <li>1) Self Sufficiency:               <ul style="list-style-type: none"> <li>a) Supplemental Nutrition Assistance Program (SNAP),</li> <li>b) Oregon Health Plan</li> <li>c) Employment Related Day Care</li> <li>d) TANF</li> </ul> </li> <li>2) Child Welfare:               <ul style="list-style-type: none"> <li>a) Family based services to support the safety of children in their home</li> <li>b) Child protective services to investigate and intervene in cases of abuse and neglect</li> </ul> </li> </ul>
OED	<ul style="list-style-type: none"> <li>1) Vocational guidance</li> <li>2) Veteran services</li> <li>3) Farmworker services</li> <li>4) Rapid response activities</li> <li>5) Trade Act and NAFTA</li> <li>6) Worker profiling</li> <li>7) Referrals to other appropriate partner or community services</li> <li>8) Job listings/Job referrals</li> <li>9) Job search assistance</li> <li>10) Information on One Stop Partner services</li> <li>11) Information on supportive services</li> <li>12) Information on applying for Unemployment Insurance</li> </ul>
ESD (Title IB WIA Youth Services)	<ul style="list-style-type: none"> <li>1) The program provides access to the 10 mandated elements of Workforce Investment Act Youth Programs               <ul style="list-style-type: none"> <li>a) Tutoring, study skills, and instruction leading to completion of secondary school</li> <li>b) Alternative Education Options</li> <li>c) Paid and Unpaid Work Experience</li> <li>d) Summer Employment</li> </ul> </li> </ul>

Attachment F  
**TABLE III**

Partner Agency	Services
	e) Occupational Skills Training f) Leadership opportunities g) Supportive Services h) Adult Mentoring i) Comprehensive Guidance and counseling j) Child care resource and referral 2) Follow-up for 12 months after completion of program activities
Job Corps (DESI)	1) Contract with WICS (Women in Community Service) to provide information and resources to current and previous Job Corps students on: a) Mentoring b) Career Counseling c) Housing d) Education e) Child Care f) Transportation g) Parenting h) Legal Services i) Budgeting j) Health Care k) Emergency Services 2) Placement Assistance. 3) All listed in Tables I & II
Easter Seals Oregon	1) Provide referral to other partner agencies
Housing Authority of Clackamas County	1) Resident services provided include referral to community resources and services, IDA and Escrow savings programs, youth development programs, senior community activities and mediation with housing issues.
Clackamas County Community Corrections	1) Provide supervision services to the client population that's placed on formal probation or post prison supervision. <ul style="list-style-type: none"> <li>• Risk and Needs Assessment completed (supervise at the field level medium and high</li> </ul>

Attachment F  
**TABLE III**

Partner Agency	Services
	<p>risk offenders). Refer these offenders out depending on their risk and needs assessment for:</p> <ul style="list-style-type: none"> <li>➤ job search</li> <li>➤ alcohol and drug treatment (outpatient, detox, inpatient, support services)</li> <li>➤ mental health services (including housing services)</li> <li>➤ transitional housing services</li> <li>➤ domestic violence services</li> <li>➤ sex offender services</li> <li>➤ cognitive programming (MRT, Thinking for a Change)</li> <li>• Victim's advocacy (for victim's of clients that we supervise) <ul style="list-style-type: none"> <li>➤ Women's Empowerment Program</li> <li>➤ Victim Services Coordinator</li> </ul> </li> <li>• Community Service Work Supervision (for formally supervised clients and bench probation clients)</li> </ul> <p>*****NOTE: Services available only for active probation and PPS clients of Clackamas County Community Corrections.</p>
IRCO	<ol style="list-style-type: none"> <li>1) Clackamas Works! Program makes appropriate referrals to other partners and community services for additional services needed.</li> <li>2) Clackamas Works! Program in collaboration with multiple IRCO programs and services provide full service and assistance to meet customers need.</li> </ol>
Express Employment Professionals	<ol style="list-style-type: none"> <li>1) Employment Options</li> <li>2) Advanced Job Search by Location</li> <li>3) Professional Job Placement</li> <li>4) Full-Service Job Testing &amp; Training Programs</li> </ol>

Attachment F  
**TABLE IV**

**Additional services** provided by the Partner Agencies in support of the One-Stop delivery system:

<b>Partner Agency</b>	<b>Services</b>
CCC	<ol style="list-style-type: none"> <li>1) Employer advisory committees for all technical professional programs</li> <li>2) Employer services, including Rapid Response activities</li> <li>3) Customer outreach in conjunction with team partners when seen as appropriate by the One-Stop Operator Committee</li> <li>4) Small Business Development Center</li> <li>5) Customized training and development services</li> <li>6) Technical Assistance</li> <li>7) Staff Training</li> <li>8) Regularly participate in WorkSource Partner meetings and contribute towards successful collaboration at the One-stop</li> </ol>
Clackamas Co. Social Services	<ol style="list-style-type: none"> <li>1) Presentations/participation in modules or trainings at the one-stop</li> <li>2) Program benefits counseling including social security programs</li> <li>3) Outreach and education in regard to the programs in the community</li> </ol>
OED	<ol style="list-style-type: none"> <li>1) Room for employer usage for interviewing</li> <li>2) Oregon Employer Council (OEC)</li> <li>3) Employer services, including Rapid Response activities</li> <li>4) Outreach/orientation services when the partners develop the program</li> <li>5) Regularly participate in WorkSource Partner meetings and contribute towards successful collaboration at the one-stop</li> </ol>
ESD (Title IB WIA Youth Services)	<ol style="list-style-type: none"> <li>1) Provide training to one-stop staff on Youth programs, eligibility requirements, and screening for appropriateness for the program</li> <li>2) Provide feedback to one-stop staff in ways to make one-stop user friendly and accessible to youth</li> <li>3) Consult in the coordination and delivery of youth workforce development activities</li> <li>4) Regularly participate in WorkSource Partner meetings and contribute towards successful collaboration at the one-stop</li> </ol>
Job Corps (DESI)	<ol style="list-style-type: none"> <li>1) Outreach and admissions.</li> <li>2) GED and high school diploma program.</li> </ol>

Attachment F  
**TABLE IV**

Partner Agency	Services
	<ul style="list-style-type: none"> <li>3) BRIDGES eXcelerate Program for assessment of learning styles and identification and remediation of various physical barriers to learning.</li> <li>4) Career assessment and exploration using the ASVAB program.</li> <li>5) Employment training in the following trades:               <ul style="list-style-type: none"> <li>a) Automotive (To be added soon. Date will be provided.)</li> <li>b) Business Technologies</li> <li>c) Carpentry</li> <li>d) Culinary Arts</li> <li>e) Electrical</li> <li>f) Facilities Maintenance/Wastewater Treatment</li> <li>g) Medical Assisting</li> <li>h) Painting</li> <li>i) Welding</li> </ul> </li> <li>6) Drivers Education.</li> <li>7) Residential living, with organized recreational activities.</li> <li>8) Health Services, including: the services of an on-site RN and regular medical, dental and mental health services.</li> <li>9) Substance/alcohol abuse counseling.</li> <li>10) Case Management.</li> <li>11) Personal and Career Counseling.</li> <li>12) Mentoring.</li> <li>13) Career preparation training that includes structured classes in the following subjects:               <ul style="list-style-type: none"> <li>a) Information Technology</li> <li>b) Career Planning</li> <li>c) Labor Market Information</li> <li>d) Job Search</li> <li>e) Interviewing</li> <li>f) Preparation of Employment applications, Cover Letters and Resumes</li> <li>g) Employability Skills</li> </ul> </li> </ul>

Attachment F  
**TABLE IV**

Partner Agency	Services
	<ul style="list-style-type: none"> <li>h) Use of One-Stop Career Centers, and</li> <li>i) Independent Living Skills.               <ul style="list-style-type: none"> <li>i) Formalized Social Skills training.</li> <li>ii) Clothing allowances.</li> <li>iii) Nominal weekly stipend; plus transition funds to program completers.</li> </ul> </li> <li>14) Placement assistance and up to 24-months follow-up and transition assistance.</li> </ul>
IRCO	IRCO / Clackamas Works! Program staff makes sure that customers receive full support in accessing workforce development services within the One Stop delivery system. Referrals, appointments and follow ups with the customer are conducted to ensure customer satisfaction.

  
\_\_\_\_\_  
(Signature) (Date)

Kim Parker, Executive Director  
Workforce Investment Council

  
\_\_\_\_\_  
(Signature) (Date)

Kim Freeman, Area Manager  
Oregon Employment Department

  
\_\_\_\_\_  
(Signature) (Date)

Joanne Truesdell, President  
Clackamas Community College

  
\_\_\_\_\_  
(Signature) (Date)

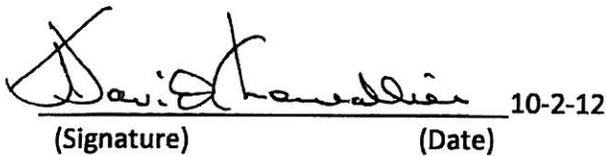
Patrick Foster, Branch Manager  
Office of Vocational Rehabilitation Services

  
\_\_\_\_\_  
(Signature) (Date)

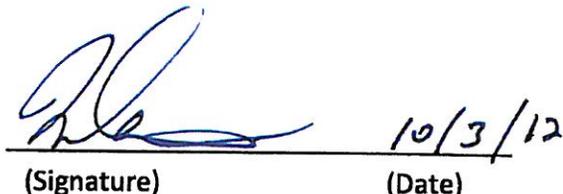
Fred Keene, Outreach & Admissions Mngr.  
Job Corps (DESI)

  
\_\_\_\_\_  
(Signature) (Date)

Jerry Buzzard, District Manager  
Oregon Department of Human Services

  
\_\_\_\_\_  
(Signature) (Date)

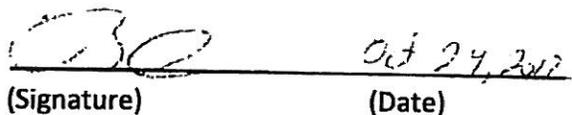
David Cheveallier, CEO  
Easter Seals

  
\_\_\_\_\_  
(Signature) (Date)

Milt Dennison, Superintendent  
Clackamas ESD  
C-TEC (Employment Made Possible)

  
\_\_\_\_\_  
(Signature) (Date)

Maureen Thompson, Director  
Community Solutions for Clackamas County

  
\_\_\_\_\_  
(Signature) (Date)

Brenda Durbin, Director  
Community Block Grant



10-25-12

(Signature) (Date)  
Victoria Libov, Community Project Manager  
IRCO



10/9/12

(Signature) (Date)  
Bryan Baker, Managing Partner  
Express Services, Inc.



10/23/12

(Signature) (Date)  
Trell Anderson, Executive Director  
Housing Authority of Clackamas County



10/03/12

(Signature) (Date)  
Chris Hoy, Captain of Probation/Parole  
Clackamas County Community Corrections

WorkSource Oregon One-Stop Center  
Resource Sharing Agreement  
July 1, 2012 – June 30, 2013  
(Addendum to MOU)

I. STATEMENT OF PURPOSE

The purpose of this agreement is to establish the terms and conditions under which the WorkSource Oregon Partners will allocate costs and share resources at the WorkSource Oregon Center located at: 506 High Street, Oregon City, OR 97045.

II. PARTIES TO THE AGREEMENT

The following partner organizations have agreed to provide services through the Region # 15 (WorkSource Clackamas) WorkSource Oregon Center and to share such costs that are of mutual benefit:

ORGANIZATION	PRIMARY FUNDING STREAM	PARTNER CONTACT INFORMATION
Partner A Oregon Employment Department (OED)	Wagner-Peyser Act	Tom Previs 506 High Street Oregon City, OR 97045 971 673-6415 Tom.a.previs@state.or.us
Partner B Workforce Investment Council of Clackamas County (WICCO)	WIA Title 1	Kim Parker 365 Warner Milne Road, Suite 202 Oregon City, OR 97045 503 657-1729 Kim.parker@wicco.org

III. DEFINITIONS

**Agreement Manager:** The person named by the partnership and LWIB to be responsible for the oversight, monitoring, reconciliation and review of fiscal functions of the Resource Sharing Agreement in accordance with WIA 662.300 and 662.310.

**System Shared Costs:** Those costs that benefit all One-Stop partners even if they are not co-located.

**Center Shared Costs:** Those costs of the one stop center that benefit multiple partners co-located at the center and are incurred in support of the services delivered through a OneStop. (DOL One Stop Comprehensive Financial Management Technical Assistance Guide; July, 2002)

## IV. SHARED COSTS AND BENEFIT

The One-Stop partners have identified one type of shared cost: Center costs that benefit the partners co-located at the Center.

CENTER COSTS	ANNUAL COST	BENEFITS
One-Stop greeter. Position greets and welcomes the public to the center directing clients to partners and services available at the Center. (.25fte) Worksource Liaison. Position facilitates the Clackamas Menu of Resources team and is the Equal Opportunity Coordinator for Region 15. (.25 fte)	\$38,652	The primary partners (OED and WICCO) agree that these are necessary costs that benefit both partners as well as supports the efforts of their shared customers.
TOTAL	\$38,652	

## V. ALLOCATION METHODOLOGY

The partners agree that SharedCosts equally benefit all the partners; therefore each partner will share an equitable portion of the costs.

## Center Shared Costs

PARTNER	%	\$
OED	53%	\$ 20,613
WICCO	47%	\$ 18,039
TOTAL	100%	\$38,652

## VI. RESOURCE SHARING PLAN

Each Region 15 One-Stop partner agrees to provide the resources necessary to fund their proportionate share of the agreed upon shared costs by providing goods and services as follows:

## Center Resources Sharing Plan

Cost Category	OED	WICCO	Total
.25 Salary and Fringe Benefits Program Manager Position		\$18,039	
.25 Salary and Fringe Benefits Business & Employ Specialist	\$20,613		
Totals	\$20,613	\$18,039	\$38,652

## AGREEMENT MANAGEMENT

The Agreement Manager responsible for oversight and review of shared costs for the Region 15 WorkSource Oregon Center, billing and reconciliation of shared costs, as well as monitoring of the allocation methodology and funding information is:

Name: Deb Zang  
Address: 365 Warner Milne Road, Suite 202, Oregon City, OR 97045  
Phone: 503 657-1728  
Fax: 503 657-6770  
E-Mail: [deb.zang@wicco.org](mailto:deb.zang@wicco.org)

## VII. MODIFICATIONS, RECONCILIATION AND ADJUSTMENTS

The partners recognize that modifications may be necessary during the period that the Resource Sharing Agreement is in effect. Any modification to the Resource Sharing Agreement will be undertaken collaboratively. Any modifications to this agreement must be in writing and signed by all the parties as identified in Section II. Oral modifications shall have no effect. If any provision of the agreement is held invalid, the remainder of the agreement shall not be affected.

All payments shall be made to the Fiscal Agent (Workforce Investment Council of Clackamas County). No costs will be incurred until the agreement is signed by all parties. Non-payments will be referred to the Local Workforce Investment Board for collection. All invoices for costs incurred will be provided to the Workforce Investment Board for approval, if requested. All payments including non-cash, goods and services (De-brief assistance to the Welcome Team) will be documented and retained by the Fiscal Agent for audits or other reconciliations. Goods and Services will be tracked by WorkSource Clackamas Center Leadership and reconciled by the Agreement Manager on a quarterly basis.

In the event program income is earned or reduced at the WorkSource Oregon Center as a result of shared costs or activities, that income must be distributed to all partner organizations that participated in the activity and must be allocated using the same basis as described in Section V of this document. Program income will be used to reduce each party's share of costs or resources needed to fund the shared costs identified in this agreement so long as it is allowable under the partner organization's authorizing statutes and regulations.

Reconciliation to actual costs and resource sharing will occur quarterly. Final reconciliation may be realized through the payment of cash or goods and services. A request for payment to either party shall be made within 60 days of the end of this agreement.

LWIB will maintain the information pertinent to this agreement.

#### VIII. DISPUTE RESOLUTION PROCESS

The parties shall first attempt to resolve all disputes informally. Any party may call a meeting of the WorkSource Oregon Center partners to discuss and resolve disputes. Should informal resolution efforts fail, the dispute shall be referred to the Chair of the Local Workforce Investment Board within 15 days, who shall place the dispute upon the agenda of a special meeting of the Board's Executive Committee. The Executive Committee shall attempt to mediate and resolve the dispute. Disputes shall be resolved in accordance with LWIB by-laws unless such a decision is in contradiction of applicable State and Federal laws or regulations governing the WorkSource Oregon Center partner agencies.

#### IX. TERMINATION

Withdrawal from the agreement requires ninety calendar days written notice to the other parties or thirty calendar days in the event of a major financial shortfall or non-appropriation of funds. Furthermore, upon the withdrawal of any party, the future costs associated with this agreement shall be reallocated among the remaining partners, and this agreement shall be modified in writing, accordingly.

#### X. TAX CERTIFICATION

By Workforce Investment Council of Clackamas County's signature(s) below they affirm they are authorized to act on behalf of their Agency and that, to the best of the undersigned's knowledge, not in violation of any Oregon Tax Laws. For purposes of this certification, "Oregon Tax Laws" means a state tax imposed by ORS 320.005 to 320.150 and 403-200 to 403.250, ORS Chapters 118 (Inheritance Tax), 314 (Income Tax), 316 (Personal Income Tax), 317 (Corporation Excise Tax), 318 (Corporation Income Tax), 320 (Amusement Device and Transient Lodging Taxes), 321 (Timber and Forestland Tax), 323 (Cigarettes and Tobacco Products Tax), and the elderly rental assistance program under ORS 310.630 to 310.706; and any local taxes administered by the Department of Revenue under ORS 305.620.

#### XI. TERMS OF AGREEMENT

This agreement shall be in effect July 1, 2012 through June 30, 2013. This agreement will be reviewed quarterly, and updated as necessary to ensure accuracy.

WORKSOURCE OREGON  
RESOURCE SHARING AGREEMENT  
AUTHORIZING SIGNATURES

The parties below attest to the following:

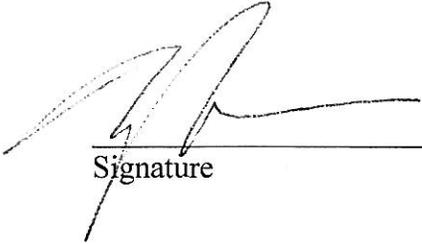
- Prior year RSA reconciliation has occurred and costs have been allocated.
- All parties have reviewed the reconciliation.
- Final billings have occurred.
- All parties to the RSA shall sign this document for it to be considered complete.

Partner A  
Oregon Employment Department

Partner B  
Workforce Investment Council

Kim Freeman Area Manager

Kim Parker Executive Director

  
\_\_\_\_\_  
Signature

10-26-12  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Signature

10-25-12  
\_\_\_\_\_  
Date

**WIA TITLE I-B  
ASSURANCES  
AND  
DISCLOSURE OF LOBBYING ACTIVITIES**

**FEDERAL GRANT ASSURANCES**

Each Grantee should carefully read and review the WIA Statute and Regulations related to this Assurances form. For purposes of this Grant Contract, “Contract” shall mean “Grant Contract” and “Contractor” shall mean “Grantee.”

The Contractor identified below, through its duly authorized representative, hereby assures and certifies that throughout the period of the grant /contract award and at all times while this Contract is in effect, it will comply with (as they may be amended from time to time), all applicable federal, state and local laws, regulations, ordinances, executive orders, administrative rules and directives, including without limitation: the Title IB of the Workforce Investment Act of 1998 (PL 105-220 29 USC Sec 2801 et seq) and corresponding WIA Regulations (20 CFR 660.300) OMB Circulars A-87 and A-133; all regulations and administrative rules established pursuant to the foregoing, all applicable Oregon Revised Statutes; and all applicable Oregon Administrative Rules.

Without limitation, Contractor assures and certifies that it:

1. Has the legal authority to apply for and receive funds, including federal and state funds, under the grants and programs covered by this Contract, and the institutional, managerial and financial capability (including funds sufficient to pay the non-federal share of project cost) to ensure proper planning, management and completion of the projects, grants and programs covered by this Contract.
2. With respect to Federal funds received by Contractor under this Contract, will comply with the cost principles determined in accordance with the provisions of OMB Circular A-87, “Cost Principles for State, Local and Indian Tribal Governments,” or A-21. “Cost Principles for Educational Institutions” or A-122, “Cost Principles for Non-Profit Organizations” as applicable based on the status of the entity receiving the Contract, and the cost related provisions of the corresponding regulations found in 29 CFR part 97, 29 CFR Part 95 or 48 CFR Part 31.
3. Will maintain and will permit the Agency, the Oregon Secretary of State’s Audit Division, the Oregon Department of Justice, the Federal Department of Labor, Employment and Training Administration through any authorized representative, access to and the right to examine and audit all records, books, papers or documents related to the awards or programs, to satisfy audit and program evaluation purposes and for all other lawful purposes; will establish a proper accounting system in accordance with generally accepted accounting standards and directives of the Federal awarding agencies; and will cause to be performed the required financial and compliance audits in accordance with the Single Audit Act

## Attachment H

Amendments of 1996 and OMB Circular No. A-133, "Audits of States, Local Governments, and Non-Profit Organizations."

4. Will not permit any person or entity to receive grant or program funds if the person or entity is listed on the non-procurement portion of the General Service Administration's list of parties excluded from federal procurement or non-procurement programs in accordance with Executive Order No. 12,549 and Executive Order No. 12,689 of the President of the United States.

5. Contractor will comply with the following:

A. This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by 31 USC section 1352. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.

B. The lobbying provisions of 34 CFR Part 82.

Contractor certifies, by signing this agreement to the best of his or her knowledge and belief, that no Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any Federal agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress in connection with the awarding of any Federal contract, the making of any Federal grant, the making of any Federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment or modification of any Federal contract, grant, loan, or cooperative agreement.

If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any Federal agency, a Member of Congress, an officer or employee of Congress or an employee of a Member of Congress in connection with this Contract, the undersigned shall complete and submit Standard Form-LLL, "Disclosure Form to Report Lobbying", in accordance with its instructions.

C. Contractor shall require certification of the foregoing from all recipients of grant or program funds by including it in and requiring that it be included in all contracts pursuant to which grant or program funds are paid.

6. Will establish safeguards to prohibit employees from using their positions for a purpose that constitutes or presents the appearance of personal or organizational conflict of interest, or personal gain.

7. Will initiate and complete the work within the applicable time frame after receipt of approval of the awarding Agency.

8. Will comply with all federal, state and local laws, regulations, executive orders, ordinances, administrative rules and directives relating to nondiscrimination. These include but are not limited to: (a) Title VI of the Civil Rights Act of 1964 (P.L. 88-352) which prohibits discrimination on the basis of race, color or national origin; (b) Title IX of the Education Amendments of 1972, as amended (20 U.S.C. §§1681-1683, and 1685-1686), which prohibits discrimination on the basis of sex; (c) Section 504 of the Rehabilitation Act

## Attachment H

of 1973, as amended (29 U. S. C. §794), which prohibits discrimination on the basis of handicaps; (d) the Age Discrimination Act of 1975, as amended (42 U. S. C. §§6101-6107), which prohibits discrimination on the basis of age; (e) The Americans with Disabilities Act of 1990 (42 U.S.C §§12131 et seq.), which protects qualified persons with disabilities from discrimination in employment opportunities and imposes requirements for construction, remodeling, maintenance and operation of structures and facilities; (f) Implementation of the Nondiscrimination and equal Opportunity Provisions of the Workforce Investment Act of 1998 (29 CFR Part 37); (g) ORS Chapter 659, as amended; (h) any other nondiscrimination provisions in the specific statute(s) under which application for federal assistance is being made; and, (i) the requirements of any other nondiscrimination laws, regulations, executive orders or ordinances which may apply to Applicant or the award or programs.

9. Will comply, as applicable, with the provisions of the Hatch Act (5 U.S.C. §§1501-1508 and 7324-7326) which limit the political activities of employees whose principal employment activities are funded in whole or in part with federal funds, unless exempt by the Hatch Act exclusion for individuals employed by an educational or research institution, establishment, agency, or system which is supported in whole or in part by a state or political subdivision thereof, or by a recognized religious, philanthropic, or cultural organization, as provided in 5 U.S.C. §1501(4) (B).

10. Will comply, as applicable, with the provisions of the Davis-Bacon Act (40 U.S.C. §§276a to 276a-7), the Copeland Act (40 U.S.C. §276c and 18 U.S.C. §874), and the Contract Work Hours and Safety Standards Act (40 U.S.C. §§327-333), regarding labor standards for federally-assisted construction subagreements.

11. Will comply with the applicable requirements of the federal Health Insurance Portability and Accountability Act of 1996 (HIPPA) (42U.S.C. §§1320d et seq.) and the implementing regulations, 45 CFR 160, which relate to health information privacy and security and the transmission of such information

12. Will comply with the following additional requirements in accordance with WIA:

- A. All proposals, evaluations, periodic program plans, and reports relating to each program will be available for public inspection.
- B. No grant funds will be used for the acquisition of real property or for construction unless specifically permitted by the authorizing statute or implementing regulations for the program.
- C. No grant funds will be used in violation of the prohibitions against use of such funds for religious worship, instruction, or proselytization.
- D. Contractor will cooperate in any evaluation of the program by the Secretary of the United States Department of Labor.
- E. Contractor will use fiscal control and accounting procedures that ensure proper disbursement of and accounting for federal funds.
- F. Contractor will obligate funds in accordance with the timing and other requirements of 29 CFR Part 97.21 or 29 CFR 95.22.
- G. Contractor will furnish reports that the Agency requests or that may reasonably be necessary for the Agency to carry out its responsibilities under the program, and will furnish all annual and other reports required by applicable laws and regulations.
- H. Contractor will keep records that fully show: (1) the amount of funds; (2) how the

## Attachment H

funds are used; (3) the total cost of the project; (4) the share of that cost provided from other sources; and (5) other records to facilitate an effective audit.

- I. Contractor will keep records to show its compliance with program requirements.
- J. Records will be retained for three years after completion of the projects and Work covered by this Contract and access will be provided as deemed necessary by the Department or the United States Department of Labor.
- K. Contractor will comply with the protection of the rights and privacy of parents and students in accordance with, the Family Educational Rights and Privacy Act of 1974, (20 U.S.C. §1232g).
- L. None of the funds will be used to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the purchasing entity or its employees or any affiliate of such an organization.

14. Will comply with all applicable requirements of all of the foregoing and all other federal, state and local laws, regulations, ordinances, executive orders, administrative rules and directives applicable to the grants, awards, programs and Work covered by this Contract

15. Debarment, suspension, ineligibility and voluntary exclusion – lower tier covered transactions: As required by Executive Order 12549, Debarment and Suspension, and implemented at 15 CFR Part 26, Section 26.510, Participants Responsibilities, for prospective participants in lower tier covered transactions (except subcontracts for goods or services under the \$25,000 small purchase threshold, unless the subtier recipient will have a critical influence on or substantive control over the award), as defined at 15 CFR Part 26, Sections 26.105 and 26.110:

- A. The prospective lower tier participant certifies, by submission of these assurances, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- B. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participants shall attach an explanation to this proposal.

16. The Contractor also agrees by signing this Contract that he or she shall require that the language of these assurances be included in all subagreements, which exceed \$100,000 and that all such subrecipients shall certify and disclose accordingly.

## Signature Page

### WIA Title I-B Statement of Concurrence for the Local Workforce Investment Area known as Region 15

#### *Statement of Concurrence*

We, the undersigned, do hereby approve and submit this Local Plan, including Attachments A, B, C and D for the Workforce Investment Act Title I-B Adult, Youth and Dislocated Worker Programs.

Workforce Investment Council will be the subrecipient under this Plan.

Workforce Investment Council will be the Administrative Entity under this Plan.

The length of this Plan will be January 1, 2013 through June 30, 2014.

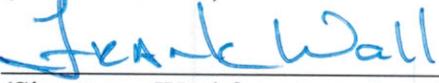
We assure that all activities entered into by the subrecipient and/or administrative entity with funds provided under this Plan will be subject to the attached assurances and confined to the described activities.

#### **Submitted on behalf of the Local Workforce Investment Board and Chief Elected Officials for this Local Workforce Investment Area:**

  
\_\_\_\_\_  
(Signature- Chief Elected Official)

NOV. 1, 2012  
(Date) C.I.

Charlotte Lehan, Chair  
(Name and Title)

  
\_\_\_\_\_  
(Signature- Workforce Investment Board Chair)

NOV. 1, 2012  
(Date)

Frank Wall Chair  
(Name and Title)

#### **Accepted on behalf of the State of Oregon:**

\_\_\_\_\_  
Cam Preus, Commissioner (Date)  
Department of Community Colleges and  
Workforce Development

\_\_\_\_\_  
Laurie Warner, Director (Date)  
Employment Department

**Signature Page**

**PY 2012-2017 Local Strategic Plan  
For the Local Workforce Investment Area  
known as**

**Region 15 – Workforce Investment Council of Clackamas County**

**Partners' Statement of Agreement**

We the undersigned do hereby approve and submit this Local/Regional Strategic Plan representing the following programs:

**Clackamas Community College**

- WIA Title IB (Adult and Dislocated Worker)
- WIA Title II (Adult Literacy)

**Employment Department**

- WIA Title III (Wagner Peyser Act)
- Programs authorized under State Unemployment Compensation Laws
- Trade Adjustment Assistance
- Title II, Chapter 2, NAFTA Transitional Assistance (Trade Act)
- Local Veterans Employment Representatives and Disabled Veterans' Outreach Programs

**Clackamas Education Service District**

- Carl Perkins Act
- WIA, Title IB (Youth)

**Department of Human Services: Children, Adults and Families**

- TANF
- Food Stamps, Medicaid and state funded programs including the Oregon Health Plan

**Department of Human Services**

- WIA Title IV
- Title I (Rehabilitation Act)

**Job Corps**

- WIA Title IC

**Easter Seals**

- The Older Americans Act

**Clackamas County Department of Health, Housing and Human Services**

- Community Action Programs
- Community Corrections
- Community Solutions

The length of this Plan will be **July 1, 2012** through **June 30, 2017**,

We agree with the contents of this Plan.

Submitted on behalf of the partners for this Workforce Investment Area.

Kim Parker 10-26-12  
(Signature) (Date)  
Kim Parker, Executive Director  
Workforce Investment Council

[Signature] 10-26-12  
(Signature) (Date)  
Kim Freeman, Area Manager  
Oregon Employment Department

Joanne Truesdell 10-25-12  
(Signature) (Date)  
Joanne Truesdell, President  
Clackamas Community College

[Signature] 10/23/12  
(Signature) (Date)  
Patrick Foster, Branch Manager  
Office of Vocational Rehabilitation Services

Fred Keene 10/11/12  
(Signature) (Date)  
Fred Keene, Outreach & Admissions Mngr.  
Job Corps (DESI)

[Signature] 10-23-12  
(Signature) (Date)  
Jerry Buzzard, District Manager  
Oregon Department of Human Services

David Cheveallier 10-2-12  
(Signature) (Date)  
David Cheveallier, CEO  
Easter Seals

[Signature] 10/3/12  
(Signature) (Date)  
Milt Dennison, Superintendent  
Clackamas ESD  
C-TEC (Employment Made Possible)

Maureen Thompson 10/8/2012  
(Signature) (Date)  
Maureen Thompson, Director  
Community Solutions for Clackamas County

[Signature] Oct 24, 2012  
(Signature) (Date)  
Brenda Durbin, Director  
Community Block Grant

Blibov 10-25-12  
(Signature) (Date)  
Victoria Libov, Community Project Manager  
IRCO

Bryan Baker 10/9/12  
(Signature) (Date)  
Bryan Baker, Managing Partner  
Express Services, Inc.

Trell Anderson 10/23/12  
(Signature) (Date)  
Trell Anderson, Executive Director  
Housing Authority of Clackamas County

Chris Hoy 10/03/12  
(Signature) (Date)  
Chris Hoy, Captain of Probation/Parole  
Clackamas County Community Corrections

Accepted on behalf of the State of Oregon

\_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Name and Title)

**LOCAL WORKFORCE INVESTMENT BOARD  
RECERTIFICATION REQUEST**

We certify that we are authorized to request recertification of the Workforce Investment Council for the Region 15. This recertification is for the Workforce Investment Act two-year period beginning July 1, 2012 and ending June 30, 2014.

This request includes documentation demonstrating the Local Workforce Investment Board Membership composition.

Submitted on behalf of the Local Elected Official(s) for this Local Workforce Investment Area.



\_\_\_\_\_  
(Signature – Local Elected Official)

Nov. 1<sup>st</sup> 2012  
(Date) C.I.

Charlotte Lehan, Chair  
(Printed Name and Title)

\_\_\_\_\_  
(Signature – Local Elected Official)

\_\_\_\_\_  
(Date)

\_\_\_\_\_  
(Printed Name and Title)

## OUTCOMES MEASURES TABLE

**Directions:** For each measure, please provide performance targets only for the programs that are not highlighted. Submit these with your strategic plan. At this time, do not provide targets for either the yellow or green highlighted programs. You will be asked to provide targets for the items highlighted in yellow by March 2013. (Data for these will be provided by January 2013.) Directions for completing performance targets for the items highlighted in green will be forthcoming.

Measure	Program	PY2013 Target	PY2014 Target	PY2015 Target
<p><b>1. Placement:</b> percent of customers employed the quarter when the individual completed services from the workforce system or the quarter after. (Source: PRISM)</p> <p><input type="checkbox"/> Submit targets with strategic plan</p> <p><input style="background-color: yellow;" type="checkbox"/> Set targets when data becomes available</p> <p><input style="background-color: #90EE90;" type="checkbox"/> Do not set targets until notified</p>	<b>WIA Title 1B (adult, youth and dislocated worker combined)</b>	71.6	72.7	73.8
	WIA Title II	35.4	36.0	36.5
	<b>WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)</b>	66.0	67.0	68.0
	<b>WIA Title IV - Vocational Rehabilitation</b>	50.2	51.0	51.7
	<b>Temporary Assistance for Needy Families (TANF)/JOBS</b>	41.3	41.9	42.5
	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title I/National Programs – Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Youth Conservation Corps			
	Commission for the Blind			
	Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)			
Food Stamp Employment Program (SNAP)				
<p><b>2. Retention:</b> Percent of customers employed in four continuous quarters after completing services. (Source: PRISM)</p> <p><input type="checkbox"/> Submit targets with strategic plan</p> <p><input style="background-color: yellow;" type="checkbox"/> Set targets when data becomes available</p> <p><input style="background-color: #90EE90;" type="checkbox"/> Do not set targets until notified</p>	<b>Program</b>	<b>Target for 2013</b>	<b>Target for 2014</b>	<b>Target for 2015</b>
	<b>WIA Title 1B (adult, youth and dislocated worker combined)</b>	61.0	61.9	62.8
	WIA Title II	66.3	67.3	68.3
	<b>WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)</b>	61.4	62.3	63.2
	<b>WIA Title IV - Vocational Rehabilitation</b>	64.9	65.9	66.9
	<b>Temporary Assistance for Needy Families (TANF)/JOBS</b>	36.5	37.0	37.6
	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title I/National Programs - Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Youth Conservation Corps			
	Commission for the Blind			
Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)				
Food Stamp Employment Program (SNAP)				

## OUTCOMES MEASURES TABLE

Measure	Program	Target for 2013	Target for 2014	Target for 2015
<b>3. Wage gain:</b> Fifth quarter average hourly wages minus first quarter average hourly wages. (Source: PRISM)  <input type="checkbox"/> Submit targets with strategic plan  <input checked="" type="checkbox"/> Set targets when data becomes available  <input checked="" type="checkbox"/> Do not set targets until notified	<b>WIA Title 1B (adult, youth and dislocated worker combined)</b>	.56	.56	.56
	<b>WIA Title II</b>	.59	.59	.59
	<b>WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)</b>	.69	.69	.69
	<b>WIA Title IV - Vocational Rehabilitation</b>	1.16	1.16	1.16
	<b>Temporary Assistance for Needy Families (TANF)/JOBS</b>	2.39	2.39	2.39
	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title I/National Programs - Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Youth Conservation Corps			
	Commission for the Blind			
	Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)			
Food Stamp Employment Program (SNAP)				

**Directions: Measure 4 is in development for January 2013. Do not set goals for this measure. This measure is included only for your information and future planning purposes.**

Measure	Program	Target for 2013	Target for 2014	Target for 2015
<b>4. Long term wage gain:</b> 13 <sup>th</sup> quarter average hourly wages minus first quarter average hourly wages. (Source: PRISM)  <input type="checkbox"/> Submit targets with strategic plan  <input checked="" type="checkbox"/> Set targets when data becomes available  <input checked="" type="checkbox"/> Do not set targets until notified	<b>WIA Title 1B (adult, youth and dislocated worker combined)</b>			
	<b>WIA Title II</b>			
	<b>WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)</b>			
	<b>WIA Title IV - Vocational Rehabilitation</b>			
	<b>Temporary Assistance for Needy Families (TANF)/JOBS</b>			
	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title I/National Programs - Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Youth Conservation Corps			
	Commission for the Blind			
	Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)			
Food Stamp Employment Program (SNAP)				

## OUTCOMES MEASURES TABLE

**Directions:** Measures 5 & 6 are in development for January 2013. Do not set goals for these measures. These measures are included only for your information and future planning purposes.

Measure	Program	Target for 2013	Target for 2014	Target for 2015
<b>5. Business Customer satisfaction.</b> Percent of employers who report satisfaction with new employees who completed workforce system programs.	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title II			
	WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)			
	WIA Title IV - Vocational Rehabilitation			
	Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)WIA			
	Title I/National Programs – Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Temporary Assistance for Needy Families (TANF)/JOBS			
	Youth Conservation Corps			
	Commission for the Blind			
	Food Stamp Employment Program (SNAP)			
<b>6. Job Seeker customer satisfaction.</b>	<b>Program</b>	<b>Target for 2013</b>	<b>Target for 2014</b>	<b>Target for 2015</b>
	WIA Title I-B Youth			
	WIA Title I-B Adult			
	WIA Title I-B Dislocated Workers			
	WIA Title II			
	WIA Title III Wagner-Peyser Employment Service (includes SEDAF funded services)			
	WIA Title IV - Vocational Rehabilitation			
	Older Americans Act/Title V – Senior Community Service Employment Program (SCSEP)WIA			
	Title I/National Programs – Veterans			
	WIA Title I/Migrant Seasonal Farm Workers			
	Trade Adjustment Assistance (TAA) & Trade Readjustment Allowances			
	Youth Conservation Corps			
	Commission for the Blind			
	Food Stamp Employment Program (SNAP)			

## OUTCOMES MEASURES TABLE

**Directions:** The following measures are to be developed over the course of the next year. Do not set goals for these measures. These measures are included only for your information and future planning purposes.

Measure	Program	Target for 2013	Target for 2014	Target for 2015
<b>Skills Gain:</b> skill credential based on administrative records.				
<b>Net Impact:</b> cost of services compared to numbers placed, earnings, taxes generated.				
<b>System Improvement Measure</b>				