



Northern Willamette Valley Transformation  
Implementation Plan  
June 3, 2008

## 1. Executive Summary

Project partners will transform the regional economy through several strategies that are responsive to the economic landscape and advanced manufacturing employers. At the core of the initiative is the principle that talent development and management is the foundation for economic growth. Strategies are grouped around four main goals: (1) Supporting leadership for regional economic growth; (2) Growing the talent pipeline; (3) Aligning curriculum; and (4) Increasing training opportunities. Some of these strategies focus on advanced manufacturing as pilots that can be expanded to meet a wider range of industry needs in the future. The transformational foundation of the partnership is a commitment to regional economic growth rather than the interests of political/administrative subdivisions.

**(1) Supporting leadership for regional economic growth.** Leadership for regional economic growth and transformation will be provided by the Regional Workforce Council composed of workforce, economic development, education, and business representatives. It will oversee project implementation, advocate for public and private support for regional talent development, help align workforce resources across the region, and serve as a forum for transformational approaches to talent development. Regional analysis will inform the Council's discussions on policy and program development, funding priorities and allocations, and strategic planning. Four related analyses are proposed: value stream mapping; resource mapping; workforce audit; and global context assessment. Each deepens our understanding of the region and together they will enable us to identify key points for alignment and investment.

**(2) Growing the talent pipeline.** Partners will grow the pipeline of highly skilled workers through four strategies aimed primarily at the emerging workforce: managing career-related learning experiences (CRLEs); High Tech U; development of a regional work readiness assessment and certification process; and enhancement of WorkSource Oregon's response to advanced manufacturing.

**(3) Aligning curriculum to reduce skills gap.** Partners will align curriculum for targeted sectors through three strategies: using WorkKeys in a reverse engineering process to develop highly responsive and highly relevant curriculum; building the career pathways roadmap; and re-careering for mature adults.

**(4) Increasing training opportunities.** Regional workforce partners understand that without a strong commitment to post-secondary training and education, we will not be able to meet advanced manufacturing's demand for talent. Partnering workforce boards will administer funds supporting ITAs, OJT opportunities, and customized training targeting advanced manufacturing. The Regional Workforce Council will help determine priority training and education needs and recommend specific training allocations.

The proposed regional partnership includes: four workforce boards (Worksystems, Inc., Workforce Investment Council of Clackamas County, The Enterprise for Employment and

Education, Management & Training Corp.); four key business associations (Manufacturing 21 Coalition, Semiconductor Workforce Consortium, Oregon Bioscience Association, Northwest High Performance Enterprise Consortium) and the SEMI Foundation; three regional economic development entities (Regional Economic Development Partners, Portland Development Commission, Strategic Economic Development Corp); four community colleges (Portland CC, Mt. Hood CC, Clackamas CC, and Chemeketa CC); Portland State University; and key state entities (the Governor's Office, Oregon Workforce Investment Board, Oregon Department of Community Colleges and Workforce Development, Oregon Employment Department, Oregon Economic and Community Development Department), and the Governor's Manufacturing Workforce Strategy Steering Committee.

College, economic development and WIB partners played key roles in developing the original proposal and this implementation plan. The colleges are essential to the completion of the job profiling and curriculum development work at the core of our effort to align curriculum to reduce the skills gap. Economic developers helped us frame our regional identity and the regional economic landscape during initial planning. They will help guide our approaches to enhancing the responsiveness of WorkSource centers to advanced manufacturing and help us target our training investments. They will play a core role in helping us identify our competitive advantages as part of the global context assessment and the development of a regional investment plan. The WIB partners assisted in the development of most of the initial plans and implementation. They will play a key role in regionalizing the work of the skill panels.

## **Modification Request**

**With this Plan, we are requesting DOL approval to include three contiguous counties in Southwest Washington in our WIRED region. The three counties, located just across the Columbia River from the Oregon counties, are Clark (including the City of Vancouver), Cowlitz, and Wahkiakum. These three counties are served by the Southwest Washington Workforce Development Council, which looks forward to participating in the WIRED partnership. Letter from Washington Workforce Training and Education Coordinating Board is attached.**

In the region's shared labor shed, more than 60,000 workers commute across the Columbia River from Clark, Cowlitz, and Wahkiakum counties in Washington to Multnomah, Washington, and Clackamas counties in Oregon. Another 10,000 workers commute in the opposite direction. The bi-state regional economy, and the sharing of a labor shed in particular, are facilitated by a transportation infrastructure that includes an interstate highway (I-5) that links the region from Cowlitz County in the north to Marion County in the south, as well as connecting the region to Seattle and Los Angeles. Another north-south interstate (I-205) links the fast growing areas of Clackamas and Clark counties. Four bridges in the region span the Columbia River between Washington and Oregon, facilitating the flow of goods, workers, casual travel, and culture.

Several industries with a strong presence in both states draw from the labor shed regardless of political boundaries. The Silicon Forest in Washington County is the economic center (Location Quotient 10.57) of the region's computer and electronic product manufacturing, including semiconductors, but a high location quotient also exist in Clark County (LQ=2.49). The pulp and paper products industry is a major employer in Cowlitz (LQ=8.05) and Columbia (LQ=10.71) counties and continues to develop advanced manufacturing technologies.

Along with the participation of the Southwest Washington Workforce Development Council, inclusion of our partners in Washington will engage the Columbia River Economic Development Council, Clark College, Lower Columbia College, and several industry leaders in advanced manufacturing.

## **2. WIRED Goals**

*Our vision for transforming the regional economy relies on a truly regional approach to talent development in which education, economic development, workforce development and business collaborate to create consistently high performing systems for school – business connections, labor exchange, and training. We will develop these systems based on the fact that industry recruits talent from a labor shed that stretches from Longview in Washington to Salem in Oregon. Systems must be coherent and easily navigable for businesses and job seekers, without regard for political boundaries. Although the region is fortunate in that it ranks among the leaders in attracting talent from around the nation, sustained economic growth depends on companies being able to find the talent they need without depending on in-migration. This initiative focuses on developing and managing the region’s talent to meet the needs of current employers, support business expansion, and attract new investment in the Northern Willamette Valley by companies attracted to a highly skilled labor force.*

Goal 1: Supporting leadership for regional economic growth.

The WIRED region includes four WIBs (five if Southwest Washington is included), four community colleges (six if Southwest Washington is included), numerous political entities, and differing approaches to workforce and economic development. In order to implement a regional approach to workforce and economic development, we have established a Regional Workforce Council composed of industry, workforce, economic development, and education leaders. The Council will be asked to bring a regional perspective to the alignment of grant and leveraged resources with the needs of growth industries. Although the effort is nominally focused on advanced manufacturing, strategies may impact other sectors or serve as pilots for wider replication. The Council will be empowered to define what regionalism will look like, to determine regional goals for workforce development and economic prosperity, to identify a desired future state, and to consider appropriate metrics to guide us on our journey. Ultimately, the Council will provide a strategic focus and framework for WIRED initiatives. Our intent is for Council members to look beyond the scope of the grant in carrying out their responsibilities. To support the Council, we will contract with consultants to lead a series of four analyses over the course of the grant: value stream mapping, resource mapping, workforce audit, and global context assessment. The sequence of analyses is designed to help transform the way we do business by shedding light on process and service delivery, resources and assets, workforce supply and demand, and our global economic and competitive context. The analyses will inform the development of a regional investment plan at the conclusion of the grant. We will also collaborate with the Oregon Employment Department/Labor Market Information System to purchase a subscription to an online economic modeling service to inform our planning.

## Goal 2: Growing the talent pipeline.

Four strategies will be implemented to strengthen the pipeline of highly skilled workers: managing career-related learning experiences (CRLEs); High Tech U; development of a regional work readiness assessment and certification process; and enhancement of WorkSource Oregon's response to advanced manufacturing.

We will transform the way that youth engage in career related learning experiences through a consistent regional model. Currently, there is no systematic approach across the region and employers are burdened by requests from a totally decentralized system. We will pilot centralized models at several sites that combine a data system for managing CRLEs with the Oregon Career Information System that provides labor market information about occupations and career paths. This will increase student participation in these activities consistent with Oregon's new mandate for such participation as a graduation requirement. Further, CRLEs are seen as a valuable tool for building the school-business connections that are essential to engaging youth in industry. We will incorporate best practices from our experience working with local employers to provide career exposure opportunities to youth from local alternative schools and CBOs funded by the DOL High Growth Youth Offender Grant. This model provides youth with opportunities to learn about local high growth industries through work-based exposure activities such as company tours, project based learning, internships and classroom learning. In addition, we will engage K-12 leaders in planning and implementation, and conduct outreach to businesses as the pilots are implemented. By the conclusion of year 2, the Regional Workforce Council will evaluate the pilot sites and approve a regional model.

The SEMI Foundation (Semiconductor Equipment and Materials International) has developed "High Tech U," a 3-day immersion in microelectronics for high school students. In partnership with the Foundation, the SEMI Northwest Steering Committee, and industry and college partners, we will broaden the microelectronics pipeline by engaging rural students in the High Tech U program. This program will provide additional CRLE opportunities and serve as a model to help develop similar immersions for other industries with the goal of achieving a sustainable CRLE capacity to engage the emerging workforce and strong school - business connections. Preliminary discussions indicate strong interest among bioscience and solar energy companies in developing similar programs.

Because the region presents a common labor shed to employers, the regional workforce system must adopt common tools to market work-ready talent. WorkSource partners will pilot a consistent model for assessing and certifying work readiness built on assessment of mathematical, reading, information-gathering, and soft skills, and a curriculum that can be used to bring job seekers up to industry expectations in those areas. We intend to pursue implementation of this system as a web-based assessment/certification process to enhance its availability to WorkSource partners. The initiative will leverage the use of WIN (World Interactive Network) to assess applied math, reading for information and information-gathering via a CCWD pilot in the WIRED region. The pilot will also use WIN's on-line interactive curriculum to help clients progress to higher skill levels in each of the three content areas. The process will result in a portable, industry recognized Career Readiness Certificate. [At present, CCWD continues to negotiate with ACT to build the WorkKeys certification process into the pilot, but the eventual results of the negotiation are unclear.] WIRED partners will enhance the CCWD pilot with WIN's web based soft skills assessment and curriculum, including writing, listening, observation, work habits, and teamwork. This will increase the relevance of the

publicly funded workforce system in meeting industry's need for talent. We expect to see the impact demonstrated in higher retention rates.

In an effort to further enhance WorkSource responsiveness to industry, partnering workforce boards and the Employment Department will host industry forums and skill panels and develop teams of sectoral specialists through provision of extensive sector and marketing training to Account Representatives and Career Specialists in WorkSource centers and youth programs, and college staff. This strategy will lead to more relevant and responsive recruiting for targeted sectors, and inform the development/refinement of curricula and training programs.

### Goal 3: Aligning curriculum to reduce skills gap.

The goal of our curriculum alignment effort is to design curriculum that is relevant to industry, that is timely, and that contributes to high quality training. Regional competitiveness depends on the production of talent that is familiar with cutting edge manufacturing processes and technologies. We will design or enhance curriculum through a "reverse engineering" process using WorkKeys, which will allow us to identify a job's tasks and responsibilities as well as the foundation skills required to perform competently. The resulting task lists and job profiles will guide development and delivery of customized/OJT training programs for advanced manufacturing sectors and incorporation into academic programs and Career Pathways. This curriculum development effort will also support the ongoing development of the Career Pathways Roadmap, a dynamic tool hosted on a student/worker facing website maintained by the Department of Community Colleges and Workforce Development. The Roadmap for advanced manufacturing will visually depict the coursework, competencies, skill requirements, and credentials needed for a series of related occupations in an industry sector, as well as the career lattices that identify multiple entry and exits points and potential lateral and vertical movement within a career cluster. Community College partners will use the job tasks and profiles identified during reverse engineering to develop curriculum for advanced manufacturing occupations to help fill gaps in advanced manufacturing pathways identified by the Roadmap development process and the industry skill panels noted above. Partners will seek opportunities to link Pathways developments in Oregon and Washington. In response to an aging workforce and potential loss of skills due to retirements, college partners will enhance Career Pathways to create re-careering options for older workers. These strategies will help the region reduce its skills gap.

### Goal 4: Increasing opportunities for training.

A portion of WIRED grant funds will be used to create a training fund that will respond to the workforce needs of advanced manufacturing. Key to the WIRED effort is a regional approach to prioritizing and allocating training resources. One of the responsibilities of the Regional Workforce Council will be to use data produced by the regional analyses and industry forums and skill panels to make training investment recommendations. This will represent a dramatic and transformational departure from the customary process of controlling training funds and allocation decisions at the local WIB level. The WIRED training fund will serve as a pilot for future planning and resource allocation at a regional level.

## WIRED Goals Matrix

### Goal 1: Supporting leadership for regional economic growth

Key Strategies	Activities	Responsibility	Timeframes/ Milestones	Resources Needed	Outcomes/Metrics
Develop Regional Workforce Council to align funding of talent development based on regionalized research and planning	<ol style="list-style-type: none"> <li>1. Monthly initial meetings, followed by quarterly meetings.</li> <li>2. Use of subcommittees to plan implementation of program components.</li> <li>3. Make strategic recommendations based on the findings of regional analyses.</li> <li>4. Professional meeting facilitation and communications (WIRED technical assistance).</li> </ol>	WIB Directors convene. Project Manager staffs. Professional facilitation.	<p>First meeting 10/3/07.</p> <p>Approval of implementation plan 11/7/07.</p> <p>Committee structure in place 12/15/07.</p> <p>Council begins work on regionalism and desired future state 1/31/08</p>	WIB Directors and Council members will host meetings. Their time will be contributed to the Council.	<p>Outcome: Prioritization of needs and allocation of resources based on regionalized research,</p> <p>Metrics:  <ol style="list-style-type: none"> <li>1. Consistent participation on Council by regional workforce, education, economic development and business leaders.</li> <li>2. An investment plan that reflects the regional approach to talent development by yr 3.</li> </ol> </p>
Value stream mapping to reduce redundancy in publicly funded WorkSource system and increase efficiency	<ol style="list-style-type: none"> <li>1. Procure for consultant.</li> <li>2. Develop value stream maps.</li> <li>3. Develop regional approach to labor exchange functions</li> <li>4. Expand use of high performance tools in WorkSource.</li> <li>5. Develop metrics for continuous quality improvement.</li> <li>6. Consultant report to the Council.</li> </ol>	<p>Project Manager will manage consultant contract.</p> <p>WIB Directors and Employment Dept Regional Managers will facilitate consultant access.</p>	<p>Proposals due 10/19/07; contract by 11/30/07</p> <p>Interim report to Council 3/2008.</p> <p>Complete by 6/30/08</p>	<p>\$35,000 Grant \$65,000 REDP</p> <p>Additional \$50,000 REDP to include SW Washington in the 4 analyses.</p>	<p>Outcomes:  <ol style="list-style-type: none"> <li>1. Increased performance and consistency in labor exchange processes across the regional labor shed.</li> <li>2. Enhanced ability of job seekers to access jobs across the region; enhanced ability of employers to access workers across the region.</li> </ol> </p> <p>Metrics:  <ol style="list-style-type: none"> <li>1. Consultant report to the Council.</li> <li>2. Increase in the number of placements.</li> <li>3. Increase in the number of individuals served.</li> <li>4. Increase in the number jobs listed.</li> </ol> </p>

<p>Map funding sources for workforce development throughout the WIRED region.</p>	<ol style="list-style-type: none"> <li>1. Procure for consultant.</li> <li>2. Consultant report to the Council</li> </ol>	<p>Project Manager will manage consultant contract.</p> <p>WIB Directors and Employment Dept Regional Managers will facilitate consultant access.</p>	<p>Procurement begins 11/2007</p> <p>Interim report to Council 3/2008.</p> <p>Complete by 6/30/08</p>	<p>\$75,000 Grant</p>	<p>Outcomes</p> <ol style="list-style-type: none"> <li>1. Increased collaboration among funding sources in planning, funding and implementing talent development initiatives.</li> <li>2. Greater alignment of workforce funding with regional planning efforts.</li> </ol> <p>Metric: A “regional budget” that shows all of the region’s investments toward the support of a developing a workforce for high skill/high wage jobs.</p>
<p>Workforce audit to identify skill and training projections and gaps.</p>	<ol style="list-style-type: none"> <li>1. Procure for consultant.</li> <li>2. Consultant report to Council</li> </ol>	<p>Project Manager will manage consultant contract.</p> <p>WIB Directors, CCWD, college partners, and Employment Dept will facilitate consultant access to data.</p>	<p>Procurement begins 7/2008</p> <p>Interim report to Council 3/2009</p> <p>Complete by 6/30/09</p>	<p>\$75,000 Grant \$75,000 WSI</p>	<p>Outcome: Improved alignment of training capacity with workforce demands.</p> <p>Metric: Regional map of projected occupational and skill demands</p>
<p>Global context assessment to identify the region’s competitive advantages.</p>	<ol style="list-style-type: none"> <li>1. Procure for consultant.</li> <li>2. Consultant report to Council.</li> </ol>	<p>Project Manager will manage consultant contract.</p>	<p>Procurement begins 7/2009</p> <p>Interim report to Council 3/2010</p> <p>Complete by 6/30/10</p>	<p>\$40,000 Grant \$100,000 WSI</p>	<p>Outcome: Regional planning based on competitive advantages.</p> <p>Metrics:</p> <ol style="list-style-type: none"> <li>1. A regional strategic workforce and economic development plan based on the region’s competitive advantages.</li> <li>2. Development of benchmark against peer regions</li> <li>3. Improvement in benchmarks over time.</li> </ol>

Goal 2: Growing the talent pipeline

Key Strategies	Activities	Responsibility	Timeframes/ Milestones	Resources Needed	Outcomes/Metrics
<p>Increase regional capacity to expand quality career related learning experiences</p>	<ol style="list-style-type: none"> <li>1. Charter work group.</li> <li>2. Develop local pilots.</li> <li>3. Identify strengths and weaknesses of current pilots.</li> <li>4. Reach agreement on regional model.</li> <li>5. Purchase system licenses and programming (not equipment).</li> <li>6. Procure for subregional coordinators.</li> <li>7. Identify participating schools.</li> <li>8. Outreach/marketing to schools and businesses.</li> <li>9. Semi-annual reports to Council.</li> </ol>	<p>Designated WSI staff person will staff work group, coordinate subregional implementation sites, system licensing, etc., with local WIBs, K-12, and other partners.</p>	<p>Agreement on regional pilots 3/31/08.</p> <p>System licenses and programming by 5/31/08.</p> <p>Coordinators in place 7/1/08.</p> <p>Decision on regional approach by 6/30/09.</p>	<p>\$1,381,279 Grant</p> <p>\$467,479 from WSI and current pilots</p>	<p>Outcome: Enhanced school-business connections.</p> <p>Metrics:</p> <ol style="list-style-type: none"> <li>1. 150 employers engaged with schools through this system.</li> <li>2. Regional system to engage youth in CRLEs is defined/ documented.</li> <li>3. 1,500 students participate in CRLEs.</li> <li>4. Surveys of schools and businesses indicate satisfaction with regional model.</li> </ol>
<p>High Tech U to help rural HS students explore high tech careers</p>	<ol style="list-style-type: none"> <li>1. Agreement with SEMI Foundation.</li> <li>2. Identify targeted rural schools.</li> <li>3. Recruit industry sponsors.</li> <li>4. Review/refine curriculum.</li> <li>5. Recruit HS students and orient students and parents.</li> <li>6. Conduct High Tech U.</li> <li>7. Reports to Council.</li> </ol>	<p>Designated WSI staff person will coordinate planning and recruiting efforts with SEMI Foundation and its local agents for High Tech U programs.</p>	<p>High Tech U programs will be held in years 2 and 3.</p> <p>Planning for the year 2 program will begin 10/12/07.</p>	<p>\$30,000 Grant \$46,000 from industry partners.</p>	<p>Outcomes:</p> <ol style="list-style-type: none"> <li>1. Rural HS youth engaged in science/technology careers.</li> <li>2. Expansion of model to other industries.</li> </ol> <p>Metrics</p> <ol style="list-style-type: none"> <li>1. 60 HS youth from the rural portions of the WIRED region complete the HTU program and gain exposure to science, technology, and engineering careers.</li> <li>2. 50 HS youth will show increased interest in science, technology, and engineering careers as measured by participant surveys.</li> <li>3. Development of immersion programs for bioscience and solar energy industries.</li> </ol>



<p>Regional assessment and certification of work readiness implemented</p>	<ol style="list-style-type: none"> <li>1. Charter work group.</li> <li>2. Develop implementation plan with OED, CCWD, and other stakeholders.</li> <li>3. Modify i-Match.</li> <li>4. Procure for WIN's web-based soft skills assessment and curriculum.</li> <li>5. Training for WorkSource staff.</li> <li>6. Implementation.</li> </ol>	<p>WIB Directors, One-Stops, college partners, and Employment Dept. coordinate implementation.</p>	<p>Procurement for assessments 2/30/08.</p> <p>i-Match adaptation for web-based access 4/30/08.</p> <p>Begin on-line implementation 5/30/08.</p> <p>WIN components implemented by 6/30/08.</p>	<p>\$523,389 Grant.</p>	<p>Outcome: Implementation of assessment/certification system that meets the needs of employers and job seekers.</p> <p>Metrics</p> <ol style="list-style-type: none"> <li>1. Regional system for assessing and certifying work-readiness in place by 6/2008.</li> <li>2. Increased employer satisfaction with referred candidates as measured by employer surveys by 6/2010</li> <li>3. Increased job retentions rates as measured by 6/2010.</li> </ol>
<p>Enhance WorkSource Responsiveness to Advanced Manufacturing</p>	<ol style="list-style-type: none"> <li>1. Charter work group.</li> <li>2. Convene sector forums and skill panels.</li> <li>3. Procure for trainers.</li> <li>4. Provide training for WorkSource staff on advanced manufacturing workforce requirements and projections, assessment and training resources, and marketing and delivery of business services.</li> <li>5. Hold customized recruitments.</li> </ol>	<p>WIB Directors, One-Stops, Employment Dept. and colleges coordinate implementation.</p>	<p>Sector forums/ skill panels begin 10/2007.</p> <p>Training for WorkSource Oregon begins 1/2008.</p>	<p>\$209,782 Grant</p> <p>Business participation in forums and skill panels.</p>	<p>Outcome: Stronger connection between business and the publicly funded workforce system.</p> <p>Metrics:</p> <ol style="list-style-type: none"> <li>1. 4 Sector forums and associated skill panels in advanced manufacturing.</li> <li>2. 20 customized recruitments.</li> <li>3. Training for 100 WorkSource staff through region.</li> <li>4. Increased employer satisfaction with WorkSource responsiveness as measured by employer surveys by 6/2010.</li> <li>5. Increased market share for publicly funded workforce system as measured by 6/2010.</li> </ol>

Goal 3: Aligning curriculum to reduce skills gap

Key Strategies	Activities	Responsibility	Timeframes/ Milestones	Resources Needed	Outcomes/Metrics
Use of WorkKeys to complete job profiles and identify tasks, skill sets, proficiencies to enhance curriculum and training program development related to advanced manufacturing	<ol style="list-style-type: none"> <li>1. Charter work group.</li> <li>2. Contract with Portland Community College as the hub for four college effort.</li> <li>3. PCC hires project manager to manage colleges' work.</li> <li>4. Agree with industry partners on targeted occupations.</li> <li>5. Development of curriculum and customized training programs.</li> </ol>	College partners coordinated by PCC project manager in collaboration with WIRED Project Manager.	<p>Contract with PCC 10/2007</p> <p>Hire PCC project manager 1/2008</p> <p>Job profiling begins 2/2008.</p>	<p>\$1,246,231 Grant</p> <p>\$1,679,741 in college support.</p>	<p>Outcome: Development of curriculum and training responsive to advanced manufacturing.</p> <p>Metrics</p> <ol style="list-style-type: none"> <li>1. 34 job profiles in advanced manufacturing by 6/2010.</li> <li>2. 5 VESL trainings developed by 6/2010.</li> <li>3. 8 new customized training programs by 6/2010.</li> <li>4. 3 to 5 new certificate or degree programs by 6/2010.</li> </ol>
Career Pathways roadmap to identify and Fill gaps in Pathways with new curricula	<ol style="list-style-type: none"> <li>1. Create web-based roadmap: visual depiction of career ladders/lattices, training requirements, training resources</li> <li>2. Seek opportunities to link Pathways developments in Oregon and Washington.</li> </ol>	CCWD and college partners are developing the web-based roadmap for manufacturing.	Career Pathways Roadmap for manufacturing online by 6/30/09.	<p>CCWD resources are dedicated to the roadmap.</p> <p>Curriculum and training funded by WIRED provide additional content for the roadmap.</p>	<p>Outcome: Completion of visual, online depiction of education and training requirements for related occupations, along with career lattices linked to updated labor market information.</p> <p>Metrics:</p> <ol style="list-style-type: none"> <li>1. Roadmap adopted by WorkSource offices and 20 high schools as a valuable career guidance tool by 6/30/2010.</li> <li>2. 10% increase in Career Pathways trainees by 6/30/10.</li> </ol>
Re-careering for mature workers to increase the advanced manufacturing workforce	<ol style="list-style-type: none"> <li>1. Develop strategies for attracting and retaining older workers.</li> <li>2. Incorporate strategies into Career Pathways.</li> </ol>	College partners coordinated by PCC project manager.	Ongoing effort begins 7/2008.	Necessary resources are included in the budget for curriculum and training program development.	<p>Outcome: Re-engagement of mature workers in manufacturing.</p> <p>Metrics: 10% increase in percentage of Career Pathways trainees aged 50 or older by 6/30/10.</p>

Goal 4: Increasing opportunities for training

Key Strategies	Activities	Responsibility	Timeframes/ Milestones	Resources Needed	Outcomes/Metrics
<p>Establish regional training priorities supported by public and private funds.</p>	<ol style="list-style-type: none"> <li>1. Council reviews findings of regional analyses and industry forums.</li> <li>2. Council charters work group to draft training fund allocation recommendations.</li> </ol>	<p>Council makes allocation recommendations for WIRED grant training fund and for other training funds.</p>	<p>Council committee chartered 5/08.</p> <p>Resource mapping data available 6/2008</p> <p>First committee draft and Council action 7/2008.</p> <p>Workforce audit data available 6/2009.</p> <p>Second committee draft and Council action 7/2009.</p>	<p>Commitment of Council to review data and make decisions/recommendations driven by regional economic growth.</p>	<p>Outcome: Training fund allocations responsive to industry need and consideration of regional economic growth.</p>
<p>Provide customized training, ITAs, and OJTs</p>	<ol style="list-style-type: none"> <li>1. Define scope of training and mix of training vehicles (customized training, ITAs, and OJTs) at industry forums, skill panels, or other meetings.</li> <li>2. Develop data collection protocols using systems already available: WIASRD.</li> <li>3. WSI contracts with partner WIBs to fund training and reporting.</li> </ol>	<p>Local WIBs, colleges, other training providers, and industry partners.</p>	<p>Local WIBs receive WIRED training funds 8/2008 and 8/2009.</p> <p>WIRED-funded training begins 9/2008.</p>	<p>\$858,000 Grant</p>	<p>Metrics</p> <ol style="list-style-type: none"> <li>1. Provide training targeting advanced manufacturing skills for 250-300 trainees using WIRED funds.</li> <li>2. Maintain successful training completion rate of 85%.</li> <li>3. Maintain training-related entered employment rate (for non-incumbents) of 75%.</li> <li>4. Maintain average starting wage over \$10/hour for 90% of new hires.</li> <li>5. Maintain retention rate of 90% for trainees using WIA definition.</li> <li>6. Maintain “jobs with benefits” rate of 90% for trainees.</li> <li>7. TBD: Wage gain measure using WIA definition..</li> </ol>

### 3. Governance

On behalf of the Governor, the Department of Community Colleges and Workforce Development (CCWD) is the grant recipient. Worksystems, Inc. (WSI) has been designated as the grant administrator and fiscal agent. Andrew McGough, Executive Director, is the WIRED Project Director and will share overall grant responsibility with Camille Preus, Commissioner of CCWD and Co-Project Director. WSI will assume such administrative functions as contracting with partners and consultants in accordance with the approved proposal and implementation plan. WSI Senior Project Manager, Cary Harkaway, will serve as WIRED Project Manager and provide day-to-day coordination of implementation and required reporting in collaboration with CCWD staff.

The Regional Workforce Council was planned during proposal development to serve as the steering committee for the WIRED project and its program initiatives. More importantly, it will serve as the catalyst for regional economic transformation. It is the only organization whose membership represents the leadership of the publicly funded workforce system, state and local economic development, education, and industry in the ten-county region from Salem, Oregon to Longview, Washington. The membership list is attached to this document. Most of the members were involved in developing the initial proposal. The Council is staffed by the WIRED Project Manager. The Council met for the first time on 10/3/07. Consistent with our goal for a business-led Council, Keith McPhun, Director of Manufacturing at nLight Photonics, assumed the role of Chair on 1/31/08.

Although each Council member represents a constituency, the Council is committed to a regional approach based on the following: *Members will neither ignore their local interests, nor be rigidly bound to promote those interests. Rather, they will share promising practices, learn from and with each other, and build on the region's competitive advantages to pursue transformational change in the development and management of talent as a foundation for regional economic growth.*

**Quorum:** A majority of the membership at the time of the commencement of a meeting will constitute a quorum.

**Manner of Acting:** Each member shall have one vote. The act of a majority of the members present or participating electronically at a meeting at which a quorum is present shall be the act of the Council. Notwithstanding the ability of the Council to reach decisions in this manner, members will strive for consensus decisions, defined as decisions that all members present can support.

**Controls:** Program controls will be instituted by the WIRED Project Manager to assure that all WIRED operations are carried out in compliance with the approved implementation plan and that variances are brought to the attention of the Council, its committees or designated staff, or DOL grant monitors, as appropriate, for correction and/or plan modification. Implementation and performance data will be collected and shared quarterly with the Council and DOL. Fiscal controls will be applied by CCWD and by WSI and its Fiscal Unit as fiscal agent for the grant. The Fiscal Unit will submit invoices and supporting documentation to CCWD on a cost reimbursement basis. The Fiscal Unit will assure that all contracting is done in accordance with WSI's procurement policy and that contractor payment requests include proper supporting documentation. The Fiscal Unit will go over each invoice with the WIRED Project Manager to verify that the work was done in accordance with the relevant contract and the implementation plan. CCWD will submit invoices electronically to DOL and grant funds electronically to WSI.

CCWD will review all fiscal and program reports and audit WSI program and fiscal operations on an annual basis for compliance with WSI, CCWD, and DOL policies and regulations. An organization chart is attached.

#### **4. Operations**

The Council will meet monthly for the first four months and quarterly after that if implementation appears to be on track. As appropriate, the Council will charter work groups to oversee or assist in the implementation of specific WIRED program components. The Implementation Plan Committee, formed at the 10/3/07 Council meeting, assisted in the preparation of this document.

Several initial implementation steps, considered essential to the Northern Willamette Valley Transformation, were proceeding while the first meeting of the Council and receipt of DOL's instructions for the implementation plan were pending. These activities were included in the initial proposal, discussed at the 10/3/07 Council meeting, and formally approved by the Council as part of the implementation plan on 11/7/07. These activities included the planning and coordination work of the WIRED Project Manager, procurement for consultants to lead value stream mapping and resource mapping projects, negotiation of a contract with Portland Community College to lead the work of the college partners, development of the position description and the recruitment for the project manager (who was hired by Portland Community College in January 2008) to coordinate the work of the college partners, and initiation of industry forums/skill panels.

At its 11/7/07 meeting, the Council chartered the following work groups consistent with the strategies and activities summarized in the WIRED Goals Matrix: (1) Curriculum Alignment; (2) School – Industry Connections; (3) Work Readiness Assessment and Certification; (4) WorkSource – Industry Connections; and (5) Regional Analysis. Typical of the cross-functional and region-wide approach of these work groups is the regional analysis work group. This committee was constituted to advocate for effective use of data and analysis in support of regional workforce development and to guide implementation of WIRED regional analysis projects and development of deliverables. This committee includes economists, economic developers, workforce developers, data analysts, business leaders, and representatives of higher education, assuring that all relevant perspectives are addressed in the analyses. The Council anticipates chartering a Training Priorities Work Group in 5/2008. These work groups will report on their progress at Council meetings. In addition to these work groups, the WIRED WIB directors have begun meeting monthly to help with project implementation, resource coordination, and post-grant regionalization.

The Project Manager will prepare and distribute WIRED Updates that keep Council members and other stakeholders well informed concerning WIRED activities. Updates will be posted on the WIRED website, [www.wirednw.org](http://www.wirednw.org) and will be shared with The Voice of Oregon Manufacturing at [www.oregonmanufacturing.org](http://www.oregonmanufacturing.org). The Project Manager will also provide WIRED briefings at stakeholder meetings, as requested.

A key element of our strategy is to maximize the flexibility we have in spending WIA funds to respond to the needs of business in a dynamic economy. Toward that end, WIRED partners had several meetings with CCWD staff and the Oregon WIB and agreed on submission of a request to DOL for several waivers. A copy of the request is attached. We look forward to a timely review by DOL.

WSI is planning to purchase a subscription to an online economic modeling tool to help the region identify, consider, and report key economic indicators and labor market information. WSI will pursue this purchase in collaboration with the Oregon Employment Department/Oregon Labor Market Information System to assure the most favorable terms.

### Business Partners

The role of business partners assures that our WIRED initiative is relevant to the industries driving economic growth and supporting careers with living wages and potential for advancement.

Regional high tech companies will support the High Tech U program, contributing cash, serving as program sites, and providing the instructors. Working with the SEMI Foundation, participating businesses help focus the curriculum so that 16 to 18 year old high school students are able to relate key manufacturing and engineering principles to technical careers and the required education and training.

The business-led skills panels, now underway, are a vehicle for identifying gaps in curriculum and for prioritizing the training needs in advanced manufacturing. Curriculum gaps exist when curriculum doesn't meet industry standards for availability, relevance (up to date on the latest technologies), and quality. The panels consider training needs throughout the workforce pipeline, for the emerging workforce, new and incumbent workers. Business and college partners will collaborate in profiling specific occupations, identified, in part, by the skill panels, as a basis for developing highly responsive curricula. The work of the skill panels will help assure that curriculum development efforts are responsive to business demand. The panels, along with other business partners, will also provide input on the work readiness assessment and certification model that will be developed. Specifically, the tools will focus on the foundation skills and qualifications that our business partners tell us are essential for entry level workers.

### Target Industry

Our WIRED initiative focuses curriculum development and training resources on advanced manufacturing because of manufacturing's significance to Oregon's economy. In November 2007, manufacturing employment represented 14% of total nonfarm private sector employment, down only slightly from the 14.5% annual share in 2005 and 2006. Additionally, although manufacturing employment is projected to show a slight decline nationally from 2006 to 2016, it is projected to show a slight increase in Oregon. Perhaps more significant than employment growth is the number of projected openings: 40,733, including 32,930 replacement openings due in large part to retirements. We view our WIRED work with manufacturing as establishing and testing models for future work with other sectors. Should the advanced manufacturing sectors decline significantly during the grant period, we will be prepared to re-focus curriculum and training resources on sectors demonstrating employment growth. Leveraged resources are being used to staff skill panels in healthcare, software, and construction and to fund the training priorities that those industry-led panels identify. We also know that lessons learned in enhancing the response of the WorkSource system to advanced manufacturing will apply to other economic sectors.

### Sustainability

WIRED partners have expressed their commitment to a regional approach to talent development beyond the grant period. To that end, the Regional Workforce Council has

discussed the value of continuing as a planning body and assisting with the implementation of the regional investment plan.

The WIRED WIB Directors now meet monthly to discuss regional workforce development issues and the implementation of WIRED initiatives. They have agreed to continue as a permanent organization in recognition of their common interests and have formulated a set of governing principles.

The Regional Analysis Work Group has begun discussing the possibility of using the Metropolitan Knowledge Network as a sustainable resource for workforce policy analysis. The Metropolitan Knowledge Network is an on-line tool being developed by the Portland State University Institute of Portland Metropolitan Studies as a source for up to date information and timely policy analysis. Committee member Sheila Martin is the director of the Institute.

The skill panels will be discussing strategies for sustaining training. For example, as an agreement of the bioscience skill panel, the Oregon Bioscience Association and its members have adopted a training model in which participating companies contribute cash match to leverage future training resources.

## Budget Allocations for Year 1

	<b>Grant Yr 1</b>	<b>Grant Total</b>
<b>REGIONAL WORKFORCE COUNCIL</b> Develop Regional Workforce Council to align funding of talent development based on regionalized research and planning	<b>0</b>	<b>0</b>
<b>REGIONAL ANALYSIS</b>		
Supplies	250	250
Value stream mapping: Consultant to apply VSM as a high performance tool to reduce redundancy and increase efficiency in publicly funded WorkSource system and increase efficiency	35,000	35,000
Resource mapping: Consultant to map funding sources for workforce development throughout the WIRED region.	75,000	75,000
Workforce Audit: Consultant to identify skill and training projections and gaps.		75,000
Regional competitiveness assessment: Consultant to identify the region's competitive advantages.		40,000
<b>TOTAL</b>	<b>110,250</b>	<b>225,250</b>
<b>GROWING THE PIPELINE</b>		
Managing Career-Related Learning Activities: Increase regional capacity to expand quality career related learning experiences (contracted).		
Data system management, .9 FTE for 6 months	20,250	
Management for 6 months, .3 FTE for 6 months	11,250	
Fringe at 31%	9,765	
Data system license	27,000	
Supplies	1,250	
Indirects at 10%	6,952	
SUBTOTAL	76,467	1,381,279
Work Readiness Certification: Regional assessment and certification of work readiness implemented		
Purchase of web-based soft skills/basic skills supplement	200,000	523,389
Enhance WorkSource Responsiveness to Advanced Manufacturing: Development of a stronger connection between business and the publicly funded workforce system.		
Training for WorkSource staff	100,000	211,482
High Tech U: Engage rural HS students in exploration of high tech careers		30,000
<b>TOTAL</b>	<b>376,467</b>	<b>2,146,150</b>
<b>ALIGNING CURRICULUM:</b> Use of WorkKeys to complete job profiles and identify tasks, skill sets, proficiencies to enhance curriculum and training program development related to advanced manufacturing. Continued development of Career Pathways roadmap to identify and fill gaps in Pathways with new curricula. Development of re-careering strategies for mature workers to increase the advanced manufacturing workforce. (Contract with PCC)		
Includes Career Pathways Roadmap and Re-Careering		
College partners project manager, .75 FTE	63,750	
WIRED liaisons at each college, .5 FTE x 4	102,800	
Fringe at 34%	56,627	
Travel	3,025	
Supplies	1,000	
Subcontracted job profiling (14 profiles)	60,000	
Subcontracted curriculum development	63,000	
Indirects at 10%	35,020	
<b>TOTAL</b>	<b>385,222</b>	<b>1,246,231</b>



<b>TRAINING FUND:</b> Training fund allocations responsive to industry need and consideration of regional economic growth.	<b>0</b>	<b>858,000</b>
<b>WIRED COORDINATION/ADMINISTRATION:</b> Administration, coordination, and fiscal agency for grant. Staffing for Council, work groups, and skill panels.		
Project Manager, 1 FTE (the grant provides 35% of cost)	30,000	
Fringe (the grant provides 35% of the cost)	7,800	
Travel	485	
Supplies (tech and office allocations and economic modeling service)	21,984	
Facilitation & Communication Assistance (WIRED Technical Assistance)	60,000	
<b>TOTAL</b>	<b>120,269</b>	<b>251,297</b>
<b>TOTAL DIRECT COSTS</b>	<b>992,208</b>	<b>4,726,928</b>
<b>INDIRECTS AT 7.13%</b> (WSI federally approved rate; not applied to TA)	<b>66,466</b>	<b>332,752</b>
<b>GRANT TOTAL</b>	<b>1,058,674</b>	<b>5,059,680</b>

## 6. Technical Assistance Requests

With this Implementation Plan modification, WIRED partners are requesting \$60,000 from the technical assistance fund available to WIRED grantees to contract for professional meeting facilitation and communication support. As we have proceeded with our implementation, it has become clear to us that a skilled facilitation and communications professional would be necessary to help us engage all of our key partners and stakeholders. We will use the TA funds to competitively procure for that support. The work plan for the successful bidder will be as follows:

### 1) Facilitation

Contractor will develop and execute a meeting facilitation plan that

- a) Involves work with the WIB directors and Coordinating Committee to craft a vision statement for the WIRED initiative.
- b) Charts critical decision points, deliverables, progress and achievements.
- c) Includes facilitation of meetings of the Coordinating Committee and the Regional Workforce Council.
- d) Helps the Coordinating Committee and Regional Workforce Council establish a suitable decision making processes.

### 2) Communications

Contractor will develop and execute a communications plan that:

- a) Includes the processes and tools for communication with stakeholders, for example, development of “one-pagers” for local elected officials and press releases for media exposure.
- b) Assures that all stakeholders are informed and involved, as appropriate.

- c) Enhances internal communication among and between work groups and leadership groups, and external communication with WIRED stakeholders.
- d) Uses the WIRED website, [www.wirednw.org](http://www.wirednw.org), to its maximum advantage.

Please note that the TA funds are included in the budget on page 17, under **WIRED Coordination/ Administration**

REGIONAL WORKFORCE COUNCIL	
Agnes Balassa	Executive Director, The Enterprise for Employment & Education
Andrew McGough	Executive Director, Worksystems, inc.
Audrey Theis	President, Key Links, Inc
Bob Knight	President, Clark College
Bob Lanier	Executive Director, Oregon Bioscience Association
Brendan Glaser	Dean, Workforce & Continuing Education, Lower Columbia College
Camille Preus	Commissioner, Oregon Department of Community Colleges and Workforce Development
Charles Lake	Board Director, Northwest High Performance Enterprise Consortium
Claire Berger	Workforce Policy Advisor, Governor's Office
de Drae Cottrell	Regional Manager, Oregon Employment Department
Dennie Houle	Business Development Officer, Oregon Economic and Community Development Dept
Eileen Casey White	Pathways Coordinator, Chemeketa Community College
Erin Flynn	Economic Development Director, Portland Development Commission
George Reese	Director of Instructional Programming & Innovation, Clark College
Hue Le	President, PicoJet, Inc.
Jan Godfrey	Dean, Workforce Development, Clackamas Community College
Jerry Turner	President, Pioneer Pump, Inc,
Jim McLaughlin	President, Lower Columbia College
Jon Ostling	Training Manager, Cascade Steel
Judy Juhola	Regional Manager, Oregon Employment Department
Julie Gassner	Director, Management & Training Corporation
Karen Humelbaugh	Education and Workforce Systems Director, Oregon Department of Community Colleges & Workforce Development
Keith McPhun	Director, Back End Manufacturing, nLight Photonics Corp.
Kim Freeman	Dean, Economic & Workforce Development and Industrial Technology, Mt. Hood Community College
Laurie Warner	Director, Oregon Employment Department
Lisa Nisenfeld	Executive Director, Southwest Washington Workforce Development Council
Lita Colligan	Associate VP – Strategic Partnerships, Oregon Institute of Technology
Michelle Rose	Chair, Semiconductor Workforce Consortium
Norm Eder	Executive Director, Manufacturing 21 Coalition
Pamela Murray	Dean, Workforce and Economic Development, Portland Community College
Pamela Treece	Executive Director, Regional Partners for Business
Ray Burstedt	President, Strategic Economic Development Corp.
Sarah Garrison	Business Development Officer, Oregon Economic and Community Development Dept
Sheila Martin	Director, Institute of Portland Metropolitan Studies, Portland State University
Terri Houde	Executive Director, Workforce Investment Council of Clackamas County
Tom Fox	Business Development Officer, Oregon Economic and Community Development Dept

**US Department of Labor  
Employment & Training  
Administration  
(Grantor)**

**Oregon Department of Community  
Colleges & Workforce Development  
(Grantee)**  
**Co-Project Director**

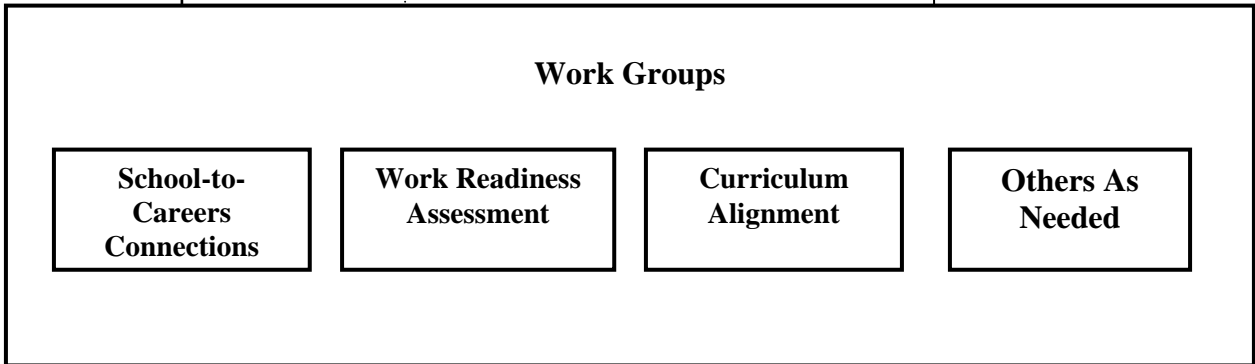
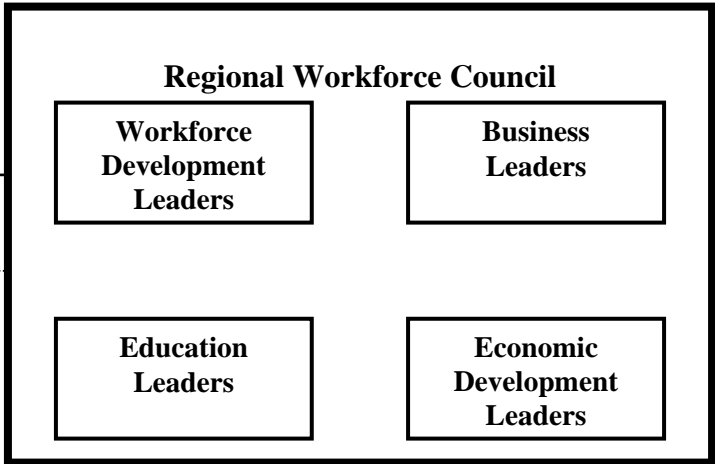
**Worksystems, Inc.  
(Administrator/Fiscal Agent)**  
**Co-Project Director**  
**Project Manager**

## **WIRED NORTHWEST**

**WIB Directors**

**Coordinating  
Committee**

**Facilitation &  
Communication  
(TA Support)**





STATE OF WASHINGTON  
EMPLOYMENT SECURITY DEPARTMENT  
PO Box 9046 • Olympia, WA 98507-9046

December 20, 2007

Mr. John R. Beverly, III  
Administrator, Office of Performance and Technology  
U. S. Department of Labor  
Employment and Training Administration  
200 Constitution Avenue NW, Room S-5206  
Washington, DC 20210

Dear Mr. Beverly:

I am requesting Southwest Washington, through the Southwest Washington Workforce Development Council, be included in the WIRED grant awarded to WorkSystems, Inc. of Portland.

Much of Southwest Washington is part of the Portland metropolitan area, with roughly 60,000 residents (about 1/3 the workforce) commuting to Oregon daily for jobs. Approximately 10,000 Oregonians commute to Vancouver each day. Clark County in Washington has been the fastest growing segment of the Portland/Vancouver PMSA for several years and forecasters believe that trend will continue.

The Southwest Washington Workforce Development Council and WorkSystems have worked cooperatively on several projects in the last few years and look forward to building on that work through the impressive initiatives outlined in the WIRED grant. Much of this work, including the development of sectoral approaches that focus on education, training and hiring investments, follow Washington's building of a regional workforce system that can compete in the global marketplace.

Please contact me if you have any questions about this request. We are always supportive of cooperative agreements with our Oregon neighbors.

Sincerely,

Karen T. Lee  
Commissioner

cc: Lisa Nisenfeld





Public Service Building

255 Capitol Street NE

Salem, Oregon 97310

Phone (503) 378-8648

Fax (503) 378-3365

[www.odccwd.state.or.us](http://www.odccwd.state.or.us)



October 31, 2007

Ms. Emily Stover DeRocco  
Assistant Secretary  
Employment and Training Administration  
United States Department of Labor  
200 Constitution Avenue N.W., Room S2307  
Washington, D.C. 20210

Dear Assistant Secretary:

On behalf of the Oregon Department of Community Colleges and Workforce Development, the operational and administrative entity for the Oregon Workforce Investment Board (OWIB) and the Workforce Investment Act (WIA), I am requesting approval of three proposed WIA waivers which will modify the Oregon State Plan. This request consists of three waivers developed at the request of the seven Local Workforce Investment Areas in accordance with the WIA, Section 189(i)(4)(B); 20 CFR 661.400(c) – 661.420, and the Training and Employment Guidance Letter referencing the development and submission guidelines for waiver requests.

The Oregon State Plan waiver requests are for the following provisions:

- WIA Section 134 limiting the provision of incumbent worker training to 15% Statewide Activities funds;
- WIA Sections 129 and 134 prohibiting Individual Training Accounts (ITAs) for youth, except those co-enrolled and served as an adult or dislocated worker; and
- WIA Section 181 that prohibits the use of WIA Title I funds to support economic development activities.

Notice and opportunity for comment was made available through a public comment period of 30 days and included final approval from the Oregon Workforce Investment Board (OWIB) Executive Committee on October 17, 2007. Organized labor representatives were present and approved the request. The OWIB support letter is attached.

As a recent recipient of a WIRED grant, we believe the waivers will provide increased flexibility to the State of Oregon and the Local Workforce Investment Areas in implementing reforms to our State's workforce system. We anticipate that the added flexibility will decrease the administrative processes at both the state and local levels, thus enabling more funds to be used for direct services.

We respectfully submit this waiver request and look forward to receiving the Secretary's approval. If you have any questions or require additional information, please contact Karen Humelbaugh at 503-378-8648, extension 226, or email at [Karen.humelbaugh@state.or.us](mailto:Karen.humelbaugh@state.or.us).

Sincerely,



Camille Preus  
Commissioner

Enclosures

C: Andrew McGough, Executive Director, WSI  
Terri Houde, Executive Director, WICCO  
Agnes Balassa, Executive Director, The Enterprise  
Julie Gassner, Executive Director, MTC  
Martha Lyons, CSC  
Chuck Forster, Executive Director, LWP  
Jim Fong, Executive Director, TJC  
Kris Latimer, TOC/OWA  
Claire Berger, Governor's Office

EC: Local Liaisons



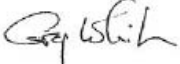
Public Service Building  
255 Capitol Street NE  
Salem, Oregon 97310  
Phone (503) 378-8648

## Oregon Workforce Investment Board

### M E M O

DATE: October 19, 2007

TO: Camille Preus  
Commissioner  
Community Colleges and Workforce Development

FROM: Greg White   
Executive Staff  
Oregon Workforce Investment Board

RE: **OWIB Approval of Waiver Requests**

Dear Camille,

At the regularly scheduled meeting of the Executive Committee of the Oregon Workforce Investment Board (OWIB) on October 17, 2007, the submission of the three agreed-upon requests for waivers to the WIA was approved. The vote was unanimous. OWIB bylaws state that the Executive Committee can act for the full board when there is a time restraint, as is the case for these waivers

The three waivers approved by the OWIB are:

- Waiver of the language limiting the authority to serve incumbent workers.
- Waiver of the language prohibiting the use of ITA's for youth.
- Waiver of the prohibition on the use of WIA funds for economic development activities.





**Department of Community Colleges and Workforce Development  
State of Oregon  
Workforce Investment Act Waiver Request**

Under the authority granted at Section 189 of the Workforce Investment Act (WIA), Oregon seeks the following waivers to assist in further advancing our workforce development system to be more demand-driven, flexible and responsive to its users. There are no State or local statutory or regulatory barrier to implementation of these waiver requests. These waiver requests were initiated by the Local Workforce Investment Areas and approved by the Oregon Workforce Investment Board.

1. Statutory/Administrate Requirements To Be Waived:  
**WIA Section 134 limiting the provision of incumbent worker training to the 15% Statewide Activities funds.**

Goals of the Waiver and Expected Outcomes:

The waiver would allow Local Workforce Investment Boards (LWIBs) to use all or a portion of their formula funds to conduct incumbent worker training. Incumbent workers would be defined as employed; and would not have to meet other eligibility requirements. This allows greater flexibility in meeting the needs of targeted sectors and incumbent workers. It would also enhance the ability of LWIB's to improve job retention, avoid layoffs, and increase the competitiveness of the sectors targeted in the WIRED initiative.

Individuals Impacted by the Waiver:

This waiver will benefit the participating employer, incumbent worker, job seeker and local service delivery area. The flexibility provided would encourage Local Workforce Boards to increase their services and become more responsive and innovative to meeting existing and new customers' needs.

Process to Use in Monitoring Progress in Implementing the Waiver:

The State and Local Area will monitor the process of the waiver through quarterly programmatic and fiscal reviews and reports. Data for the following will be collected and reported:

- Number of program participants;
- Number of program participants who completed training;
- Type of training provided;
- Length of training provided;
- Number of program participants who received a credential or certificate;
- Program participant's wage gain at completion of training and six months after completion; and
- Number of participants whose job classification changed or skills were upgraded.

2. Statutory/Administrate Requirements To Be Waived:  
**Title 20 CFR 664.510, prohibits the use of Individual Training Accounts (ITAs) for youth unless they are found eligible for and co-enrolled in either the adult or dislocated worker program.**

**Department of Community Colleges and Workforce Development  
State of Oregon  
Workforce Investment Act Waiver Request**

Goals of the Waiver and Expected Outcomes:

A waiver will maximize the service delivery capacity of WIA youth programs within the One-Stop Career Center delivery system. It would allow youth who are determined not to follow the academic track and are, instead, employment focused to have the same access as adults and dislocated workers to the advantages of ITAs. The WIA youth system will transform building a more robust pipeline of workers for targeted industries and occupations through a focus on academic preparation, intensive career counseling and exposure and transition support for the success of enrolled youth in post-secondary education and training.

By providing a waiver to all the use of ITAs for youth, without the need for co-enrollment, those youth whose assessment has determined that an ITA is the best strategy would be treated equally with an adult who has the same or similar needs and training strategies. Being able to charge the ITA cost to the youth program instead of the adult or dislocated worker program would reduce the dependence on limited adult funds.

Individuals Impacted by the Waiver:

The impact of the waiver would be on older youth, who would benefit from ITAs. Indirectly, the waiver would also affect local eligibility workers, who would not have to expend staff time on collecting eligibility data and going through the duplicative eligibility determination process.

Process to Use in Monitoring Progress in Implementing the Waiver:

The State and LWIBs will report on the numbers of youth provided with ITAs. State monitors will select youth ITA files for review, to ensure that there are appropriate levels of assessment documentation in the files to justify the use of ITAs for any individual older youth.

3. Statutory/Administrative Requirements To Be Waived:

**WIA Section 181(e) of the WIA, Limitation on use of funds - Prohibits the use of WIA Title I funds for "economic development" activities.**

Goals of the Waiver and Expected Outcomes:

Oregon seeks a waiver of the provision at WIA Section 181(e) that prohibits the use of funds for economic development activities that are not directly related to training for eligible individuals. Our intent is to use funds for economic development activities that have a direct connection to workforce development and human capital solutions. Consistent with the objectives of our WIRED implementation, we will undertake efforts that promote workforce and economic development collaboration in system building for the purpose of:

- talent development and management,
- identifying skill requirements of business,
- developing industry-recognized competency models, and
- developing joint innovation strategies in areas of mutual importance.

**Department of Community Colleges and Workforce Development  
State of Oregon  
Workforce Investment Act Waiver Request**

We will not use funds for activities such as infrastructure development or business financing.

Individuals Impacted by the Waiver:

Local areas, local and regional economic departments, and local governments who evidence an interest and a need to collaborate with LWIBs for layoff aversion, business retention, expansion and attraction activities.

Process to Use in Monitoring Progress in Implementing the Waiver:

The State and LWIBs will ensure funds are used only for economic development activities that have a direct tie to workforce development and human capital solutions, such as work related to identifying skill requirements of business and developing industry-recognized competency models. Funds will not be used for activities such as infrastructure development or business financing. This information will be reported and monitored by the Oregon Department of Community Colleges and Workforce Development through specific reporting requirements at regular frequencies.