

State of Oregon: Workforce Innovation and Opportunity Act Annual Performance Report Narrative

Program Year 2022: July 1, 2022 – June 30, 2023

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Submitted by:
Oregon Employment Department &
Oregon Higher Education Coordinating Commission
December 2023

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I. INTRODUCTION

Program Year in Review

This program year marked a turning point for WorkSource Oregon. The economic rebound, combined with WSO centers and reemployment programs being fully operational for the first full program year since services were paused during the pandemic, led to significantly improved performance outcomes over the prior program year as measured by employment rates in the second and fourth quarters after exit, for the Workforce Innovation and Opportunity Act (WIOA) Title I Adult, Dislocated Worker and WIOA Title III Wagner-Peyser programs. Customer satisfaction rates for both job seekers and employers also increased over the prior program year.

Despite this success, performance outcomes for those facing barriers to employment (long-term unemployed, low-income, displaced homemakers, individuals with disabilities, single parents and those experiencing re-entry) continues to lag statewide averages. Challenges in returning to work include lack of current and transferable skills, employment gaps, transportation, childcare, and other factors disproportionately affecting underserved and underrepresented communities.

To address those needs, the state continues to focus on a braided service delivery strategy to co-enroll job seekers with workforce programs, where possible, such as Supplemental Nutrition Assistance Program (SNAP) Training and Employment, WIOA Title I Adult and Dislocated Worker and Trade Readjustment Assistance. These programs complement core labor-exchange and job-matching services through case management, re-training, and financial assistance both pre- and post-employment with transportation, tools, clothing and other job-related expenses.

To provide equitable access to virtual appointments statewide, WSO implemented a statewide service delivery model for virtual appointments in March 2023. This model allows staff across the state to serve job seekers by video conference regardless of customer location, thus increasing operational efficiency and containing costs by leveraging staff resources. The department is continuing to look for ways to enhance this model through phone system upgrades and refinements to its online scheduling software for video conference appointments.

To support its commitment to serving its diverse customer base and ensuring a standard level of services across the state, the state updated the [WSO Standards](#) in June 2023. The Standards provide a basic level of guidance to help ensure minimum requirements are met and standardization exists around operations and service-delivery in WSO Centers.

The state continues to invest in business services, using a regional business services model to support workforce investment activities and meet the needs of local businesses in finding and building its workforce. This model has proven successful in building high-functioning business services teams which serve as a single point of contact for businesses across the state in rural and metro communities. Improved communication and coordination of service delivery between workforce partners has resulted from this braided service approach and allowed for more streamlined and targeted placement of WorkSource Oregon customers, particularly those facing barriers to employment.

The business services model includes several innovative programs, some of which have gained national attention. These include a partnership with LinkedIn for employers to match to and

network with WorkSource Oregon candidates through an online recruiter platform; hiring job developers to help connect job seekers facing barriers to employment with businesses; partnering with Google to offer skills-training programs; and a 'work ready' initiative to help job seekers identify their job readiness skills to increase their chances of being a successful candidate.

In closing, the Oregon Employment Department and Oregon Higher Education and Coordinating Commission would like to thank all the WSO partners who helped design and implement the many programs outlined in this document and for their ongoing commitment to serving Oregonians.

Workforce Innovation and Opportunity Act (WIOA) in Oregon

Through WIOA's programs, local, civic, business, and workforce development leaders implement strategies that leverage funding and resources within their local communities, to prepare and match the skills of workers with the workforce demands of businesses. Many state agencies, partners, and stakeholders support workforce development, and education efforts across the state.

In Oregon, WIOA programs are administered by:

- Title I – Office of Workforce Investments, Higher Education Coordinating Commission
- Title II – Office of Community Colleges and Workforce Development, Higher Education Coordinating Commission
- Title III – Oregon Employment Department, Workforce Operations Division
- Title IV – Oregon Department of Human Services and the Oregon Commission for the Blind

This report was developed with assistance and collaboration from all the agencies above. (See Appendix for more information regarding Oregon's workforce partners.)

Oregon is part of the national workforce development system that is funded by the Workforce Innovation and Opportunity Act (WIOA), which authorizes local business-led workforce development boards to oversee workforce development services through a network of American Job Centers (or AJCs, also called One-Stop Career Centers). In Oregon, AJCs are branded as WorkSource Oregon centers. Oregon has an integrated, one-stop service delivery, built on a standardized model to provide a flexible, unified workforce education and training system that consistently exceeds customer expectations.

WorkSource Oregon

WorkSource Oregon (WSO) is a network of public and private partners who work together to effectively respond to workforce challenges through high-quality services to individuals and businesses, resulting in job attainment, retention, and advancement. Partners include all state agencies that administer the WIOA required core programs, and all of Oregon's local workforce development boards.

The operation of the centers is governed by the WorkSource Oregon Operational Standards, which provide the minimum-level content/services required to be available at all WSO centers/American Job Centers in Oregon, as we work toward development of a seamless, customer-facing service delivery system. The WSO Operational Standards include roles and responsibilities for workforce system partners, as well as guidance on system requirements and services.

II. REQUIRED COMPONENTS

Effectiveness in Serving Employers

Effectiveness in Serving Employers: Program Year 2021

Pilot Approaches	Numerator/Denominator	Rate
Employer Penetration Rate	9,015/176,293	5.1%
Repeat Business Customer Rate	8,222/16,343	50.3%

Effectiveness in Serving Employers: Program Year 2022

Pilot Approaches	Numerator/Denominator	Rate
Employer Penetration Rate	7,692/191,930	4.0%
Repeat Business Customer Rate	4,917/12,931	38.0%

Definitions of the two pilot measures used to evaluate Effectiveness in Serving Employers:

- Employer Penetration Rate - The percentage of establishments using core program services out of all Oregon establishments.
- Repeat Business Customer Rate - The percentage of employers receiving core program services more than once in the previous three years.

Oregon is exploring trends in this measure to identify any potential changes to its service delivery model and effects to future performance outcomes.

Program Evaluation and Research

Program Evaluations and Continuous Improvement

The Workforce Talent and Development Board (WTDB) Continuous Improvement Committee (CIC) is charged with assessing the effectiveness of Oregon's public workforce development system, or WorkSource Oregon. WorkSource Oregon is a system comprising public and private partners who work together to respond to workforce challenges faced by individuals and businesses across Oregon. The purpose of the CIC is to:

- Complete a continuous improvement assessment of WSO Oregon every even-numbered year.
- Ensure that the assessment is jointly supported and participated in by all WSO Oregon partners.
- Consult with Local One-Stop Operators and align assessments with center certification requirements and State monitoring efforts.

In support of a recommendation from the CIC's [Initial Assessment Report](#) (Coraggio Group, 2021) to clarify and communicate the current WorkSource Oregon accountability and evaluation system, Coraggio Group was engaged to conduct an in-depth analysis of WorkSource Oregon's governance and accountability structure, with a particular focus on the participating state agencies responsible for allocating programmatic resources originating from the federal WIOA Titles and closely related workforce development programs delivered through WorkSource Oregon (WSO). This [Governance Assessment Report](#) emphasized a state level view and the WTDB members are looking at how additional local WSO partner input can be incorporated going forward. Approved by the WTDB in December 2022, it was forwarded to the Governor and legislature. It included four pillars necessary for good governance within the WSO system and associated near and long-term recommendations:

- Pillar One: A Clear and Shared Definition of the System

- Pillar Two: Committed Leadership from the Governor & Executive Branch
- Pillar Three: A Strong, Educated, Empowered, and Accountable State Board.
- Pillar Four: State Agency Alignment

The CIC is planning the next Assessment to be completed in 2024.

The WTDB anticipates two new reports coming in the next Program Year. The first is the 2024 Talent Assessment. The second is the Self-Sufficiency Standard for Oregon 2023 which is a report produced every three years in partnership with Worksystems (local workforce development board). Both reports can be found on the [WTDB's Data and Reports](#) webpage.

Finally, the WTDB will be establishing a policy workgroup in 2024 to facilitate collaboration, transparency, and accountability for system and governance policies affecting the workforce system. The workgroup will include WTDB, local workforce development board, and other WorkSource Oregon representatives and policy subject matter experts.

Planned Evaluation and Related Research Projects

States are required to implement federal Reemployment Services and Eligibility Assessment (RESEA) interventions and service delivery strategies that have strong evidence to support their work, and to evaluate any strategies without such evidence. OED is in negotiation with a third-party evaluator to begin a 3-year evaluation of the RESEA program starting in 2024. The purpose of the evaluation is to determine if changes to the program will result in better employment outcomes for participants. OED looks forward to this evaluation and the opportunity to make significant research-based improvements to the RESEA program and related workforce programs.

State Efforts to Support Federal Evaluations

The U.S. Department of Labor (DOL) contracted with Mathematica to evaluate the impact of reentry programs supported by several grant programs: Training to Work, the Reentry Demonstration Project, and the Reentry Project. These programs provide job training and employment support to boost participants' inclusion and integration into society, employment opportunities, family support, and economic and social self-sufficiency. A data sharing contract was finalized in PY 2022 with Mathematica and they were provided a dataset of customer demographics to support federal evaluation efforts.

Common Exit and Co-Enrollment

Currently, Oregon does not employ a common exit for all the WIOA titles I and III core programs but is making efforts towards aligning management information systems and State policy for its implementation. Oregon supports and promotes co-enrollment between all programs for which individuals have been determined eligible.

WorkSource Oregon Management Information System (WOMIS)

WOMIS is the statewide electronic information environment that supports the mission and vision of WSO. The WOMIS environment is a network of applications for the administration, and delivery of services, under the Workforce Innovation and Opportunity Act (WIOA). Additionally, data from the various applications are used for federal, operational and performance reporting. WOMIS applications support the following programs and functions: common registration and potential program eligibility, Wagner-Peyser program, Trade Act program, Adult, Dislocated Worker and Youth Programs, and managing program enrollment episodes.

Common Registration – Supporting Application: Customer Registration

In WSO, job seeker registration starts by creating an account with username and password to ensure security of personal information. The WOMIS Customer Registration (CR) application captures customer information and demographics, and identifies special populations, such as Veterans and Migrant Seasonal Farmworkers. It also captures program eligibility components for the Wagner-Peyser, Adult and Dislocated Worker programs. Data captured in CR is shared with numerous workforce applications used in the delivery and tracking of Title I, Title III, and Trade Act services; this ensures all programs have consistent customer information, avoids duplication of data, and supports co-enrollment across WIOA core programs. CR is managed by OED and HECC.

Scheduled for PY 2023, CR will no longer determine Adult and Dislocated Worker eligibility. Instead, eligibility determination will be performed locally by Title-I staff and managed in I-Trac, the state's case management system for WIOA Title-I. This change is intended to improve the accuracy of Dislocated Worker eligibility which can be complicated and nuanced. WSO began planning for these system changes in PY 2022, which are part of a larger work effort to simplify the intake and registration process for non-Title I customers.

Wagner-Peyser – Supporting Application: iMatchSkills (iMS)

The iMS application supports the administration and delivery of labor-exchange (employment) services for numerous federal programs, including Jobs for Veterans State Grants (JVSG), Migrant Seasonal Farmworker (MSFW), Reemployment Services and Eligibility Assessment (RESEA), and SNAP Employment and Training. It utilizes data from CR, as well as employer tax records and UI data, to support staff in the delivery of labor-exchange services. iMS includes a self-service component for job seekers and employers to conduct job matching. iMS is managed by OED.

Trade Act – Supporting Application: Trade Adjustment Assistance MIS (TAAMIS)

The TAAMIS application supports the administration of participant activity while in Trade Act programs. TAAMIS is a staff-access only application. It utilizes data from Customer Registration, as well as affected worker lists from trade-affected companies and UI data, to support staff in the delivery of Trade Act services. TAAMIS is managed by OED.

Adult and Dislocated Worker Programs – Supporting Application: I-Trac

I-Trac is a case management and funder reporting application that supports the delivery of Adult, Dislocated Worker, and Youth services under WIOA for all nine local boards in Oregon. I-Trac supports the customer records for National Dislocated Worker Grant participants, as well as a variety of direct federal, state, and local grants the boards manage. I-Trac is a staff-access application and is the back-end application for a customer-facing, interactive job seeker and program service delivery website, My WorkSource. I-Trac is managed by Worksystems, the Portland Metro workforce development board.

Managing Episodes across Wagner-Peyser, Adult and Dislocated Worker, Trade

WOMIS receives regular feeds of qualifying services, as recorded by staff in iMS, I-Trac and TAAMIS, to auto-calculate participation and exit dates. This allows WOMIS to manage episodes for customers receiving services from one or more of the following programs: WIOA title I Adult and Dislocated Worker, WIOA title III Wagner-Peyser, JVSG and Trade Act. WIOA title I Youth episodes are managed through I-Trac.

A participant must receive a qualifying, participant-level service from any eligible program (excluding Youth) at least once every 90 days to keep their program enrollment episode open. If a qualifying service is not received for 90 consecutive days, the episode will automatically exit. The customer must then re-register, at which point their eligibility for WIOA title I and III programs is reassessed, and a new episode begins when a qualifying service is received.

Co-Enrollment Finding

January 2023 Oregon received a Co-Enrollment finding from the San Francisco Regional Office of the Department of Labor, Employment and Training Administration for the required WIOA Title I Dislocated Worker Program and Trade Adjustment Assistance Program Co-Enrollment.

PY22 PIRL Co-Enrollment percentages per quarter 3.7 %, 9.96%, 16.20%, 14.69%

- At the onset of the TAA Final Rule, requiring co-enrollment between the two programs the Oregon Employment Departments Central Trade Act Unit and the HECC OWI Dislocated Worker Unit created a state TAA/OWI team to implement the required Co-Enrollment between both programs. The team created joint co-enrollment guidelines and led by the Dislocated Worker Unit a Rapid Response and Co-Enrollment policy, which brought together state leadership and representatives from the Local Boards. The policy was published on January 2022 and was listed nationally on the [Workforce GPS State Co-Enrollment Resources page](#). HECC OWI removed the Oregon’s Rapid Response and Co-Enrollment policy to undergo a different development process. Oregon did not have an active Rapid Response, Common Exit or Co-Enrollment Policy during this time frame.
- On August 2-4, 2022, the Oregon Trade Act program and the OWI Dislocated Worker Unit hosted the first ever Oregon Braided Services conference. Consuelo Hines, DOL/ETA Region 6 - San Francisco Office Trade Act and DUA Programs Coordinator and Susan Worden, Division Director, Performance Management and Data Reporting, Office of TAA, ETA DOL presented and answered questions on co-enrollment for over 150 in attendance including state leadership for Title I Dislocated Worker program, Trade Act staff, Dislocated Worker Unit, Dislocated Worker Liaisons, Rapid Response Coordinators, Program Managers, Area Managers, Local Workforce Development Boards Executive Directors, and Business Services.
- Two workgroups, a state level Co-Enrollment Data Workgroup and a Program Co-Enrollment Workgroup established by the Office of Workforce Investments, Higher Education Coordinating Commission and the Oregon Employment Department Trade Adjustment Assistance (TAA) Program for Workers, in response to Oregon receiving a Finding from the DOL ETA regarding the Co-Enrollment performance requirement. Co-Enrollment workgroup members discussed 34 points from the Dislocated Worker Customer Timeline Discussion Points and received technical assistance from ETA DOL representatives Tim Théberge, Susan Worden, Kimberly Powell, and Carol Padovan.

The Dislocated Worker Customer Timeline and Co-Enrollment Workgroup Work Session Overview is attached in the addendum.

Data Validation

Please see the attached Appendix for the state's draft Joint Data Validation (DV) Policy and Framework outlining the steps taken to ensure reported data is accurate, which includes DV timing and scheduling each program year prior to certification of annual data reports, random sampling methodology, documentation protocols for correction of missing and/or erroneous records, data element error rate calculation methodology and thresholds, the maintenance of data validation results and records reviewed (such as freezing wage records) to comply with the federal records retention policy, periodic source documentation and data accuracy training for program and provider staff, follow-up training for local staff to address data elements and source documentation types with high error rate trends above the state threshold each program year, ongoing data entry control and monitoring protocols, the approach for the regular review of the quality of reported program data, and regular assessment of the effectiveness of the DV process.

The State successfully performed a review of PY 2022 source documents against the management information systems (MIS) and/or other systems of record, and the Participant Individual Record Layout (PIRL) by the end of September 2023, in accordance with TEGs 7-18 and 23-19, for the following WIOA programs: Wagner-Peyser and Trade Adjustment Assistance. Due to limited staffing, the state will not complete PY 2022 Title IB Adult, Dislocated Worker and Youth DV until December 2023. Below are the steps for each program to conduct DV.

WIOA Title IB Core Programs and Dislocated Worker Grants

1. Second Quarter 2023 PIRL participant data was loaded into an Excel workbook.
2. The Excel file was sorted by local Workforce Development Board (WDB) and WIOA-funded title I program, and DWGs.
3. Sample size and methodology:
 - a. A total of 280 records were randomly selected from all of Oregon's local WDBs, spanning the Adult, Dislocated Worker, and Youth programs, and Oregon's DWGs.
 - b. Data elements were reviewed against management information systems and other systems of record in accordance with the draft state DV policy and established WIOA title I DV procedures. Normally, DV is conducted in the 3rd calendar quarter.
4. Failures will be documented on each participant file spreadsheet as an item to address, with actions required to correct the individual file, or to correct the process moving forward.

Wagner Peyser

1. Quarterly, throughout the program year, PIRL participant data was loaded into an Excel file.
2. Sample size and methodology:
 - a. Throughout the program year, a total of 25 Wagner Peyser records and 25 Jobs for Veterans State Grant records (for a total of 50 records) were randomly selected. The samples included a mix of active and exited reportable individuals and participants.
 - b. The sample size methodology is based on a set number of participant records. The required data elements were reviewed against management information systems and other systems of record in accordance with state DV policy and established WP DV procedures. DV is conducted each calendar quarter.
3. Failures were documented on each participant file spreadsheet as an item to address, with actions required to correct the individual file, or to correct the process moving forward.

Trade Adjustment Assistance (TAA)

1. Second Quarter 2023 PIRL participant data was loaded into an Excel file.
2. 25 records were randomly selected using the RAND function.

3. Sample size and methodology:
 - a. The annual DV sample covers at least seven different regions of the state (the 25 records include cases from at least 20 certifications). The sample includes a mix of active and exited participant records.
 - b. The sample size methodology is based on a set number of participant records. The required data elements were reviewed against management information systems and other systems of record in accordance with state DV policy and established TAA DV procedures. DV is conducted in the 3rd calendar quarter.
4. Failures were documented on each participant file spreadsheet as an item to address, with actions required to correct the individual file, or to correct the process moving forward.
5. Errors identified in the PY 2022 monitoring response have been resolved and were tested with the third quarter 2023 PIRL participant data.

DV Follow up and Correcting Errors

As outlined in the state's Data Validation policy and framework, state DV staff request follow-up documentation within 90 days from their program coordinators, detailing how DV processes have been corrected. As such, for some programs, PY 2022 DV outcomes are still under review with opportunities to refine the process and improve data quality.

Assessment of the Effectiveness of the DV Process

Each program is responsible for assessing the effectiveness of its data validation process to identify areas of improvement. This has led to some process improvements. For example, WP program staff updated their DV worksheet to help streamline the review of PIRL elements against source systems and identify potential areas in which data quality might be improved.

Ongoing Data Entry Control and Monitoring Protocols

Please refer to the Performance Accountability section of this document for a discussion of the state's Quality Feedback Measures (QFM) program. This program helps to ensure the accuracy of the data entered into the state's labor-exchange system by program staff. In addition, starting in PY 2022, WP begin conducting quarterly DV for a small sample of PIRL records.

Quarterly Report Analysis

To support WIOA data validation efforts, DOL developed the Quarterly Report Analysis (QRA) technical assistance tool to identify anomalies and outliers, and other potential data quality issues which may indicate reporting inaccuracies with the PIRL. The QRA tool is intended to help states identify issues that may require additional attention or correction for WIOA Title IB and WP reporting. Although Oregon is not a pilot state required to respond to QRA results, QRAs are being analyzed to increase positive results in specific QRA areas. Both WIOA Title IB and WP use the following basic process to work through and remedy each QRA.

1. Oregon receives QRAs from U.S. DOL for the most recent quarter.
2. Queries are built to replicate U.S. DOL numbers.
3. Results are analyzed to determine the following potential anomalies:
 - Front and back-end anomalies in the management information system (MIS)
 - PIRL script anomalies
 - Preliminary business process anomalies
4. Results are analyzed to identify necessary changes to management information systems, business processes or PIRL scripts.
5. Changes are implemented and tested by program staff.

Of the QRA categories for WP reporting (Veteran’s Priority, Program Entry Alignment, Program Exit Alignment, Service in Current Quarter, Record Add and Record Drop), Oregon met DOL targets in two out of the six categories at the start of PY 2022. To improve QRA reporting, extensive data analysis was performed throughout the program year that resulted in updates to data collection systems and PIRL reporting scripts. Through this work, Oregon’s QRA performance for WP improved, with the state meeting targets in five out of the six categories by year-end. QRA results for WIOA Title IB programs have demonstrated mixed results, with some measures showing increases and other measures showing slight decreases. Oregon will continue to monitor and address QRA results for both WIOA Title IB and WP programs.

Waivers

Oregon had no WIOA waivers in place during PY 2022.

III. OPTIONAL COMPONENTS

Customer Satisfaction

Methodology

The Customer Satisfaction Survey is part of Oregon’s workforce performance measurement system. OED administers monthly surveys to measure the satisfaction of businesses and individuals who have received workforce services. Customer satisfaction measures can be aggregated by workforce development areas and a report period (year, month, or quarter). In addition, individual customer satisfaction measures can also be aggregated by demographics.

The Customer Satisfaction Survey also gathers data on several satisfaction drivers, including six Key Performance Measure (KPM) questions that are required by the Oregon State Legislature for both individual and business customers. (See Appendix for survey questions.)

Selection Process

The Business survey includes employers who closed a WSO job posting during the previous month. The same business can be selected for the survey only once per program year. The Individual survey includes customers who completed WOMIS CR during the previous month and/or filed an initial claim during the previous month.

Customer Satisfaction Feedback

Customers receive an email invitation to complete the survey using a web-based survey platform. The Individual survey is available in English and Spanish. Survey responses are the basis for the customer satisfaction performance measures, which are published on the Performance Measures page of the [QualityInfo.org](https://www.qualityinfo.org) website, available to the public.

Customers can also provide qualitative feedback by answering these questions: “If you were in charge of the Employment Department, what one thing would you change or add?” and “Could we have done anything to better help you? If so, please list your idea(s) in the space provided.”

These comments are shared with management every month, after survey responses are processed. Customer Comments Reports (one for individuals and one for business responses) provide management with greater detail about customer experience. WSO centers are required to develop, implement, and actively manage the two feedback loops aimed at aligning and improving

services. Each WSO center manager assigns staff to respond to the customer, note their discussion, and send the results back to management by the 15th of each month. Staff use this as an opportunity to connect with the customer that took the time to provide the feedback, thanking them for doing so, and obtaining ideas of how we can better collaborate and meet their needs. We implement the feedback received and follow up to continually build on our services.

Customer Satisfaction (includes Overall Satisfaction & Likely to Recommend): PY 2021

Customer Type	Number Selected / Surveyed	Response Rate
Businesses	5,015	7%
Individuals	99,290	7%

Customer Satisfaction (includes Overall Satisfaction & Likely to Recommend): PY 2022

Customer Type	Number Selected / Surveyed	Response Rate
Businesses	3,818	7.4%
Individuals	109,350*	8.15%

*Individual Overall Satisfaction and Likely to Recommend rates have reached or are very close to their pre-pandemic rates. Business Overall Satisfaction and Likely to recommend rates continue to fluctuate at or below pre-pandemic rates.

Results – Program Year 2022

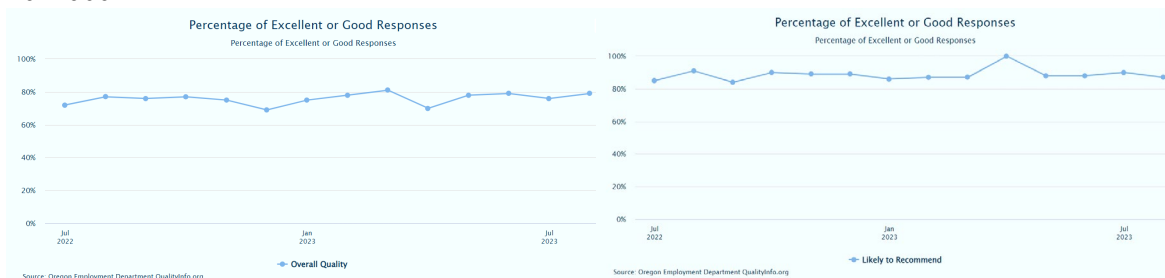
Program Year 2022 has seen a return of Individual customer satisfaction in Overall and Likely to Recommend. These are at or near their pre-pandemic rates, even exceeding them in Likely to Recommend in February of 2023.

Historically, Business Satisfaction rates have been somewhat inconsistent and have trended downward during tight labor markets. These trends continue, although the rates are still trending somewhere between slightly better than pandemic rates to slightly lower than the pre-pandemic rates. Business satisfaction has not yet seen a full return to its pre-pandemic rates.

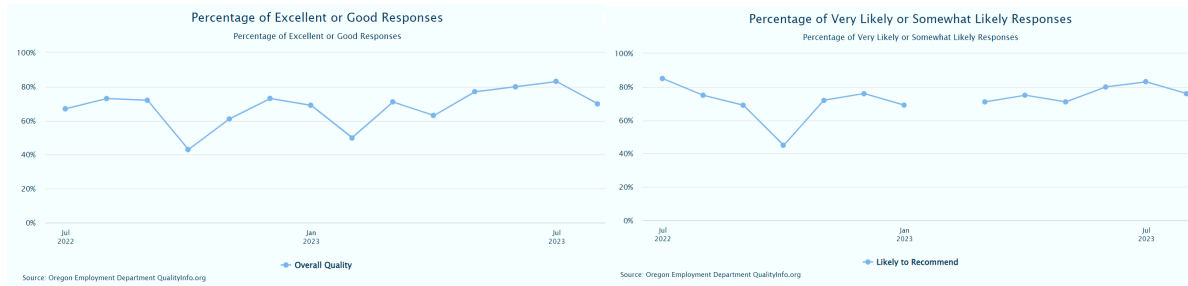
The agency experienced a significant shift in staffing during the pandemic; with a large contingency of staff, both management and front-line, coming on board during or after. This shift has required a focus on staff education to bring knowledge forward to meeting current operational needs. The expectation is to see continued improvement in customer satisfaction rates as a result, along with OED’s movement towards workforce operations modernization, allowing progress in system improvements.

Key Customer Satisfaction Indicators: July 2022 thru August 2023

Individual



Business



Performance Accountability System

Quality Feedback Measures (QFM)

Oregon’s self-appraisal system, called Quality Feedback Measures (QFM), underwent significant improvements during Program Years 2022-2023. After successfully re-launching in April 2022, process and system improvements were further implemented during PY 2022 to ensure accuracy of the audit and the collection of data to make informed decisions. Changes are highlighted below.

Process Improvement

The number of QFM reviewers across the state was reduced to allow a more focused approach in the way we conduct audits. Refresher training was delivered to streamline the review process, communicate changes, and seek feedback on trends, patterns as well as address existing concerns. And finally, a robust instructional guide was created to help ensure staff consistently follow outlined steps while completing reviews.

Programming Updates to Support Current Employment Services Model

Workforce Operations Division envisioned a service delivery model that is not restricted by a customer’s geographical area. With the advancement in technology and virtual platforms gaining strength, WO began phasing in this change in PY 2022. To align QFM with this new service delivery model, Job Seeker sample records are now selected based on services provided by the office, regardless of where the customer is located. Records are audited to ensure that they meet the standards set for employment services.

Data Transition to Tableau to Ensure Data Integrity and Data Validation

During PY 2022, numerical data generated through the completed reviews was transferred to Tableau (a business analytics platform). Prior to that, reviews were manually calculated using a spreadsheet, which was time consuming and prone to errors. The shift to Tableau ensured data integrity and data visualization, which is instrumental in decision making. With this transition, business analysts can better identify and focus on areas needing improvement that QFM surfaces.

QFM Performance

The OED has selected certain criteria (categories) to review each month for a sample set of job seeker and job listing records. The criteria reflect the priorities outlined in the WorkSource Oregon Standards for serving customers. The state is pleased to note that PY 2022 performance matched or exceeded that of PY 2021 in four out of the five job seeker categories, and in nine out of the ten job listing categories. Several changes implemented in PY 2022 helped improve outcomes. These include process improvements (as discussed above), QFM refresher training for staff and ongoing dialogue between QFM reviewers and management to share information and best practices. To

view PY 2021 and PY 2022 QFM performance for job seeker and job listing categories, please see the Appendix (Quality Feedback Measures Outcomes).

Negotiated Performance Levels: Program Years 2021 and 2022

WIOA Title I and Title III Performance

Program Year 2021

Program	Measure	Negotiated Rate	Actual Rate
Adult	Employment Q2	71.4%	66.8%
Adult	Employment Q4	71.0%	61.8%
Adult	Median Earnings	\$6,400	\$7,963
Adult	Credential Attainment Rate	60.5%	67.4%
Adult	Measurable Skill Gains	51.0%	61.4%
Dislocated Worker	Employment Q2	71.4%	64.7%
Dislocated Worker	Employment Q4	72.0%	62.2%
Dislocated Worker	Median Earnings	\$6,800	\$8,048
Dislocated Worker	Credential Attainment Rate	63.0%	68.6%
Dislocated Worker	Measurable Skills Gains	51.0%	61.5%
Wagner-Peyser	Employment Q2	68.2%	58.1%
Wagner-Peyser	Employment Q4	68.0%	62.9%
Wagner-Peyser	Median Earnings	\$6,600	\$7,370
Youth	Employment, Education, Training Q2	63.5%	69.5%
Youth	Employment, Education, Training Q4	63.0%	64.7%
Youth	Median Earnings	\$3,477	\$4,765
Youth	Credential Attainment Rate	68.4%	52.3%
Youth	Measurable Skill Gains	51.0%	42.3%

Program Year 2022

Program	Measure	Negotiated Rate	Actual Rate
Adult	Employment Q2	68.2%	69.4%
Adult	Employment Q4	68.6%	67.8%
Adult	Median Earnings	\$6,883.00	\$8,593.20
Adult	Credential Attainment Rate	60.5%	73.1%
Adult	Measurable Skill Gains	55.1%	66.1%
Dislocated Worker	Employment Q2	69.4%	67.5%
Dislocated Worker	Employment Q4	66.6%	64.6%
Dislocated Worker	Median Earnings	\$7,100.00	\$8,356.19
Dislocated Worker	Credential Attainment Rate	66.8%	66.1%
Dislocated Worker	Measurable Skill Gains	55.0%	61.3%
Wagner-Peyser	Employment Q2	68.2%	65.1%
Wagner-Peyser	Employment Q4	68.0%	63.1%
Wagner-Peyser	Median Earnings	\$7,000	\$8,419
Youth	Employment, Education, Training Q2	63.5%	64.0%
Youth	Employment, Education, Training Q4	61.7%	62.9%
Youth	Median Earnings	\$4,259.00	\$5,525.00
Youth	Credential Attainment Rate	56.1%	55.7%
Youth	Measurable Skill Gains	51.5%	44.2%

JVSG Performance

Program Year 2021

Program	Measure	Negotiated Rate	Actual Rate
JVSG	Employment Q2	55.0%	53.9%
JVSG	Employment Q4	56.0%	49.2%
JVSG	Median Earnings	\$6,900	\$6,477

Program Year 2022

Program	Measure	Negotiated Rate	Actual Rate
JVSG	Employment Q2	51.0%	56.5%
JVSG	Employment Q4	50.0%	55.2%
JVSG	Median Earnings	\$6,600	\$8,174

Rapid Response Activities

Layoff Aversion

Rapid Response Teams across Oregon are ready to help dislocated workers return to work as quickly as possible following a job loss due to a layoff or closure. These teams provide information sessions to help explain a variety of services and options that are available to dislocated workers.

Layoff aversion efforts in local areas included:

- Providing support for employers to shift to online service models, or create remote working options for employees;
- Providing supplies to help local manufacturing teams to make medically approved face shields - working with local hospital administration, county officials, and regional CCO to identify scope and design for local manufacturers to make locally sourced face shields; and,
- Many other creative, innovative efforts.

PY 22 Summary of Data from the Oregon Rapid Response Activity Tracking System (ORRATS)

Laid off workers	3,317
Union Impacted Employees	628
Trade Impacted Employees	2,876
Total Rapid Response Information Sessions	165
Companies with Union Employees	7
Trade Petitions Filed	58

Please see Appendix F for a list of statewide plant closings and large layoffs.

Other Statewide Funded Activities

Wagner-Peyser Act 7(b) Funded Activities

Updates to Oregon’s Labor Market Information Website – QualityInfo.org

Oregon’s Systems Development team, under the leadership of OED’s Research Division, completed a project in November 2022 to migrate the QualityInfo.org website to an updated platform. This multi-year project incorporated new features for the site that increased its functionality and usability on mobile devices, along with other display changes for article and publication content.

- The project resulted in a completely redesigned homepage and regional pages. These were built to highlight article content with a centered listing for new articles and links to ‘More Articles’ that contain all the published content. Also included, were links to the most used job search tools and graphs containing job growth and unemployment insurance claims data developed during the pandemic.
- The site’s tools all got a refresh that both simplified the entry point into the tool and grouped all the filtering options in slide outs contained on the right-hand side that scroll on the page with the user on longer reports.

Supporting Oregon’s Workforce System:

The OED’s Research Division made major contributions to Oregon’s workforce system, providing data and analysis such as State of the Workforce Reports and information for sector strategies to local workforce boards for their strategic planning process.

The Research Division was heavily involved in assisting local workforce boards; sharing labor market information with students and educators around the state; and providing customized analysis for businesses, community organizations, and economic development entities.

Economic Analysis and Workforce Analysts’ activities include composing articles about the labor market, giving presentations about the economy and labor force to workforce boards, policymakers, business leaders, students, job seekers, and internal workforce system staff.

For examples of PY 2022 articles prepared by the Regional Analysis and Economic Analysis teams, including Job Vacancy Surveys (quarterly employer surveys to gain insight into job vacancies by region, industry, occupation, education level, and wage level and provide information about jobs that are most difficult to fill) and Wage Record Analysis, please see Appendix (Research Division Articles and Publications).

State Strategic Goals and Vision

The Oregon Workforce and Talent Development Board (WTDB) advises the Governor on strategies and alignment in the workforce system. Because the WTDB is made up of leaders representing business and industry, labor, community-based organizations, Oregon legislature, local government, and state agencies, it is uniquely positioned as Oregon’s workforce and talent development expert. The WTDB approved a new 2023-2024 Strategic Plan on June 9, 2023.

The WTDB initiated a Joint Priority Setting (JPS) initiative to be completed by September 2023. JPS is a new effort to gather input from the entire workforce system. Using current economic and workforce data, issues, challenges, and trends and using the WTDB’s Strategic Plan as a high-level framework especially the Vision and Values and the Imperatives and Objectives where appropriate, those engaged in the JPS process will discuss and ultimately agree to 3-5 priorities that can be shared across the entire workforce system for the upcoming 2-3 years. These shared priorities are expected to be incorporated into the WTDB Strategic Plan and WIOA local plans and shape budget and policy development.

Promising Practices for Other At-Risk and Priority Populations

WIOA Youth Program

PY 2022, youth in Oregon were subject to many common barriers, including home instability, learning disabilities (often previously undiagnosed), mental health, generational poverty, and an inability to successfully navigate High School and obtain a diploma. In PY 22, these barriers to individual success were still being heightened by the effects of COVID-19. Oregon WIOA Youth programs have responded by placing priorities on addressing these barriers and creating pathways to quality jobs that fit with the challenges youth in Oregon face.

Of the 2,008 Youth participants served in PY 22, all took part in career services. These services were crucial as the workforce has evolved post-pandemic and connecting youth to future career paths is more important than ever. Of the participants served, 605 youth participated in training programs, with 337 earning a Secondary School diploma/equivalent and/or a recognized postsecondary credential. These trainings and credentials provided entry into career pathways for youth throughout Oregon. Employment placement rates for youth with employment barriers averaged over 60% with long term unemployed youth participants being placed into jobs at 83.3%.

Job for Veterans' State Grant

The Jobs for Veterans' State Grant (JVSG) is a staffing grant that is 100% federally funded through the U.S. Department of Labor, Veterans' Employment and Training Service (DOL-VETS). JVSG funds staffing to conduct outreach to the business community and engage in advocacy efforts to increase employment opportunities for veterans, especially disabled veterans. The grant also provides staff funding for individualized career and training-related services to eligible veterans, and eligible persons with significant barriers to employment.

Disabled Veterans' Outreach Program Specialists (DVOPs) provide individualized career services to eligible veterans and eligible persons experiencing significant barriers to employment; Local Veterans' Employment Representatives (LVERs) conduct outreach to employers and business associations, and advocate for the hiring of veterans; and a few staff serve in a dual role, called Consolidated DVOP/LVER.

LVER Outreach to Mono and Bilingual Spanish Speaking Businesses

Jerry Flores (LVER) presented to the Woodburn Chapter of Latino Business Alliance and discussed the Jobs for Veterans' State Grant (JVSG) programs, Work Opportunity Tax Credit (WOTC), HIRE Vets Medallion Program (HVMP), and WIOA services offered from the local WSO center. Of the 24 businesses present, three initiated contact with the local WSO center for recruitment assistance. Following the meeting, Jerry was asked to also present to the Latino Business Alliance in Salem.

Outreach to White City Rehabilitation Facility – U.S. Department of Veterans Affairs:

Pete Pringle (DVOP) and Paul Rhodes (DVOP) developed a working partnership with White City Rehabilitation Facility to provide employment services to eligible veterans that have significant barriers to employment. They conduct outreach at the White City facility every Tuesday. The White City Facility has 600 residential rehabilitation beds and a Primary Care/Mental Health outpatient department that emphasizes rehabilitation.

2023 Women's Veterans Conference

Cris Wilcox (Consolidated DVOP/LVER) and Stephanie Hansen (Consolidated DVOP/LVER) were asked to present/brief on employment services at the 2023 Oregon Department of Veteran Affairs "Women Veterans Conference" in May 2023. Over 350 women Veterans attended this two-day

conference. Cris and Stephanie coordinated with a number of state and federal programs to facilitate a special WSO-focused workshop titled "Strengthening Your Career: Employment Resources, Social Media, Entrepreneurship, and Apprenticeships."

National Joint Work Group: VA Service-connected Disabled Veterans

Leon DuPont (DVOP- Intensive Services Coordinator) was selected by the U.S. Department of Labor to be on the National Technical Assistance Guide Joint Work Group because of his expertise with the U.S. Department of Veterans Affairs, Veterans Readiness and Training program. The Joint Work Group is charged with rewriting the Technical Assistance Guide which defines the roles and responsibilities of various federal and state agencies in serving Veterans in American Job Centers throughout the nation.

National Dislocated Worker Grants (NDWGs)

COVID-19 Disaster Recovery and Employment Recovery Dislocated Worker Grants (DWG)

During the spring of 2020, Governor Kate Brown and the President declared a state of emergency to address the spread of COVID-19. Shortly thereafter, the Governor issued directives instructing all businesses to urgently modify or halt operations to reduce the spread of COVID-19 in Oregon. These abrupt changes mandated upon local businesses and industries created a rapid and radically different form of recession resulting in many out of work Oregonians.

In response, Oregon applied for and received two NDWGs, the Disaster Recovery NDWG and the Employment Recovery NDWG. These grants were funded for a combined amount of \$6,000,000 with an initial project period of performance of March 13, 2020, through March 31, 2022. Oregon's nine Local Workforce Development Boards (LWDB) throughout its 36 counties received funding from the grants. Due to the many challenges experienced by the LWDBs throughout the pandemic, HECC requested and received grant modifications to both grants extending them an additional year. The new grant end dates were March 31, 2023.

The Disaster Recovery NDWG provided funding for disaster-related temporary employment, while both that and the Employment Recovery NDWG provided career and training services to minimize the employment and economic impact of COVID-19 in disaster declared areas as defined in 20 CFR 687.110(b). Enrolled participants in both grants had access to all basic, individualized, and training services offered by the WIOA Title I and Title III programs. Some of these services included outreach, intake, labor exchange services, initial and comprehensive career assessments, development of an individual employment plan, referral, basic computer literacy, information on eligible training providers, occupational training, on-the-job training (including apprenticeships), entrepreneurial training, customized training, resume/interviewing guidance, supportive services, and educating individuals about current demands in the local labor market so that their efforts would lead to eventual employment.

Temporary disaster-related employment included logistics and distribution of food and essential supplies, cleaning and sanitation, contact tracers, community health care screeners, community service workers, peer support specialists, PPE manufacturing and distribution and COVID-19 testing site administrators. Other efforts focused on Oregon's unhoused and other disadvantaged or vulnerable populations. Some of this work revolved around helping set up quarantine areas and aiding quarantined individuals, organizing and coordinating recovery, environmental services, assistance with mental health call lines, childcare assistance, cooks, drivers, community health

support workers including elder care, community resource navigators and vaccine and community outreach education.

Due to statewide mandated closures of the WorkSource Oregon (WSO) centers and training institutions, services designed to skill up participants and support businesses disproportionately impacted by the COVID-19 pandemic shutdown meant that alternative methods to reach individuals, determine eligibility and provide services had to be created. Local area staff met participants virtually determining eligibility and providing needed services. Many of the impacted workers were younger or had limited education. Access to and understanding of technology was a primary challenge for many of these participants. Women and people of color were also disproportionately impacted. Many of these workers needed additional education and training to reconnect with employment. Further, the inaccessibility of reliable childcare was cited repeatedly as a challenge experienced by many participants once training was complete and businesses began to reopen, creating additional challenges. Once the WSO centers began to reopen to in-person service delivery, most offices transitioned to a hybrid model allowing grant participants the option to receive services either onsite or through virtual avenues. Though fraught with initial challenges the projects moved forward at a much faster pace once the restrictions on WSO closures was lifted allowing all nine LWDBs to reach grant goals and outcomes, serving a total of 1,618 Oregonians prior to the end date of March 31, 2023. Individuals whose employment and training plans extend beyond the end of the grant period will be transitioned into formula funded programs.

Oregon Wildfires 2020 Disaster Recovery Dislocated Worker Grant (DWG)

Disaster declarations were issued by the president in September 2020, after wildfires damaged many regions in Oregon. In November 2020, Oregon was awarded a Disaster Recovery National Dislocated Worker Grant for six of Oregon's nine local areas. The project period is October 1, 2020, through September 30, 2023, and project activities include disaster-related temporary employment, and career and training services.

At the project onset, WorkSource Oregon (WSO) offices throughout the state were closed due to COVID, and local area staff began establishing and refining virtual services for participants, including eligibility determination processes, and determining how best to conduct project outreach. As the WSO centers across Oregon began reopening to in-person service delivery, they shifted to a hybrid model that allows DWG participants to receive services virtually or onsite.

The project continues and as the allowable period for temporary employment ends, service providers are focusing efforts to place participants who are completing training into jobs and ensuring that those whose employment and training plans extend beyond this grant project will transition into formula-funded program services.

SNAP Training and Employment

Supplemental Nutrition Assistance Program (SNAP) Training and Employment Program (STEP)

The Agriculture Improvement Act of 2018 (2018 Farm Act) provides guidance for the national SNAP Employment and Training (E&T) program. This legislation supports work as the pathway to self-sufficiency, well-being and economic mobility for individuals and families receiving supplemental nutrition assistance. It also encourages state and local innovations in training, case management, and program design. The United States Department of Agriculture administers the

national program and sends funds to the Oregon Department of Human Services (ODHS). In Oregon, the voluntary SNAP E&T program is called STEP (SNAP Training & Employment Program).

Able-Bodied Adults without Dependents

Informational Sessions were held in May and June 2023 prior to the start of the program in July. These sessions were attended by 168 ABAWD customers and provided potential participants with the opportunity to learn about the program's work requirements, how OED will help them achieve their employment goal, remain engaged in the program, and maintain their SNAP benefits.

Oregon Department of Human Services (ODHS)

OED works under an inter-agency agreement with ODHS to provide SNAP E&T components and services to SNAP recipients with a SNAP indicator in their iMatchSkills (labor-exchange) registration, with a SNAP E&T Orientation and Assessment. When SNAP recipients volunteer to participate in the program, they develop a written plan and receive coaching, case management, and support services, which lead to employment as the pathway to self-sufficiency.

SNAP E&T Components. OED fulfills the terms of the contract by providing Work Readiness Training activities that prepare individuals for the workplace; Job Search Training, which enhances the individual's job search skills; Supervised Job Search resulting in self-sufficiency and long-term employment stability; On-the-Job Training, which provides a work-based learning opportunity that results in permanent employment and a 50% training wage subsidy for the participating employer; and Job Retention coaching and support to assist the individual to retain employment.

FFY-23 Significant Activities:

Job Training: The STEP program funded educational opportunities for 974 STEP participants.

Breakout by type of training: Career, Technical, and Other Vocational Training (667), Short-Term Training (253), Basic Educational/Foundational Skills (51), English Language Acquisition (3).

Key trainings included: Billing and Coding Specialist, CDL Truck Driver, Certified Nurse Assistant, CDL Truck Driver, Dental Assistant, EKG Technician, GED, Medical Assistant, Medical Billing and Coding, Office Administration, Peer Recovery Coach, Phlebotomy, Real Estate Broker, and Welder.

Housing Support Services: Housing is a critical need in most every community in Oregon and it impacts historically underserved and low-income communities at higher rates than other Oregonians. The STEP program introduced a series of "Strategic Support Services" to provide a bridge for STEP participants who obtained full-time employment, to make the transition away from the SNAP program and onto self-sufficiency. With this strategic support, the STEP participant is provided with the opportunity to save portions of their first one or two paychecks and then assume their rent or mortgage payment in the third month of employment. During this program year, 53 STEP participants received \$48,864.21 of housing support.

Services for Justice Involved Oregonians. OED piloted a program serving adults in custody to increase employment opportunities for releasing Adults in Custody, reduce recidivism, making our communities economically stronger. The pilot at the Deer Ridge Correctional Institution is a partnership with Department of Corrections, WIOA Title I provider, and WSO Centers across the state. During the program year, 105 customers were registered while in custody and 76 were released. Of those released, 34 became active STEP participants, meeting with WSO center staff to

receive STEP services. Outcomes data was positive, with year-end data showing 79% either employed or enrolled in STEP supported training.

Job Placement: The STEP program relies on OED staff to enter manually placement information into iMatchSkills. During this program year staff recorded **2,934 placements of STEP participants**. For a breakout of placements by industry, please see the Appendix (STEP Placements by Industry).

Job Retention Skills: In partnership with the Rogue Valley Workforce Board, the STEP program provides STEP participants with six, virtual workshops developed specifically to develop soft-skills for the workplace and are vetted by the business community. These workshops, called “The Launchpad Series,” provided **257 STEP participants** with the tools to be successful on the job and blend with hard skills earned through job training. Completion of the six-week coursework results in a certificate of achievement that summarizes the skills learned that can be described during the job interview and observed on the job. Modules include, “Working with Respect”, “Solution Focused Thinking”, and “Building Your Professional Identity”.

Digital Inclusion and Connectivity: The STEP program continued its partnership with Free Geek and connected 255 STEP participants with laptops and internet access to ensure participants are online and connected to access to training and employment opportunities.

Focus on Historically and Currently Underserved Populations. In her document titled, “Diversity, Equity, and Inclusion Action Plan,” Governor Kotek directed state agencies to focus on underserved populations and to direct resources to “minimize the negative, disproportionate outcomes experienced by communities of color.” To raise awareness of the Governor’s effort, the STEP program created a report to inform managers of the number of STEP participants the program served who were within these populations. For a breakout of underserved populations served by the program, please see the Appendix (STEP Participants by Underserved Populations).

Business Services

At its core, WorkSource Oregon business services provides a local labor exchange where businesses can find the workers they need, and job seekers can gain employment.

WorkSource Oregon business services provides business and industry with customized workforce solutions that prepare and deliver qualified and viable candidates, and advances their current workers. Business services staff play a significant role in connecting job seekers with employment opportunities, and this role is dependent on WSO’s efforts to build and maintain successful relationships with businesses. A strong job development approach creates opportunities for applicants and businesses. Job development services will support targeted population customers as they attain sustainable and meaningful jobs.

To build a successful relationship, WSO staff conduct on-site employer visits prior to the start of a recruitment, then send employers qualified candidates in a timely manner. Conducting an on-site visit provides insight into the specific business’ needs, improving the quality of referrals and employment outcomes.

During this program year, Business Services continued to provide quality services to employers and businesses alike. With a tight labor market, staff spent more time connecting one-on-one with Oregon employers to assist in the evaluation of their competitiveness in the

labor market for talent acquisition and retainment. Staff worked with businesses to evaluate wages based on labor market data, and assisted employers with training and development opportunities for current staff. Staff also helped employers recruit candidates through use of the labor-exchange system, special events, outreach, and social media.

FFY-23 Significant Activities:

LinkedIn Partnership

The WSO's LinkedIn recruiter platform continues to be an important tool to help fill positions by sourcing candidates that are not within the labor-exchange system already. This process brings new candidates into the WSO system and provides them with the knowledge of programs and services to address the talent gap beyond recruitment. This partnership began in 2020 and has generated almost 20,000 followers, while gaining national recognition.

Grow with Google Scholarships

The Grow with Google scholarship program continues to be popular with job seekers. This program provides the opportunity for individuals to skill up in nine different courses including IT Support, User Experience Design, Data Analytics, Cybersecurity, Project Management and more with little to no experience. To date, WSO has provided scholarships to 855 customers with about a 67 completing certification and obtaining meaningful wage jobs.

Program collaboration

Partnerships continue to evolve with special programs serving targeted populations including SNAP Training and Employment, Reemployment Services and Eligibility Assessment (claimant reemployment program) Migrant Seasonal Farmworkers, Veterans, Title I Adult and Dislocated Workers, and Trade Act. These partnerships help ensure a pipeline exists for the referral of those customers for enhanced job matching and placement assistance.

Work Ready

The Statewide Work Ready program is designed to identify and promote validated job seekers directly to employers to expedite their employment. The program provides staff a set of criteria to assess an individual's readiness to plan and carry out a successful job search and, if hired, help them succeed on the job. Customers meeting all the criteria are flagged as Work Ready in iMS.

PY 2022 Business Services Data

In the program year, staff served over 7,600 businesses through outreach efforts and played a key role in recruiting, matching and screening candidates for over 2,260 staff-assisted job listings. These efforts resulted in a staff-assisted referral to hire ration of 2.63, with 40% of listings filled through direct recruitment and matching efforts. In addition to staff-assisted activities, employers posted over 130,000 self-referral job listings and another 253,000 job listings were downloaded from the National Labor Exchange, providing job seekers a rich source of listings to match to.

Reemployment Services and Eligibility Assessment (RESEA)

In PY 2022, OED continued to operate a statewide RESEA (claimant reemployment) program. The selection criteria includes all claimants with a valid claim that are not temporarily unemployed, in approved training or special programs, are members in good standing of a labor union that dispatches their members to their work, or are intrastate claimants. It also includes selection for those that had a non-valid claim that is redetermined valid within 25 days of processing, and all

transitioning ex-service members. Claimants who complete their initial RESEA, remain unemployed for more than five additional weeks, and are deemed most likely to exhaust benefits before returning to work, are selected for a subsequent RESEA.

RESEA interviews include orientation to WIOA services, referral to reemployment services and training, provision of labor market information, development of an individual Reemployment Plan, assessment of UI eligibility, and a review of reported work search activities for recently claimed weeks. Potential issues detected are referred to UI staff. RESEA program delivery of claimant interviews continues to include both in-person and virtual options.

RESEA program staff work to connect claimants, after completion of their initial RESEA interview, with critical support services available through WSO partner programs such as SNAP Training and Employment, WIOA title I programs for career and training services, and regional business services staff for enhanced job matching and placement assistance including job development.

In PY 2022, Oregon completed 29,084 initial RESEA interviews - a significant increase from 10,775 initial RESEAs in PY 2021. The completion rate for these initial RESEA conversation was 62%.

Additional Promising Practices and Innovative Approaches

Apprenticeship Program

Registered Apprenticeship is integral to Oregon's workforce and education system. The registered apprenticeship system consists of multiple stakeholders, including the Bureau of Labor and Industries (BOLI), Higher Education Coordinating Commission (HECC), Oregon Employment Department (OED), Oregon Department of Education (ODE), Oregon community colleges, union and non-union training centers and industry. HECC, BOLI, OED, and ODE work together on an inter-agency apprenticeship team to support and collaborate on various work efforts related to improving the registered apprenticeship system.

In PY 2022, apprenticeship programs continued to expand. There has been an increased interest in apprenticeship from a variety of groups and is being considered as a solution for economic recovery from the pandemic. In the last year, new programs have been approved, new organizations are showing interest and support for apprenticeship, and more funding than ever before has been secured. Included below are the many exciting developments relating to apprenticeship expansion in Oregon.

State Apprenticeship Expansion, Equity, and Innovation Grant (SAEEI)

In July 2021, the Higher Education Coordinating Commission (HECC) was awarded the State Apprenticeship Expansion Equity Innovation (SAEEI) grant totaling \$3.9 million from the Department of Labor. The grant runs into 2025 and has helped HECC to prioritize equity, and access to the apprenticeship programs throughout Oregon. The grant has served 392 participants so far, with all being from diverse and underrepresented communities. HECC is also using these grant funds to expand into IT programs that might not have been otherwise available to underrepresented communities. HECC has helped organizations serve apprentices in general construction trades, as well as behavioral health and drug and alcohol certifications. HECC has been able to create structure and guidelines around how Oregon invites individuals from underrepresented communities to advance their careers in apprenticeships.

Apprenticeship Programs include: Registered Apprenticeship Programs include Certified Pharmacy Technician, Certified Nursing Assistant, Firefighter, Early Childhood Educator, Commercial Building Energy Analyst, Behavioral Health Counselor, Limited Energy Technician B, Youth Industrial Manufacturing Technician, and Carpenter Interior/Exterior Specialist.

Pre-Apprenticeship Programs include: NECA-IBEW 48 Electrical, Construction Trades, Medical Assistant, and Umpqua Pre-Apprenticeship Program.

Future Ready Oregon

Future Ready Oregon, an historic \$200 million workforce investment package passed in 2022, invests in existing successful programs, and in innovative equity-focused solutions to bolster recruitment, retention, and career advancement opportunities for priority populations. Many of the funds are being administered through the Higher Education Coordinating Commission (HECC), working with local workforce development boards, community-based and culturally specific organizations, education and training providers, employers, and communities. The WTDB has a continuing implementation role, including some oversight, consultation, and development of industry consortia in manufacturing, healthcare, and technology.

Each Industry Consortium will bring together public, private, and community-based partners statewide to identify barriers to equitable participation in Oregon's workforce in manufacturing, healthcare, and technology and assess statewide workforce needs, skills standards, and career pathways. The Consortia will develop strategic policy and funding recommendations to advance a more equitable workforce system, addressing gaps, and seizing opportunities to grow and diversify Oregon's workforce. The Healthcare Industry Consortium met for the first time in spring 2023 and kicked off its work by hearing about Oregon's healthcare workforce landscape, employer needs, and equity in recruitment, retention, and career advancement strategies. The Manufacturing and Technology Industry Consortia will launch in the next Program Year.

The Oregon legislature provided funding to multiple state agencies to support for via Senate Bill 1545. This Bill (SB 1545) also supports the development and delivery of new and emerging apprenticeship programs and increased the ability to offer Oregonians even more options to attain family-sustaining wages through apprenticeship and pre-apprenticeship programs.

The grants have been awarded to community-based organizations, labor organizations, local workforce development boards and other entities to develop apprenticeship and pre-apprenticeship training programs that prioritize program participation by apprentices from populations historically underrepresented in apprenticeship. There have been 3 rounds of funding with 49 awarded grants that reach all 9 of Oregon's local workforce development areas. OED continues to train WorkSource Oregon staff and workforce system partners on the basics of registered apprenticeship. Registered apprenticeship training is offered to every new WorkSource Oregon staff person as part of their onboarding process. This training gives staff a foundation of registered apprenticeship knowledge, and the online tools available to assist a job-seeking customer in navigating and understanding the registered apprenticeship system. Apprenticeship connections in WorkSource centers are primarily focused on how to connect job seekers to registered apprenticeship programs. The training also addresses how to coach a customer with barriers to employment to access pre-apprenticeship, or other preparatory programs.

Additionally, Oregon continues to promote registered apprenticeships to businesses and

employers through workforce partnerships, and the Oregon Apprenticeship website, which has multiple guides available on how to create and maintain a registered apprenticeship program. The website also contains several explainer videos for job seekers and businesses around registered apprenticeship. The intent of the guides and training videos is to create a shared understanding for customers around how to navigate the apprenticeship system.

Trade Adjustment Assistance for Workers Program

The Trade Adjustment Assistance (TAA) Program is a Department of Labor program which offers a variety of benefits and reemployment services to help unemployed dislocated workers who lose their jobs or whose hours of work and wages are reduced as a result of foreign competition prepare for and obtain suitable employment. Workers may be eligible for training, job search and relocation allowances, income support, and other reemployment services.

Connection to the Oregon Workforce System

As a required partner to WorkSource centers, the Oregon TAA Program is active and engaged with WIOA partners and WorkSource staff. Collaboration occurs in all stages of potential and trade-affected worker service delivery, from Rapid Response, petition filing, case management through program exit.

TAA Work-Based Learning Promising Practices

Oregon's Statewide TAA Union Career Development Consultant facilitates the national Work-based Learning Community, a state-led, peer-to-peer group, and provide on-the-job training technical guidance to Case Managers, Navigators and Career Development Coordinators.

TAA On-the-Job Training Promising Practices

Oregon's Statewide TAA Union Career Development Consultant teamed up with one of Oregon's Trade Act Navigators to streamline the communication flow between Trade Act Navigators, Career Development Coordinators, Employers and Trade Act Dislocated Workers. All Trade Act On-the-Job Training forms and processes were updated including the creation of an Occupational Skills Assessment. This tool compares ONET skills clusters to job listings and a participants' prior work experience to easily identify the skill gaps around which the OJT Training Plan is developed. The Occupational Skills Assessment and Training document is attached in the addendum.

Statewide TAA Union Career Development Consultant Position Promising Practice

Oregon's Statewide TAA Union Career Development Consultant has identified three key areas for the position. Those areas include connections to work-based learning, the State Labor Liaison, and statewide Business Services.

TAA and Oregon's State Labor Liaison Promising Practice

Oregon's State Labor Liaison and Oregon's Statewide TAA Union Career Development Consultant meet regularly to share information about pending layoffs and project work. They co-presented at the Braided Services Conference in August 2022 and at the October 2022 Work-based Learning Community meeting and provided a follow-up blog that's posted to Workforce GPS. The presentations and blog focused on how we work together to reach Trade affected workers, and the uniqueness of our roles. Our projects have included researching all Oregon certified petitions from the past seven years, and the State Labor Liaison then was able to help identify potentially trade-impacted companies for outreach layoff aversion strategies.

The Union Connection: How Oregon's New Position Leverages Resources for Workers

Additional Promising Practices and Innovative Approaches

- **Reengagement Campaign**

Trade Act Navigators started reengagement campaigns in July to formerly certified trade eligible dislocated workers. Over 47,000 letters were mailed and over 17,000 auto-dialers reached out to the trade affected dislocated workers resulting in 65 new trade dislocated workers. Trade Act Navigators began calling thousands of dislocated workers on formerly certified petitions that had low engagement. This included Hermiston Foods, NORPAC, and Oracle.

- **Enhancing Worker Engagement**

The TAA program supports ten Career Development Coordinator positions incorporated into the WSO centers to develop area outreach plans that include TAA, WIOA, Federal and Title III programs to market to employers and leverage the work-based learning and WorkSource partnership resources by identifying training needs and opportunities that will align job seekers' skills with employer needs.

Diversity, Equity, Inclusion, and Accessibility (DEIA)

All state agencies are required by Governor Kotek to have a DEIA Action Plan, updated every two years. Below are *excerpts* from OED's and HECC's DEIA initiatives, along with links to plans.

Oregon Employment Department

The Workforce Operations division promotes equity and inclusion in internal and customer-facing interactions with tailored outreach to priority populations in all regions of Oregon. The priority is to transform outreach into engagement. Workforce Operations staff regularly engage with Oregonians facing crises and have received training around Trauma Informed Care and transformational coaching methods. Workforce Operations acknowledges that its customers also face many additional barriers to service and re-employment such as racism, ageism, bias towards gender identity, and other biases related to protected classes. This concern is at the forefront of the division's service delivery, and they have worked with the SNAP Training and Development program to include payment for gender-affirming documentation for individuals who participate in the program and are in need. The division continues to consider ways to support inclusivity within its own workforce and will provide additional training related to bystander intervention and the identification and history of structural racism as part of this action plan.

Some of the division's priority populations include Black, Indigenous, and other communities of color; veterans, including disabled veterans; people who have been justice-involved; migrant seasonal farmworkers; people with disabilities; tribal employers and workers; and rural Oregonians. To assist with meaningful access, its website worksourceoregon.org has been professionally translated into 11 languages, following the agency's Language Access Procedure and Equity Framework. WorkSource Oregon centers also employ a high number of bilingual employees and are trained in working with customers with disabilities to make sure we are giving them equitable access to our services.

Sample Actions Identified in the Plan for Workforce Operations

- Create and pilot a community engagement plan within the SNAP Employment and Training and Able Bodied Working Adult program in Workforce Operations and in collaboration with ODHS and other community partners.
- Learn from other divisions about how they have invested in priority populations and identify areas for improvement within Workforce Operations for greater budget equity and complete a root-cause analysis for barriers faced.

Oregon HECC Equity Lens

The Oregon Higher Education Coordinating Commission Equity Lens is a cornerstone to the State’s approach to postsecondary education and training policy and funding, with a focus on Oregonians who are currently and historically underserved in access to and success in postsecondary education and training. The Equity Lens is used to assess how current and proposed policies, programs and practices benefit and/or burden underserved learners and communities; make intentional equity-informed decisions, actions, targeted interventions, investments and enact systemic change; strengthen public involvement; clearly articulate our shared goals of an equitable education system; and create clear accountability structures.

TAA Technology for Underserved Communities Pilot

An evaluation of Oregon’s TAA PIRL data shows that around 57% of the state’s trade-affected dislocated workers fall into at least one Underserved Communities group, as defined by the State of Oregon Equity Framework. While job loss due to foreign trade is devastating to both individuals and communities, trade related layoffs might have a more significant impact on historically underserved communities. For this reason, the Oregon TAA program decided to perform targeted outreach to worker groups that have shown low levels of engagement in recent years to try to reengage them with services.

For the purpose of the Technology for Underserved Communities Pilot, the definition of our historically and currently underserved communities include Oregonians who are: Native Americans, members of Oregon’s nine federally recognized tribes, American Indians, Alaska Natives; Black, Africans, African Americans; Latinx, Hispanic; Asian, Pacific Islanders; immigrants, refugees, asylum seekers; undocumented, DREAMers; linguistically diverse; people with disabilities; LGBTQ+; aging/older adults; economically disadvantaged; farmworkers, migrant workers; and living in rural parts of the state.

The Technology for Underserved Communities Pilot continues in PY 2022. The pilot provides equitable technology access to minorities and underserved populations, economically and technically disadvantaged communities, and those in rural areas living in technology deserts. Technology for Underserved Communities Pilot Trade Affected Dislocated Workers: Approved: 66, Entered Occupational Training: 27, Employed: 21.

Adult Priority of Service

In PY 2021, the WTDB updated the State’s *Priority of Service Policy*, which can be found [here](#).

IV. APPENDICES

Appendix A — Oregon’s Workforce Partners

Higher Education Coordinating Commission (HECC) Agency – WIOA Titles I and II, NDWGs

The State of Oregon's Higher Education Coordinating Commission (HECC) envisions a future in which all Oregonians—and especially those whom our systems have underserved and marginalized—benefit from the transformational power of high-quality postsecondary education and training. The HECC’s eight (8) offices include the Office of Workforce Investments (OWI) and the Office of Community Colleges and Workforce Development (CCWD).

OWI and CCWD have direct administrative responsibility for many of the activities identified in the Adult, Dislocated Worker, and Youth programs identified in title I of WIOA and the Adult Education and Literacy activities identified in title II of WIOA. In these roles, the HECC distributes workforce funding, provides fiscal oversight and accountability for workforce programs, and provides policy direction and technical assistance to state and local workforce partners, staff, and other stakeholders statewide.

- The Office of Workforce Investments (OWI) is responsible for convening partnerships in the workforce system, supporting and providing technical assistance to Oregon’s Workforce and Talent Development Board (WTDB) and local workforce development boards, and implementing the Governor’s vision and the WTDB strategic plan. The OWI administers the Workforce Innovation and Opportunity Act (WIOA) Youth, Adult, and Dislocated Worker programs, Federal Discretionary grants, and National Dislocated Worker Grants.
- The Office of Community Colleges and Workforce Development (CCWD) provides coordination, leadership and resources to Oregon’s 17 locally-governed community colleges, 17 adult basic skills providers, community-based organizations and other partnerships. CCWD administers Title II of WIOA, also known as the Adult Education and Family Literacy Act. This provides federal funds to local providers and supports leadership and training in order to assure quality basic skills services for adults across Oregon, including English language instruction for adults.

Oregon Employment Department (OED) – WIOA Title III (Wagner-Peyser/ES, TAA, MSFW)

The Employment Department strives to promote employment of Oregonians through developing a diversified, multi-skilled workforce, and providing support during periods of unemployment. Through 39 offices across the state, the department serves job seekers and employers by helping workers find suitable employment; providing qualified applicants for employers; supplying statewide and local labor market information; and providing unemployment insurance benefits to workers temporarily unemployed through no fault of their own.

OED’s Workforce Operations division supports numerous workforce programs and initiatives, including Employment Services, RESEA, Trade Act, and MSFW programs. The division is also charged with helping ensure Oregonians develop the skills they need to sustain rewarding careers and businesses have the talent they need to be competitive.

Oregon Department of Human Services/Vocational Rehabilitation (ODHS/VR) – WIOA Title IV

The Oregon Department of Human Services (ODHS) is Oregon’s principal agency for helping Oregonians achieve wellbeing and independence through opportunities that protect, empower, respect choice, and preserve dignity, especially for those who are least able to help themselves.

Vocational Rehabilitation (VR) assists individuals with disabilities to get and keep a job that matches their skills, interests, and abilities. VR staff work in partnership with the community and businesses to develop employment

opportunities for people with disabilities. VR is a state and federally sponsored program which assists people with all types of disabilities, except for Blindness or Deaf-Blindness, in all areas of the state.

Oregon Commission for the Blind (OCB) – WIOA Title IV

The Oregon Commission for the Blind was established in 1937 as a state agency to provide services to Oregon’s citizens who experience vision loss and need specialized training and support to live full and productive lives. The agency receives policy direction and oversight from a seven-member commission representing consumer organizations, education, ophthalmology/optometry, business, and individual citizens.

The OCB Vocational Rehabilitation (VR) program provides Oregonians with job readiness assistance. Experienced VR counselors help clients hone many of the skills necessary to obtain or retain employment. Counselors also work to pair businesses in search of skilled and dedicated employees with a pool of talented candidates. All OCB job readiness services are free to qualified Oregonians and to the employers who hire them.

Role of the State Workforce and Talent Development Board (WTDB)

The Workforce Talent and Development Board (WTDB) is Oregon’s state-level workforce development board and is the overall advisory board to the Governor on workforce matters, including developing a strategic plan for Oregon’s Workforce Development System. Appointed by the Governor under the Workforce Innovation and Opportunity Act, the WTDB is made up of leaders representing private business, labor, community-based organizations, Oregon legislature, local government, and state agencies. The majority of the 41-member board represents business.

Workforce and Talent Development Board (WTDB) Vision and Imperatives

The WTDB’s vision is equitable prosperity for all Oregonians. To realize this vision, the WTDB advances Oregon through education, training, jobs and careers by empowering people and employers by:

- Leading and communicating a long-term vision for Oregon that anticipates and acts on future workforce needs;
- Partnering with workforce, education, and training entities including Local Workforce Development Boards (LWDBs);
- Advising the Governor and the legislature on workforce policy and plans;
- Aligning public workforce policy, resources, and services with employers, education, training, and economic development;
- Identifying barriers, providing solutions, and avoiding duplication of services;
- Promoting accountability among public workforce partners; and
- Sharing best practices and innovative solutions that are scalable statewide and across multiple regions within the entire workforce system.

Essential to realizing the WTDB’s vision, four Imperatives are identified by the WTDB and communicated to state and local partners and stakeholders. These are:

- An inclusive workforce system that advances equitable prosperity.
- Clear understanding of and improved use and impact of the workforce system.
- The WTDB is embraced by the Governor as an accountable convener, empowered facilitator, and informed advisor.
- Strategic and close alignment between education, economic development, and workforce development, including public and private partners.

Local Workforce Development Boards

Local Workforce Development Boards are a group of community leaders appointed by local elected officials and charged with planning and oversight responsibilities for workforce programs and services in their area. These boards are made up of individuals representing business, education, economic development, organized labor, community-based organizations, state agencies, and local government. Oregon has nine Local Workforce Areas to support locally driven decisions and programs. These Boards play multiple roles in their communities:

- Convener: Bringing together business, labor, education, and economic development to focus on workforce issues and promote strategic alignment.
- Workforce Analyst: Developing, disseminating, and assisting with the analysis of current labor market and economic information and trends in industry sectors in partnership with the Oregon Employment Department Research Division.
- Broker: Bringing together community stakeholders to solve common problems; aligning systems and strategies; forging new relationships between business and education.
- Community Voice: Articulating the issues for the needs of a skilled workforce. Demonstrating and speaking to the effectiveness of training programs.
- Capacity Builder / Investor: Enhancing the region’s ability to meet the workforce needs of local employers through the utilization of federal and state funds.

For more Information on local areas, visit:

- [Northwest Oregon Works](#)
- [Worksystems](#)
- [Clackamas Workforce Partnership](#)
- [Willamette Workforce Partnership](#)
- [Lane Workforce Partnership](#)
- [Southwestern Oregon Workforce Investment Board](#)
- [Rogue Workforce Partnership](#)
- [East Cascades Works](#)
- [Eastern Oregon Workforce Board](#)

Other Important Partnerships

The Oregon Workforce Partnership (OWP) is composed of leaders from Oregon’s nine Local Workforce Development Boards. Each local workforce area is designated by the Governor. Chief Local Elected Officials from each local area identify organizations to serve as the Local Workforce Development Boards.

OWP provides leadership that promotes and advances Oregon’s workforce system. They envision that Oregon’s workforce system ensures all Oregonians possess the talent needed for communities to thrive and prosper.

Appendix B — Draft Statewide Data Validation Policy

Overview

The Workforce Innovation and Opportunity Act (WIOA) Section 116(d)(5) directs states to establish procedures to ensure the data contained in the State’s Annual Performance Report(s) is valid and reliable. These procedures are broadly referred to as “data validation.”

This requirement is reiterated in 20 CFR 677.240(a): “States must establish procedures, consistent with guidelines issued by the Secretary of Labor or the Secretary of Education, to ensure that they submit complete annual performance reports that contain information that is valid and reliable, as required by WIOA sec. 116(d)(5).”

As part of these guidelines, the US Department of Labor (DOL) issued Training and Employment Guidance Letter (TEGL) 07-18, *Guidance for Validating Jointly Required Performance Data Submitted under the Workforce Innovation and Opportunity Act (WIOA)*, which provides information to States and grantees of DOL and the US Department of Education (ED) on the performance accountability system requirements set forth in section 116 of WIOA. Specifically, this guidance provides information about the guidelines States must use in developing procedures for ensuring the data submitted are valid and reliable.

TEGL 7-18 describes a Joint Data Validation Framework that applies to programs administered by DOL and ED and includes, “While States must utilize a data validation strategy, the specific design, implementation, and periodic evaluation of that strategy is left to the discretion of the State so long as those strategies or procedures are consistent with these guidelines.”

Later, DOL released TEGL 23-19 *Guidance for Validating Required Performance Data Submitted by Grant Recipients of U.S. Department of Labor (DOL) Workforce Programs*, which provides information to grant recipients of DOL workforce programs, including states, and provides guidelines for grant recipients to use in developing procedures for ensuring the data submitted for performance reporting are valid and reliable.

TEGL 23-19 contains specific requirements for states’ Data Validation Framework and further describes the framework, “The WIOA Core programs and the TAA program must use a data validation strategy. However, these programs and the other non-core program grant recipients have the discretion to decide the specific design, implementation, and periodic evaluation of that strategy, so long as those strategies or procedures adhere to this guidance.”

Policy Statement

The Higher Education Coordinating Commission’s (HECC) Office of Workforce Investments (OWI) and the Oregon Employment (OED) have developed a Data Validation Framework for the WIOA core programs they administer and the Trade Adjustment Assistance program. This data validation framework consists of

- Attachment A – Data Validation Framework
- Attachment B – DV Source Document Collection

This policy and its attachments apply to all WIOA core programs administered by OWI and OED, the Trade Adjustment Assistance program, the Jobs for Veterans State Grants (JSVG), and National Dislocated Worker Grants (DWGs). These programs must also adhere to their respective programs’ presiding federal guidance for the program year data being validated.

As per TEGL 23-19, these programs and the other WIOA core and non-core program grant recipients have the discretion to develop additional policies, guidance, or other documents that pertain to the specific design, implementation, and periodic evaluation of that strategy, so long as those strategies or procedures adhere to all relevant federal and State guidance.

Effective Date

[Upon posting]

Required Action

All entities that administer WIOA core programs, non-core programs, and TAA grant recipients must review the attached documents and may develop additional, program-specific guidance, as necessary.

Contact

Questions are to be referred to hecc.owi-workforce-policy@hecc.oregon.gov.

Attachments

- Attachment A – Data Validation Framework
- Attachment B – DV Source Document Collection

References

The Workforce Innovation and Opportunity Act (WIOA)

TEGL 07-18 - Guidance for Validating Jointly Required Performance Data Submitted under the Workforce Innovation and Opportunity Act (WIOA)

TEGL 23-19 - Guidance for Validating Required Performance Data Submitted by Grant Recipients of U.S. Department of Labor (DOL) Workforce Programs

Appendix C — Joint Data Validation Framework

**Oregon’s PIRL Data Validation Framework
For WIOA Title I Dislocated Worker, Adult, and Youth,
WIOA Title III Wagner-Peyser, Jobs for Veterans State
Grants (JVSG), and the Trade Adjustment Assistance
(TAA) Programs - DRAFT**

Effective 6/22/2022

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Oregon’s PIRL Data Validation Policy

This policy covers the following federal programs: WIOA Title I Dislocated Worker, Adult, and Youth, WIOA Title III Wagner-Peyser, Jobs for Veterans State Grants (JVSG), National Dislocated Worker Grants (NDWGs), and the Trade Adjustment Assistance (TAA) Programs.

The State performs data validation (DV) to ensure reporting accuracy and reliability, system integrity, and outcome improvement. The State will conduct DV for the applicable programs annually, follow-up on DV results, and provide technical assistance and/or corrective actions, as applicable. The State’s DV efforts will be certified in the Annual Statewide Performance Narrative Report.

The State will review source documents against the management information systems (MIS) and/or other systems of record, and the Participant Individual Record Layout (PIRL) in accordance with existing guidance provided by the US Department of Labor (currently TEGs 7-18 and 23-19). The State will also conduct technical reviews of the PIRL to ensure data reporting procedures are valid and reliable.

The sample selected for review will include records of participants at various stages of their involvement with applicable programs.

Data Validation Frequency

The State will conduct DV annually, typically in the 3rd calendar quarter and will conduct follow-up and provide technical assistance, as needed or requested. Individual programs

governed by this framework may have differing, program-specific start and end dates for data validation activities. The State's data validation methodology will be addressed and certified in the WIOA Annual Statewide Performance Report Narrative.

It is expected the State will conduct Data Validation in late August to September of each year.

Sample Methodology

To select the sample size, performance staff collaborate with their IT division to randomly select from active and exited records in the PIRL the appropriate sample size for each program.

- Each year the State will review the sample size, taking into account previous years' DV results, potential data concerns and other relevant factors. Sample sizes are detailed in the **DV Procedural Documentation by Program Area** section, below.
- The universe of records sampled will be all participants for the previous ten quarters and will include both active and exited participants.
- All required data elements (per program) will be reviewed for each record sampled.
- Additional details are in each agency's processes towards the end of this document.

Error Identification and Tracking

- Each program will create and maintain a data validation checklist/tool for use by the individuals conducting DV.
- State DV staff will use the checklist/tool described above to verify:
 - That allowable source documentation exists*; and, where applicable, that the data in the participant record and the source documentation match.
- If/as errors are discovered, State DV staff will record relevant information on the checklist/tool.

*Note: A lack of allowable source documentation will result in an automatic error for the corresponding data element, and may result in additional follow-up, technical assistance, or other corrective action.

- The State will use documentation to track errors. Errors shall be recorded by data element, per program, per local area and/or AJC as appropriate.

The computational method for calculating error rates will be determined by:

- Dividing the number of errors (per element) by the number of files reviewed which contain that element, expressed as a percentage.
 - Example:
 - 200 participant files reviewed for "Date of Birth"; with 5 errors found;
 - $5/200 = 0.025$, or 2.5%
 - This process will be repeated for each data element.
- Each year after calendar year 2021, each program will use the previous year's DV results to determine error threshold rate(s) for the upcoming year.

- Error threshold rate(s) may fluctuate depending upon the *cause* of the error (e.g., a local AJC will not be held responsible if a State system/process is the cause of the error).
- In all cases, the actual error rate, and any actual or presumed reasons/causes for errors will be documented when errors exceed the error threshold rate.

Feedback and Error Correction

State DV staff will require local staff correct errors within 90 days of being notified of the error.

Training and Technical Assistance Identification and Provision

DV training will be provided for appropriate program staff annually.

Additionally, the feedback process will include engagement of program and local staff to ensure that they are advised of data elements and types of source documentation that had higher trends in errors, or other general data quality concerns identified, including:

- Technical assistance will be provided annually, as needed or requested, or both, typically within 90 days of the completion of State-level DV activities.
- Targeted or system-wide staff training will be considered after DV error rates or results are analyzed.

Data Validation Follow-up Activities

DV results are used to ensure the accuracy of local and state reports. Error rates and trends analysis will inform policy revisions and future sampling approaches.

If error correction is required and/or data or source documents are missing, State data validation staff will notify program coordinators (or providers, as appropriate) upon the completion of a program's data validation and source documentation review.

Individual programs governed by this framework will request follow-up documentation from their program coordinators detailing how DV process have been corrected and will set timelines for provider responses – typically within 90 days of notifying the coordinator as described in the previous paragraph.

Should a DV error rate or trend be identified, the State will provide assistance to program providers and AJC staff to implement system and/or policy changes to improve data quality.

All records and related documentation pertaining to DV will be compiled and maintained according to federal record retention requirements and be accessible to federal reviewers (2 CFR 200.334).

Records may include:

- Copies of worksheets on data elements and files/records reviewed
- Frozen quarterly wage records for wage record matching used for reporting outcomes
- Frozen/retained screen shots and documents displaying pre-correction data
- Trends in common data accuracy issues
- Error rate calculations

- Corrective action efforts made after data validation reviews
- Manner in which results are memorialized and records retained
- Document process for the correction of missing and erroneous data identified

In the event corrective action is required, those actions and expected outcomes will be tracked and monitored, in addition to any “typical” follow-up during DV activities (identifying promising practices, etc.).

Regular assessments of the effectiveness of the DV process will be conducted annually, typically in the 3rd calendar quarter, and will employ revisions to the policy and process, as needed, including:

- Method(s) for staff to assess the effectiveness of the DV process
- Frequency for how often this assessment occurs
- An assessment of the use of self-attestation as a form of source documentation
- An assessment of data collection accuracy through supplemental information gathering processes

Effectiveness assessments results may be used to design staff training and/or technical assistance sessions with a focus on potential process and data integrity improvements. Additionally, technical assistance may be requested at any time by State or local staff.

Results of the effectiveness assessments may also be incorporated into subsequent years’ pre-DV guidance and/or training materials.

DV Procedural Documentation by Program Area

Procedures for performing DV for each program is documented in 3 separate sections, Title I, Wagner-Peyser & JVSG, and TAA due to MIS and procedural differences.

Note: Since all ETA programs that are part of this data validation framework use the same source document list/requirements, if a participant is co-enrolled in more than one of the applicable programs, any program may accept the data validation results of another program’s DV procedure, as long as all “Program Specific Parameters” (see Attachment B) also apply.

Overview of Office of Workforce Investments (OWI) Processes

1. The Office of Workforce Investments (OWI) is responsible for Data Validation related to WIOA title I programs, including National Dislocated Worker Grants, and has program specific policies and guidance posted at www.wioainoregon.org
2. OWI will conduct Data Validation (DV) for WIOA title I programs at least annually, typically beginning in the 2nd calendar quarter.
3. Correcting errors and obtaining missing data or source documents will align with **Data Validation Follow-up Activities** (above).
4. In the event corrective action for local area staff is required, those actions will be documented and may be shared with appropriate leadership (Program coordinator, local WDB staff, chief local elected official, etc.).

5. Sample methodology and size: OWI will use random participant records gleaned from previous WIPS/PIRL submissions, and cross-reference them with participant names to create individual participant-specific worksheets.
 - a. OWI will typically select 10 customer records per program, per local area, for the WIOA T-I Adult, Dislocated Worker, and Youth programs (10 records x 3 programs x 9 local WDBs = 270 records). Additionally, if OWI administered any National DWGs during the Program Year for which data is being validated, OWI will typically select 10 DWG customer records for review and data validation.

Wagner-Peyser and JVSG DV Procedures

1. OED Data Validation staff will conduct DV of WP and JVSG records as outlined in the State DV Policy & Framework and will follow the processes outlined under the “Overview of Office of Workforce Investments (OWI) Processes” with the following exceptions:
 - a. Exclude item 5 and instead use sample sizes:
 - i. Wagner-Peyser will randomly select 25 records
 - ii. JVSG will randomly select 10 records

TAA DV Procedures

1. OED Data Validation staff will conduct DV of TAA records as outlined in the State DV Policy & Framework and will follow the processes outlined under the “Overview of Office of Workforce Investments (OWI) Processes” with the following exceptions:
 - b. Exclude item 5 and instead use sample sizes:
 - i. TAA will randomly select 25 records

Required Data Validation Elements and Source Docs

Required data validation elements and their corresponding source documents (by program) are included in Attachment B to this policy and framework, *DV Source Document Collection*.

Appendix D — Customer Satisfaction Survey Questions

Businesses

- As a result of the services you received, did you hire one or more new employee(s)?
- How satisfied were you with the person(s) you hired?
- If you have job openings in the future, how likely is it that you would list your job openings with us?
- How likely would you be to recommend our services to your fellow business owners?

Individuals

- How do you rate your first impression of the workforce system provider that served you?
- Do you feel the services provided helped (or will help) you find a job?
- If one of your best friends were looking for a job in the future, how likely would you be to recommend our services?

Appendix E — Research Division Articles, Surveys and Analysis

A Sample of Research articles by the Regional Analysis and Economic Analysis teams:

- [Oregon's Child Care Industry](#) by Jessica Nelson, June 2023
- [Oregon's Forestry and Logging Industry: From Planting to Harvest](#) by Brian Rooney, June 2023
- [Truck Drivers – The Way of the Road](#) by Dallas Fridley, May 2023
- [Difficult to Fill Job Openings in 2022](#) by Jessica Nelson, April 2023
- [In Multnomah County, Online Job Ads Increase 8% in 2022](#) by Jake Procino, April 2023
- [New and Emerging Jobs in Oregon: The Latest Trends](#) by Sarah Cunningham, April 2023
- [Job Vacancies in Northwest Oregon in 2022](#) by Erik Knoder, April 2023
- [Oregon's Commercial Fishing in 2022](#) by Erik Knoder, April 2023
- [50 Jobs That Pay Well . . . No College Necessary!](#) By Carlos Diaz, April 2023
- [Portland Metro Job Vacancies Reach Record High in 2022](#) by Amy Vander Vliet, April 2023
- [Full Jobs Recovery and Expansion in Oregon: 2022 Year in Review](#) by Gail Krumenauer, February 2023
- [10-Year Occupational Projections Show Recovery and Growth](#) by Sarah Cunningham, February 2023
- [Rebuilding the Pipeline: Supply and Demand in the Skilled Trades](#) by Henry Fields, September 2022
- [The Changing Face of the Nursing and Residential Care Industry](#) by Lynn Wallis, August 2022
- [Made in Oregon: A Profile of the State's Manufacturing Sector](#) by Molly Hendrickson, August 2022

Job Vacancy Survey – quarterly employer survey to gain insight into job vacancies by region, industry, occupation, education level, and wage level and provide information about jobs that are most difficult to fill:

- [Quarterly Job Vacancies Snapshots – Winter 2023](#), by Jessica Nelson, April 23, 2023
- [Top Occupations Oregon Employers Were Hiring in 2022 Job Vacancies](#) by Jessica Nelson, March 1, 2023
- [Oregon Job Vacancies: Hiring in 2022 Continued to Outpace Hiring Prior to the Pandemic](#) by Jessica Nelson, February 28, 2023
- [Quarterly Job Vacancies Snapshots – Summer 2022](#)
- [Quarterly Job Vacancies Snapshots – Spring 2022](#)

Wage Record Analysis – analysis of unemployment insurance wage records resulting in Oregonians @ Work publications:

- [Third Quarter 2022: Oregonians at Work – Real Wage Growth Faltered Amid Job Gains](#) by Molly Hendrickson, June 15, 2023
- [Second Quarter 2022: Oregonians at Work – Growing Wages and Increasing Jobs](#) by Molly Hendrickson, February 24, 2023
- [First Quarter 2022: Oregonians at Work – Increasing Jobs and Wage Growth by Sector](#) by Molly Hendrickson, November 2022
- [Oregonians at Work – Fourth Quarter 2021](#) by Gail Krumenauer and Molly Hendrickson, September 2022

Appendix F — Statewide Plant Closings and Layoffs

LWDB Area	Track #	Employer	City	Layoff Type	Layoff or Notification Date(s)	Industry Type
CWP	8458	Koida Greenhouse	Milwaukie	Permanent closure	12/20/2022	Wholesale Trade
CWP	8450	Lac St. Jack	Lake Oswego	Permanent closure	10/29/2022	Accommodation and Food Services
CWP	8449	Fills	Lake Oswego	Permanent closure	10/30/2022	Accommodation and Food Services
CWP	8443	Stanford's	Lake Oswego	Permanent closure	10/18/2022	Accommodation and Food Services
CWP	8442	Manzana Rotisserie Grill	Lake Oswego	Permanent closure	10/14/2022	Accommodation and Food Services
CWP	8441	Canteen	Lake Oswego	Permanent closure	10/14/2022	Accommodation and Food Services
CWP	8440	Beauty Systems Group, LLC	Clackamas	Permanent closure	12/16/2022	Warehousing & Mail/Package Delivery
CWP	8433	ICC NW	Canby	Large Layoff - 10 or more workers	10/10/2022	Manufacturing (Metals/Other)
CWP	8408	Crimson Trace	Wilsonville	Large Layoff - 10 or more workers	10/27/2022	Manufacturing (Metals/Other)
CWP	8401	Sabrozon Fresh Mexican Food	Lake Oswego	Permanent closure	7/26/2022	Accommodation and Food Services
CWP	8389	Center for Autism and Related Disorders, LLC	Wilsonville	Permanent closure	08/29/2022 08/15/2022	Health Care and Social Assistance
CWP	8380	Gustav's	Clackamas	Permanent closure	07/11/2022	Accommodation and Food Services
CWP	8349	Elephants Delicatessen	Lake Oswego	Permanent closure	02/18/2022	Accommodation and Food Services
CWP	8345	Carisbrook Technology Services, LLC	Wilsonville	Permanent closure	05/02/2022	Professional, Scientific, and Technical Services
CWP	8339	Renaissance Public Academy	Molalla	Permanent closure	06/10/2022	Educational Services
CWP	8331	Bunsenbrewer	Sandy	Permanent closure	10/25/2021	Accommodation and Food Services
ECW	8444	College EXPRESS	Bend	Permanent closure	10/18/2022	Educational Services
ECW	8436	Kramer's Market	Dufur	Permanent closure	10/06/2022	Retail Trade, Auto/Home/Food/Clothing
ECW	8423	Laird Super Food	Sisters	Permanent closure	12/12/2022	Manufacturing (Agriculture based)
ECW	8415	Hong Kong Restaurant	Bend	Permanent closure	8/16/2022	Accommodation and Food Services

ECW	8409	Volansi	Bend	Large Layoff - 10 or more workers	8/9/2022	Manufacturing (Metals/Other)
ECW	8400	Farm to Friends Country Market	Redmond	Permanent closure	7/26/2022	Agriculture, Forestry, Fishing and Hunting
ECW	8392	Center for Autism and Related Disorders, LLC.	Plano, TX	Permanent closure	7/11/2022	Health Care and Social Assistance
ECW	8386	Croutons	Bend	Permanent closure	6/21/2022	Accommodation and Food Services
ECW	8383	Simply Mac	Bend	Permanent closure	6/9/2022	Professional, Scientific, and Technical Services
ECW	8378	St. Charles	Bend	Large Layoff - 10 or more workers	05/20/2022	Health Care and Social Assistance
ECW	8358	Earth2o water	Culver	Permanent closure	3/21/2022	Manufacturing (Agriculture based)
ECW	8336	The Renewal Workshop	Cascade Locks	Permanent closure	02/04/2022	Manufacturing (Metals/Other)
EOWB	8467	Sears- Battendown, LLC	Ontario	Permanent closure	01/31/2023	Retail Trade, Auto/Home/Food/Clot hing
EOWB	8429	Bargain Center Ontario	Ontario	Permanent closure	09/20/2022	Retail Trade, Auto/Home/Food/Clot hing
EOWB	8422	Grain Craft	Pendleton	Large Layoff - 10 or more workers	8/10/2022	Manufacturing (Agriculture based)
EOWB	8375	Sears Hometown Store	La Grande	Permanent closure	06/23/2022	Retail Trade, Auto/Home/Food/Clot hing
EOWB	8348	Shearer's Foods	Hermiston	Large Layoff - 10 or more workers	02/22/2022	Manufacturing (Agriculture based)
EOWB	8338	Little Caesars	La Grande	Permanent closure	01/15/2022	Accommodation and Food Services
EOWB	8332	Campbell Tractor Company	Burns	Permanent closure	04/01/2022	Retail Trade, Auto/Home/Food/Clot hing
LWP	8434	Sizzle Pie	Eugene	Permanent closure	09/07/2022	Accommodation and Food Services
LWP	8432	Arcimoto	Eugene	Large Layoff - 10 or more workers	10/01/2022 10/01/2022	Manufacturing (Metals/Other)
LWP	8405	Center for Autism & Related Disorders	Eugene	Permanent closure	7/5/2022	Health Care and Social Assistance
LWP	8391	King Retail Solutions	Eugene	Large Layoff - 10 or more workers	7/8/2022	Manufacturing (Metals/Other)

LWP	8359	First Call Resolution	Veneta	Large Layoff - 10 or more workers	3/18/2022	Other Services (except Public Administration)
LWP	8346	Hoya Vision Care	Springfield	Permanent closure	03/31/2022	Professional, Scientific, and Technical Services
LWP	8343	Excelsior Inn Ristorante	Eugene	Permanent closure	2/16/2022	Accommodation and Food Services
LWP	8340	J H Baxter & Co	Eugene	Permanent closure	01/31/2022	Manufacturing (Wood/Chemical based)
NOW	8465	Lil Sambos	Lincoln City	Permanent closure	12/14/2022	Accommodation and Food Services
NOW	8463	Wireless Advocates	Seattle, WA	Permanent closure	12/14/2022	Information
NOW	8462	14th Street Cafe	Astoria	Permanent closure	12/15/2022	Accommodation and Food Services
NOW	8448	Builders First Source	Lincoln City	Large Layoff - 10 or more workers	10/10/2022	Construction
NOW	8447	Pegasus Games	Corvallis	Permanent closure	10/20/2022	Arts, Entertainment, and Recreation
NOW	8431	Susan's Garden and Coffee Shop	Corvallis	Permanent closure	9/26/2022	Accommodation and Food Services
NOW	8414	Sunset Presort	Astoria	Permanent closure	8/22/2022	Warehousing & Mail/Package Delivery
NOW	8413	Tumps Hobbies	Corvallis	Permanent closure	8/19/2022	Unclassified
NOW	8411	Ron and Trina's Place	Warrenton	Permanent closure	8/12/2022	Accommodation and Food Services
NOW	8385	Flood Valley Brewing	Warrenton	Large Layoff - 10 or more workers	6/13/2022	Accommodation and Food Services
NOW	8373	Lil' Sprouts Academy	Astoria	Permanent closure	06/30/2022	Accommodation and Food Services
NOW	8372	Corvallis Brewing Supply	Corvallis	Permanent closure	04/08/2022	Accommodation and Food Services
RWP	8453	Master Brand Cabinets, Inc (Grants Pass)	Grants Pass	Large Layoff - 10 or more workers	11/11/2022	Manufacturing (Wood/Chemical based)
RWP	8451	Rogue Karting	Medford	Permanent closure	11/13/2022	Arts, Entertainment, and Recreation
RWP	8412	Mann Lake Bee & Ag Supply (formally Shastina Millworks)	White City	Large Layoff - 10 or more workers	07/27/2022	Manufacturing (Wood/Chemical based)
RWP	8399	Halo Collective	Medford	Large Layoff - 10 or more workers	07/26/2022	Agriculture, Forestry, Fishing and Hunting
RWP	8397	Stone Coat Countertops	Grants Pass	Large Layoff - 10 or more workers	09/01/2022	Manufacturing (Metals/Other)

RWP	8396	Center for Autism and Related Disorders, LLC. - Medford	Medford	Large Layoff - 10 or more workers	08/29/2022	Health Care and Social Assistance
RWP	8395	RR Donnelley	Medford	Permanent closure	09/01/2022	Finance and Insurance
RWP	8333	Grants Pass Downs LLC dba Flying Lark	Grants Pass	Other	01/13/2022	Accommodation and Food Services
SOWIB	8461	Sears Hometown Store	North Bend	Permanent closure	12/05/2022	Retail Trade, Auto/Home/Food/Clothing
SOWIB	8355	Roseburg Forest Products	Roseburg	Large Layoff - 10 or more workers	3/29/2022	Manufacturing (Wood/Chemical based)
WWP	8468	Dallas Planing Mill- Fred Tebb and Sons	Dallas	Permanent closure	12/28/2022	Manufacturing (Wood/Chemical based)
WWP	8466	Marquis Spas	Independence	Large Layoff - 10 or more workers	12/09/2022	Manufacturing (Wood/Chemical based)
WWP	8459	Wireless Advocates	Albany	Permanent closure	12/5/2022	Retail Trade (Pet/Hobby/Office/Online)
WWP	8428	Oregon Mutual	McMinnville	Large Layoff - 10 or more workers	9/14/2022	Finance and Insurance
WWP	8403	Schwan's	Salem	Permanent closure	7/28/2022	Accommodation and Food Services
WSI	8425	Dennis Uniform	Portland	Large Layoff - 10 or more workers	11/01/2022	Retail Trade, Auto/Home/Food/Clothing
WSI	8419	Columbia Steel	Portland	Permanent closure	10/22/2022	Manufacturing (Metals/Other)
WSI	8418	Dr Martens	Portland	Permanent closure	8/18/2022	Warehousing & Mail/Package Delivery
WSI	8390	Moonstruck Chocolates	Portland	Permanent closure	7/5/2022	Retail Trade, Auto/Home/Food/Clothing
WSI	8379	Dr Martens	Portland	Permanent closure	09/01/2022	Retail Trade, Auto/Home/Food/Clothing
WSI	8353	Boyd Corporation	Portland	Permanent closure	04/01/2022	Manufacturing (Metals/Other)
WSI	8351	Modern Times Beer	Portland	Permanent closure	02/18/2022	Accommodation and Food Services

Appendix G — Success Stories

WIOA Youth Program

Promising practices employed by many Oregon youth programs focused on relationships and resource sharing. Building a strong base of community partners to assist in their unique ways to contribute to youth success at the local level. Sometimes those successful participants become a part of the community resources themselves.

Jonah

Participants such as Jonah, found motivation in his family's generational poverty to find a job on his own. Although it appeared to be a stable career, the pandemic was still affecting his employer and in a short time, they were unable to provide enough hours and had to lay Jonah off. Support systems were not available in Jonah's life, and he was unable to meet his basic needs. He heard of Phoenix Charter School through a former attendee. This organization is a WIOA youth service provider in Southern Oregon. The resources and supports provided to him by the program and his employment coaches allowed Jonah to begin a Work Experience in the Forestry Industry. Forestry is the lifeblood of Jonah's area and one that can offer livable wages. In addition to experience, Jonah was able to obtain safety and other certifications that will enhance his employability. When asked to describe how he feels about the job and skills he obtained, Jonah remarked *"I love being outside, working with my hands in nature, and knowing that this is the beginning of the career I will enjoy long term. Eventually I would like to be on the Wild Land fire crew or go into college to become a ranger for the national parks services."*

Donovan

Donovan was struggling to find meaningful employment while trying to complete his high school diploma. An intellectual disability added to the difficulty he faced. After a referral from his high school to the local WIOA Youth provider, Donovan was able to gain employability skills as well as knowledge on effective job search. Career exploration with his Employment Coach led to a training in bicycle tech, which fit his interests, skills, and abilities. Once he completed the training, Donovan was placed in a Work Experience as a bicycle mechanic at a local community resource center. Donovan's dedication and passion for helping others allowed the work experience to turn into a permanent position within the center's staff.

"I am happy that I was able to get some help so that I can go to work and start to live more independently. I like to be able to wake up and have something to do every day that I am good at. I like to people at the FRC because they made sure that I can find a job and that I can get my diploma someday soon. "

The meaning and success Donovan has found through this opportunity has also allowed him to focus on future goals.

"I want to be able to finish my school and then work for the Mission full time. Once I can get to go to Job Corps, I will be able to come back and maybe have my own shop someday."

SUCCESS FROM KLAMATH FALLS

Levi Osorio saw one of Business Services Representative, Kim Laugsand's Staff Assisted recruitments listed on Indeed. He shared that he applied and heard from WorkSource Klamath Falls the same day. Kim connected him with Hanson Tire for an interview the next morning where he got the job! He's now been working for Hanson Tire since March 7th and is loving the job, Levi states "I would highly recommend using WorkSource Klamath when looking for employment".

Owner of Hanson Tire, Brett Hanson emailed Kim to express his gratitude for connecting Levi- "Kim, I wanted to thank you for all your work, and follow up on finding me job applicants. You always do a great job for me and it is very appreciated. - Brett Hanson, Hanson Tire".

And THAT is Business Services- Support Business & Promote Employment.

Way to go Kim and Congratulations Levi!



#WeAreWorkSourceOregon



FOUR SUCCESSFUL HIRES AT THE CHRONICLE IN LANE COUNTY!

"Emerging from the first two years of the pandemic, we were in need of a variety of positions for our hyper-local news and information business. The team at WorkSource was invaluable: patient, informative and knowledgeable, and ultimately successful. They provided insights and support with job descriptions, helped phone screen candidates, and followed up at every stage of the process. WorkSource staffers not only offered great expertise in sourcing and hiring candidates, they demonstrated care and concern for me, our team, and our business"

-Noel Nash, Owner



WorkSource Lane successfully helped fill a Designer, two Journalists and a Copy Editor position so far this year.

worksource
OREGON

#WeAreWorkSourceOregon

OJT Success Story

December 2022

Ellen found out about the OJT Program from her employer, Threadbare Press, who had successfully used it before. She reports having an excellent experience in her new job gaining valuable skills that will help her advance. "I've learned the basics of screen printing (and that it takes years to be a master), how to use Printavo (screen printing organizational software), and how to efficiently purchase garments for print orders. These are all necessary to accelerate the craft. I was aware of Threadbare's awesome reputation and positive impact on the community before I interviewed for the job. I feel lucky to be a part of the team every day. This makes me happy to see programs that want to elevate companies like Threadbare."



Quote: "This job makes me feel more dignified than any previous job. I'm heard and valued. That's a big highlight after the mental toll of the past few years. While I've been challenged to learn new skills, I had so many that made landing in this position comfortable and welcoming. Because of the training I received, I can say with confidence that this job is a great fit.."





KAELAN MATTHEWS



" I am very thankful for the opportunity given to me by Worksource Oregon & Coursera to further develop my skills and education for career development. Gaining this Certification means another step in my career goals and I hope to gain new professional opportunities in the future."
-Kaelan Matthews"



Congratulations Kaelan on your new Certification!



We celebrated another Grow with Google Project Management Certificate graduate. Kaelan finished her certification in just under 2 months. Another great referral out of the WSO Gresham office, this one from Business & Employment Specialist, Jacob Rivas. Thanks, Jacob, for the great referral!

Want to refer some of your customers? Please refer to the [Staff Deskside reference](#) to identify your regional Grow with Google administrator and follow the 4 easy steps to make the referral and get them signed up!

STEP Success Stories

Meet Brandon (WorkSource Tigard)

Brandon was receiving unemployment insurance and SNAP benefits in Oregon but staying at his brother's house in Washington. Through a careful orientation to the STEP Program and the benefits of the "Peter Sutton Memorial Fund," Brandon knew that pursuing his Commercial Driver License was a great career move. Brandon carefully researched and chose the truck driving school that was right for him and his situation.

He started school at 160 Driving Academy in Clackamas during the month of April, 2022. STEP Coach Erin provided wrap around services while he was battling the elements during his training by providing excellent, individual career coaching, quality shoes and a warm sweatshirt/jacket.

As graduation from 160 Driving Academy approached, Brandon was referred to the next portion of the STEP Program. The next portion was the newly piloted STEP On-the-Job Training (OJT) Program. In the OJT Program, Brandon was introduced to Aaron Mowrer (Together Erin and Aaron for “Double Team Supreme”), who was developing relationships with local employers to help newly certified and qualified STEP participants break into their newly chosen industry.

Aaron assisted Brandon obtaining an OJT position with Oregon Trail Trucking LLC to develop a 4-week training plan with objectives and goals to ensure a smooth transition from training into employment. Aaron and Erin continually checked in with Brandon and the employer to see how things were going.

Brandon wrote the email below:

“I have a fantastic job that pays well and great people to work with/for. On average, I'm getting \$32.50 an hour, so that's a \$12.50 an hour jump in pay from my last job, and an 800% jump from what unemployment was paying!! I was worried about a career change and was close to backing out but the constant pushing you gave me to get the paperwork in and do what was needed left me no room to give up and I'm so happy and thankful that you did all you did for me.”

Meet James (WorkSource Salem)

My name is James, and it has been an absolute pleasure working with WorkSource Oregon. I was incarcerated for a period of 26 years, and when released, pretty darn scared about my future. Particularly as it relates to employment and gaining a clear understanding of what looking for work looks like in this day and age. A close friend suggested contacting WorkSource, and I just thought, “Why not...?” I did, and it’s been great.

As soon as I came into the office and sat down with the folks at WorkSource, I knew that I was in good hands. They were very friendly, welcoming, and incredibly encouraging to say the least. I went from being scared of the employment search to fired up in mere minutes. I was matched with a mentor/coach/employment specialist and working one-on-one with him as been amazing. He has given me tons of encouragement, helped me explore options based on my education and established work skills, and he’s just an incredible advocate for helping folks like me to get on our feet and headed in the right direction. It’s been a joy working with him, and the other wonderful people there as well.

I’ve learned valuable tools while partnering with WorkSource; resume building, networking, finding the strength and courage to ask for help and realizing that it’s right there.

I’ve learned how to apply for State jobs, submit my resume to various employment agencies, and basically jump neck deep into the job searching field...and again, all after spending decades behind the walls of a penitentiary and fearing what the job search world looks like nowadays. I was in good hands.

Things are going well for me. I’ve secured not one, but two jobs that I’m enjoying tremendously. I’ve learned that employers are actively seeking to hire, and that when you show up with a good attitude and a willingness to jump right in things just have a way of working out in a positive way.

One of the main things that WorkSource helped me with was securing a laptop. They have a digital immersion program that helps with job searching, and the laptop they provided was a Godsend. I had never had one before, and it felt like Christmas when they provided me with such a nice piece of equipment (and carrying bag to keep it safe I might add). They then went out of their way to help me learn about options that allowed me to secure low-cost internet service on top of everything else. Wow.

If you're in a spot, and you need help, and you're willing to be your own best advocate...well, WorkSource Oregon will get behind you and help you attain your goals. Don't ever give up. Just give them a call. Hey... Why not...?

Meet Kendra (WorkSource Bend)

Kendra was referred to STEP after an RESEA appointment in June 2022. She was recently laid off from St. Charles Medical Center, after only working there four days. Kendra was interested in pursuing office work and improving her skills in Excel and Access, so I referred her to the free Gale courses through the Deschutes Library. She enrolled in both courses immediately and continued to work hard at securing full-time employment. By July, she was hired for an Accounts Receivable/Payable position at SEND Transportation earning \$45,000 annually.

She was so grateful to get back on her feet. Since Kendra did not have the finances to purchase new work clothing, the STEP program was able to assist. She relayed that the new work clothing provided by the STEP program helped her feel more confident in her new role at SEND. The STEP program also assisted with fuel and cell phone bill support to help her maintain employment.

Kendra is a single mother of three and continued to struggle financially during her first few months of employment. This is when STEP was able to assist with housing, utility bill and auto insurance support for two months. Kendra continuously expressed her gratitude for the support that STEP has been able to provide and she is so happy with her employment at SEND, that she plans to work there long-term. The company is expanding and she has observed that some staff have been promoted recently, which encourages her to pursue a promotion as a Logistician in the near future, which will help her expand her knowledge and skills to become a greater asset to the company.

Kendra's livable wages have reduced her SNAP benefits to \$0 and because of the support of the STEP program, she feels confident in reaching a point of self-sufficiency.

Trade Act Success Stories



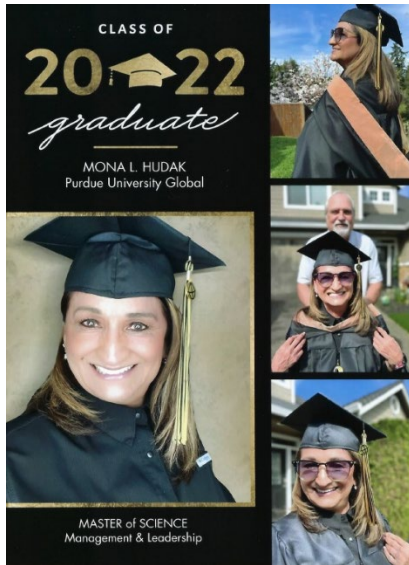
Zach Snyder - When my company announced they were moving out of the country, I didn't want to admit how difficult the change could be. It is hard to lose your job and admit you have to make a change.

I knew I was capable, but there were not any roles fitting my experience. The future looked dark, offering less pay and little security.

The Trade Act offered me something else. A chance to retrain, to find a job in a field where jobs were in demand. To get there meant I would have to spend a lot of time in school. Even knowing it's the best choice, it is a lot to commit to months or years of learning. That is especially true when most of your working years are already behind you.

Two years later, imagining I ever had those worries is hard. The school was great; it opened my mind to new possibilities. I'm in a new field. Jobs are in high demand. The work is interesting and engaging. It has not been easy, but it is rewarding.

Friends tell me they are impressed I made a career change, that they cannot imagine doing it themselves. On this side of that change, I know I made the easy choice. Staying in my old job field would have been the harder choice. I just didn't know it then.



Mona Hudak - It's been nearly 7 months since my 2022 graduation from Purdue University Global. I wanted to take this time to reflect on the challenges, the support and the ultimate glow I have now. Completing my master's degree has long been a goal but life gets in the way sometimes.

In 2020, I was made aware that this degree path was available to me and it would be managed by the Oregon Employment Department as part of the Trade Act program. I was determined to see this through. With the help of my Trade Act Case Manager, who really took ownership of my path, I was able to visualize success. This path didn't come without challenges in selecting and getting approval to attend the program I chose, but my TAA case manager stepped in to provide me answers and then support all along the way. This meant she managed the tuition, the program required textbooks and any other obstacles that appeared. With my TAA case manager managing the logistics of the program, this freed me to concentrate on my academics. I am proud to say that I graduated with a 4.0 GPA.

This program and my ultimate graduation has allowed me to represent higher education on my resume and in my contributions. I have a role at a global, high-tech organization where I am participating in valuable, impactful programs as a Business Development Manager. I have no doubt that my leadership and management skills gained through the Trade Act Program, will continue to serve me.

Many, many thanks for the support of the State of Oregon and to my Trade Act Case Manager.



My nombre es Lidia Ocampo - Yo estuve trabajando por 7 años, en una empackadora, donde ganaba un poco más que el mínimo. Al principio estaba empackando por 2 años, era un trabajo muy cansado que al final del día salía muy cansada. Después me cambié de posición que fue en Control de Calidad (QC) y pues en esta posición ganaba un poco más y era menos trabajo físico pero tenía más responsabilidades. Hasta que la compañía cerró y me quedé sin trabajo. Estuve en el desempleo por 3 años. Durante este tiempo tuve la oportunidad de obtener mi GED en

Chemeketa Community College, después estuve en el programa de TRADE ACT ellos me apoyaron en mis clases de inglés y también obtuve mi certificado de Certified Nurse Aide (CNA). Gracias a este apoyo que el programa de TRADE ACT me dio ahora tengo un trabajo mejor y una paga mejor. Estoy muy contenta porque me pude preparar para tener una profesión y un mejor trabajo, ahora puedo decir que me siento realizada gracias a TRADE ACT.

Translation:

"My name is Lidia Ocampo

I was working for 7 years, in a packing warehouse, where I earned a little more than the minimum wage. At the beginning I was packing for 2 years; it was a very tiring job that at the end of the day I left very tired. Later I changed my position, which was in Quality Control (QC) and well, in this position I earned a little more and it was less physical work, but I had more responsibilities. When the company closed, I was out of a job. I was unemployed for 3 years. During this time, I had the opportunity to obtain my GED at Chemeketa Community College, later I was in the TRADE ACT program they supported me in my English classes, and I also obtained my Certified Nurse Aide certificate. (CNA). Thanks to this support that the TRADE ACT program gave me, I now have a better job and better pay. I am very happy because I was able to prepare myself to have a profession and a better job, now I can say that I feel fulfilled thanks to TRADE ACT."



Alejandro Dominguez-Alvarez - When the timber mill closed its doors, I did what I could to take care of my family. Right away I found a job in a furniture store, getting paid minimum wage, which forced me to take side jobs to make ends meet.

For several years life was difficult. One day after I hit rock bottom, I decided to go to WorkSource to find a better job. In the initial interview the work source representative informed me that I had retraining benefits on my account that I could use to get a better job from back when the timber mill was shut down. This was one of the best news I had received. I knew then that things would get better.

Soon after the initial interview I was assigned to a TAA case worker. The TAA case manager was extremely helpful she made a complex process easy to follow. Once I was part of the retraining program my classes were covered by Trade Act and money that I would obtain from scholarships and working on the side were exclusively to pay my bills. Additional TAA staff were also there to support me during my training.

The Trade Act program has given me the opportunity to reach my goal of becoming a surgical nurse. I completed the Nursing program through Southwestern Oregon Community College and studied hard to pass my NCLEX certification to obtain my Registered Nursing license. Today I got an offer to work in the Operating Room (OR) where I did my practicum. I can proudly say now that I have a career not just a job. I thank everyone that was there to support me when I needed them the most, this would not have been possible without programs like this.

Veteran Success Story

Kevin, a U.S. Army Veteran, spent several months searching for work and trying different employment options since transition out of the military. He connected with the Disabled Veterans’ Outreach Program Specialist (DVOP) through a community partner. Kevin qualified for DVOP employment services from having a 100% service-connected disability. The DVOP reviewed his job search materials and determined that Kevin would benefit from job placement services through the local WSO Business Services Team. The DVOP connected him with business services, and he was referred to an employer for an On-the-Job Training opportunity. The employer was impressed with his work ethic and skills. They decided to offer him a job as a delivery driver (making \$28.00 per hour) with extra training to become their Service Manager within a few months based on his military leadership skills. Kevin was extremely grateful for all the support he received from WSO and the one-on-one assistance he received from the DVOP.

Appendix H — Quality Feedback Measures Outcomes

This chart compares QFM Job Seeker review criteria for program years 2021 and 2022.

Job Seeker Review Criteria	PY 2021	PY 2022
Occupations Reflect Work History & Educ.	65%	70%
Profile Complete for Job Matching	63%	67%
Tracking Notes Meet Agency Standards	95%	98%
Career & Training Goals Noted	74%	85%
Next Step(s) Assigned	84%	81%

This chart compares QFM Job Listing criteria for program years 2021 and 2022.

Job Listing Review Criteria	PY 2021	PY 2022
Job Classification Correct	94%	97%
Oregon Tax ID Number Current	96%	98%
Legal Requirements (EEO/ADA)	95%	95%
Job Info. & Contact Details Complete	95%	94%
Tracking Notes Meet Agency Standards	97%	98%
Potential Issues Referred to UI	98%	98%
Requirements Clear & Appropriate to Position	93%	94%
Staff Referrals Meet Job Requirements	90%	95%
Timely First Contact w/Employer	87%	88%
Referral & Recruitment Feedback Provided	75%	76%

Job Seeker services experienced a significant improvement in Career and Training goal criteria this year versus last year. Occupation and Profiles continue to struggle in meeting the standards. The recent changes in instructions and processes

should improve these results in PY 2023. **Job Listing reviews** have been consistently performing better and have achieved better results in 6 out of the 10 criteria that they are measured on.

Appendix I — STEP Placement Information by Industry (PY 2022)

Industry	Placements	% of Total
Industry Not Documented by Staff	1,368	46.6%
Health Care and Social Assistance	296	10.1%
Transportation and Warehousing	243	8.3%
Retail Trade	202	6.9%
Accommodation and Food Services	198	6.7%
Manufacturing	139	4.7%
Construction	95	3.2%
Other Services, Except Public Admin.	95	3.2%
Agriculture, Forestry, Fishing, Hunting	66	2.2%
Educational Services	45	1.5%
Professional, Scientific, Technical Services	42	1.4%
Admin, Support, Waste Management, Remediation Services	32	1.1%
Public Administration	25	0.9%
Arts, Entertainment, and Recreation	24	0.8%
Finance and Insurance	21	0.7%
Utilities	11	0.4%
Unclassified Establishments	9	0.3%
Information	7	0.2%
Real Estate and Rental and Leasing	7	0.2%
Wholesale Trade	7	0.2%
Management of Companies	2	0.1%

Appendix J — STEP Participants by Underserved Populations (PY 2022)

Historically and Currently Underserved Populations served by the STEP Program	Total Customers Served July 2022 – June 2023
	7,616
African American	434
American Indian or Alaskan	232
Asian	112
Disability	1,579
Female	3,668
Homeless	1,373
Hispanic Ethnicity	1,133
More than one race	683
Migrant-Seasonal Farmworker	301
Native Hawaiian or Pacific Islander	40
Non-US Citizenship	200
Single-Parent Household	2,824

Appendix K — Co-Enrollment Workgroup Work Session

CO-ENROLLMENT WORKGROUP
 WORK SESSION May 3-4, 2023
 Broadway Commons, Salem Oregon



The Co-Enrollment Workgroup established by the Trade Adjustment Assistance (TAA) Program for Workers, Oregon Employment Department and the Office of Workforce Investments, Higher Education Coordinating Commission in response to Oregon receiving a Finding from the DOL ETA regarding the Co-Enrollment performance requirement.

The Co-Enrollment Workgroup members were facilitated through the 34 points listed in the Dislocated Worker Customer Timeline Discussion Points, starting from the point at which a TAA petition is filed through providing a Rapid Response Information Session for Workers, the Welcome Process, WSO Career Services and DW Services for Workers to when a TAA Petition is Certified for Workers and finished with Co-Enrollment Activities and Exit and Follow Up Services for Workers

First Discussion: Each of the 34 points were reviewed to understand if there was agreement on what the intent of the point was and if there were problems, issues, disagreements, or unfinished work on the how, who or why.

Second Discussion: Each of the points in which there was disagreement were revisited in order to identify further the cause of the disagreement and the issues that need to be resolved.

Third Discussion: Each of the points in which there was disagreement were revisited in order to identify what questions or technical assistance the workgroup would ask or request from DOL. Also identified were which points should go to which groups for next steps in resolving the points in which there are disagreements in order to increase the number of workers served by co-enrollment in both the Trade Act and Title I Dislocated Worker program.

Result of the Discussions:

- Notes on Dislocated Worker Customer Timeline Discussion Points identifying agreements or the cause of the disagreement(s) and issues that need to be resolved.
- Questions to ask DOL during the technical assistance session with DOL the second day.
- Identified which group(s) need to provide follow up and address the identified cause of the disagreement(s) and work to resolve any issues for each of the Dislocated Worker Customer Timeline Discussion Points

Rapid Response Workgroup(s)	Co-Enrollment Data Workgroup	Office of Workforce Investments	Oregon Workforce Partnership Compliance Group	Co-Enrollment Workgroup
2	4	30	9	5
4	5	31	33	6
7	6	33	34	7
16	8	34		8
	10			9
	11			16
	22			18
	23			19
	33			20
				21
				25
				26
				28
				29
				30

Rapid Response Workgroup(s)	Co-Enrollment Data Workgroup	Office of Workforce Investments	Oregon Workforce Partnership Compliance Group	Co-Enrollment Workgroup
				31
				32
				34

Next Steps:

- Specific groups will start work to address the identified cause of the disagreement and work to resolve any issues for each of the identified Dislocated Worker Customer Timeline Discussion Points.
- Trade Act staff and OWI will collaborate on the next in-person Co-Enrollment Workgroup and a new Case Management work sessions.

Appendix L — Co-Enrollment and Rapid Response Information Session Attendance

**Table 1 - Customer Co-Enrollment in both WIOA Dislocated Worker and Trade Act programs & Customer Rapid Response Information Session Attendance for Trade Certified Workers
Date Range: First Quarter 2023 PIRL**

Local Workforce Development Board	Number of Workers Completed Trade Act Eligibility	Number Received RRIS of Workers Completed Trade Act Eligibility (WIOA DW documented)	Percent Received RRIS of Workers Completed Trade Eligibility (WIOA DW documented) (Target 100%)	Co-Enrollment Number of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program	Number Declining WIOA DW Services of Workers Completed Trade Eligibility (WIOA DW documented)	Co-Enrollment Percent of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program (Target 100%)
Statewide	179	143	79.89%	29	Unknown	16.20%
Clackamas Workforce Partnership	17	10	58.82%	1	Unknown	10.00%
East Cascades Works	27	19	70.37%	6	Unknown	22.22%
Eastern Oregon Workforce Board	5	5	100.00%	0	Unknown	0.00%
Lane Workforce Partnership	17	12	70.59%	4	Unknown	23.53%
Northwest Oregon Works	3	1	33.33%	0	Unknown	0.00%
Rogue Workforce Partnership	9	5	55.56%	6	Unknown	66.67%
Southwestern Oregon Workforce Investment Board	19	18	94.74%	1	Unknown	5.26%
Willamette Workforce Partnership	40	31	77.50%	5	Unknown	12.50%

Local Workforce Development Board	Number of Workers Completed Trade Act Eligibility	Number Received RRIS of Workers Completed Trade Act Eligibility (WIOA DW documented)	Percent Received RRIS of Workers Completed Trade Eligibility (WIOA DW documented) (Target 100%)	Co-Enrollment Number of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program	Number Declining WIOA DW Services of Workers Completed Trade Eligibility (WIOA DW documented)	Co-Enrollment Percent of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program (Target 100%)
Worksystems	50	34	68.00%	6	Unknown	12.00%

Table 1

**Table 2 - Customer Co-Enrollment in both WIOA Dislocated Worker and Trade Act programs & Customer Rapid Response Information Session Attendance for Trade Certified Workers
Date Range: Fourth Quarter 2022 PIRL**

Local Workforce Development Board	Number of Workers Completed Trade Act Eligibility	Number Received RRIS of Workers Completed Trade Act Eligibility (WIOA DW documented)	Percent Received RRIS of Workers Completed Trade Eligibility (WIOA DW documented) (Target 100%)	Co-Enrollment Number of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program	Number Declining WIOA DW Services of Workers Completed Trade Eligibility (WIOA DW documented)	Co-Enrollment Percent of Workers Completed Trade Eligibility also enrolled in WIOA Dislocated Worker Program (Target 100%)
Statewide	165	142	86.06%	17	Unknown	10.30%
Clackamas Workforce Partnership	17	14	82.35%	2	Unknown	11.76%
East Cascades Works	12	10	83.33%	3	Unknown	25.00%
Eastern Oregon Workforce Board	5	4	80.00%	1	Unknown	20.00%
Lane Workforce Partnership	13	9	69.23%	2	Unknown	15.38%
Northwest Oregon Works	5	5	100.00%	0	Unknown	0.00%
Rogue Workforce Partnership	5	3	60.00%	2	Unknown	40.00%
Southwestern Oregon Workforce Investment Board	28	27	96.42%	1	Unknown	3.57%
Willamette Workforce Partnership	33	27	81.82%	4	Unknown	12.12%
Worksystems	44	34	77.27%	2	Unknown	4.55%

Table 2

For an individual to be co-enrolled, he or she needs to be a participant in both the Trade Act and the WIOA Dislocated Worker programs. Co-Enrollment with the WIOA Dislocated Worker program is measured in the TAADI.

Co-Enrollment and TAA Data Integrity (TAADI)

- The TAADI measures co-enrollment when the following conditions are met:
- The reported values are either 1 (Yes, Local Formula), 2 (Yes, Statewide), or 3 (Yes, Both Local Formula and Statewide) for Dislocated Worker **(PIRL 904)**;
- Either the Date of Most Recent Career Service **(PIRL 1004)** is populated, or Date Entered Training #1 **(PIRL 1302)** is prior to Date of First TAA Benefit or Service **(PIRL 925)**; and
- Records with Date of First TAA Benefit or Service **(PIRL 925)** within the most recent 4 report quarters

Appendix M — Dislocated Worker Customer Timeline Discussion Points

The Co-enrollment Workgroup has been established due to Oregon receiving a Finding from the DOL ETA regarding the Co-enrollment performance requirement. The Dislocated Worker Customer Timeline Discussion Points document is meant to be a starting point. The OED and OWI leadership want to have a better understanding regarding the dislocated worker customer timeline points in which we all agree and what are the points of non-agreement. The leadership decided to provide workgroup members with time to review this starting point information and come prepared to the workgroup meeting ready to identify the points on the document or references in which you agree or your reasons for non-agreement.

<i>TAA Petition Filed for Worker Group</i>	<i>Rapid Response Information Session for Workers</i>	<i>Welcome Process, WSO Career Services and DW Services for Workers</i>
<p>1. TAA Petition Coordinator notifies TAA, OWI DWU & appropriate Local board staff and identified WSO staff and partners</p>	<p>2. Local Rapid Response Coordinator works with employer to identify the list of affected workers</p> <p>3. Local Rapid Response Coordinator coordinates a Rapid Response Information Session (RRIS) for the workers covered by the TAA petition and includes a TAA presentation by the TAA Navigator</p> <p>4. Local Rapid response Coordinator tracks and shares RRIS attendance data with TAA</p>	<p>5. WIOA Title 1 Service Provider Staff provide access to the Welcome process with RRIS attendees</p> <p>6. WIOA Title 1 Service Provider Staff provide access to WSO services and the Welcome process with affected workers who did not attend RRIS</p> <p>7. WSO provides Outreach to Laid Off Dislocated Worker covered by the TAA Petition who did not attend the RRIS</p> <p>8. WSO staff make available all Basic and Individualized Career Services if determined to be appropriate in order for a Dislocated Worker covered by a TAA petition to obtain or retain employment</p> <p>9. WIOA Title 1 Service Provider staff enroll DW Eligible Affected Workers when a qualifying service is provided</p> <p>10. At the time of enrollment, WIOA Title 1 Service Provider Staff reports in the state MIS system if the dislocated worker received Rapid Response services prior to enrollment</p> <p>11. If the Dislocated Worker declines DW services, WIOA Title 1 Service Provider Staff reports the refusal in the state MIS system</p> <p>12. WIOA Title 1 Service Provider staff provide career & training services, as appropriate, to enrolled DWs</p>

TAA Petition Certified for Workers	CO-Enrollment Activities	Exit and Follow Up Services for Worker
<p>13. TAA Petition Coordinator notifies TAA, OWI DWU & appropriate Local board staff and identified WSO staff and partners</p> <p>14. Trade Act Navigators coordinate Trade Act information Session (TAAIS)</p> <p>15. Trade Act Navigators coordinate with local Rapid Response Coordinators to schedule RRIS</p> <p>16. WSO provides outreach to TAA enrolled workers who did not attend the RRIS</p> <p>17. TAA staff complete TAA initial assessments and TAA enrollment</p> <p>18. WSO and WIOA Title 1 Service Provider Staff work together to identify TAA enrolled workers who have not yet enrolled in, or have already exited, the DW program, and provide outreach with the ultimate goal of serving the customer and explain the benefits to reengaging with WIOA at this time in conjunction with TAA program with enrollment in the DW program</p> <p>19. WIOA Title 1 Service Provider Staff provides access to WSO services and the Welcome process with TAA enrolled workers not enrolled in WIOA DW program</p> <p>20. WSO staff make available all Basic and Individualized Career Services if determined to be appropriate in order for a Dislocated Worker covered by TAA petition to obtain or retain employment</p> <p>21. WIOA Title 1 Service Provider Staff enroll DW Eligible Trade Affected Workers when a qualifying service is provided</p> <p>22. At the time of enrollment, WIOA Title 1 Service Provider Staff reports in the state MIS system if the dislocated worker received Rapid Response services prior to enrollment</p> <p>23. If the dislocated worker declines DW services, WIOA Title 1 Service Provider Staff reports the refusal in the state MIS system and shares with TAA Case Manager</p> <p>24. WIOA Title 1 Service Provider Staff provide career & training services, as appropriate, to enrolled DWs</p>	<p>25. As outlines in the Trade Act IEP requirements, TAA staff review current services provided to customers and assess potential IEP changes including any services that will be needed by the worker to obtain suitable employment, including career services, supportive services through WIOA DW, and post-training case management services and these must be discussed with the customer and included in the IEP if needed</p> <p>26. WIOA Title 1 Service Provider Staff & TAA Staff meet to share assessments, Individual Employment Plan (IEP), if already created by DW program, and other information about co-enrolled customer</p> <p>27. If WIOA DW program already created customer's IEP, the current IEP information is used to supplement the TAA IEP. TAA will modify customer's training plan to allow for additional training under TAA program</p> <p>28. WIOA Title 1 Service Provider Staff & TAA staff meet with co-enrolled customer to explain how WIOA DW and TAA work together and to create or edit IEP</p> <p>29. If the local DW program has not adopted the six criteria for the approval of training under Trade, the TAA staff must ensure the six criteria for the approval of training under Trade, are used for determining the appropriateness of training</p> <p>30. As appropriate, WIOA Title 1 Service Provider Staff & TAA staff coordinate to move payment for training from WIOA DW to TAA</p> <p>31. WIOA Title 1 Service Provider Staff & TAA staff coordinate payments for training and services to comply with Federal laws, rules and regulations</p> <p>32. WIOA Title 1 Service Provider Staff & TAA staff each maintains proper documentation</p>	<p>33. The common exit date is calculated, when the 90-days has elapsed with no qualifying services from any of the programs in which the customer is enrolled</p> <p>34. WIOA Title 1 Service Provider Staff provide follow-up services to participants after exit and share information & documentation, as appropriate, with TAA staff</p>

Appendix N — Trade Adjustment Assistance Occupational Skills Assessment Form

Trade Adjustment Assistance (TAA) On-The-Job Training (OJT) Occupational Skills Assessment



Purpose

The goal of this form is to see if the participant's skills match the requirements of the job and identify areas where they need additional training. This will help create a training plan to help them gain the knowledge and skills needed to do the job.

Instructions

This form gathers information from both the employer and the participant.

A Trade Act representative will prefill this form with information specific to the occupation title using [O*NET](http://onetonline.org) (onetonline.org) which is sponsored by the U.S. Department of Labor.

Participant section:

The **participant section** contains blue columns of yes/no boxes and has two areas to complete. These sections will show what skills the participant has that match the job, as well as any areas where they may need more training.

Employer section:

The **employer sections** are green and have two areas to complete.

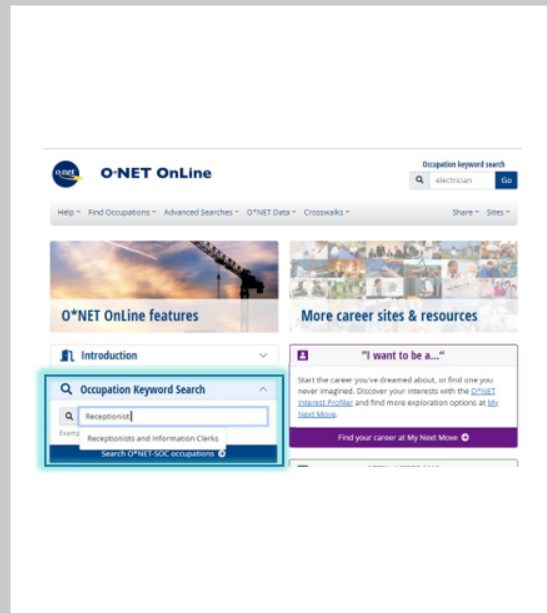
Employer section 1: This identifies which skills clusters are needed for the job that the employer is hiring for. [O*NET](http://onetonline.org) identifies these skills as specific to this occupation and other closely related occupations.

Employer section 2: The agency recognizes business needs vary, therefore, employers may have a need for specific skills which can be added to the OJT training plan. This section provides an opportunity for the employer to add additional, unique, "employer specific skills" that are not listed in section 1.

Go to ONET:
<https://www.onetonline.org/>

“Occupation Keyword Search”

Enter the ONET code or the occupation title.



All the white sections of Occupational Skills Assessment form need to be completed by a Trade Act representative.

Receptionists and Information Clerks ←
 43-4171.00 ←

Bright Outlook Updated 2022

Answer inquiries and provide information to the general public, customers, visitors, and other interested parties regarding activities conducted at establishment and location of departments, offices, and employees within the organization.

Job Zone

Title Job Zone Two: Some Preparation Needed

Education These occupations usually require a high school diploma.

Related Experience Some previous work-related skill, knowledge, or experience is usually needed. For example, a teller would benefit from experience working directly with the public.

Job Training Employees in these occupations need anywhere from a few months to one year of working with experienced employees. A recognized apprenticeship program may be associated with these occupations.

Job Zone Examples These occupations often involve using your knowledge and skills to help others. Examples include orderlies, counter and rental clerks, customer service representatives, security guards, upholsterers, tellers, and dental laboratory technicians.

SVP Range ← 3 months to 1 year of preparation (4.0 to < 6.0)

Trade Adjustment Assistance (TAA) Occupational Skills Assessment worksource OREGON

Participant Name:	Date:
Occupation Title: Receptionists and Information Clerks ←	ONET Code: 43-4171.00 ←
Estimated Training Duration for this specific occupation (Based on ONET (SVP) Range): 3 months to 1 year of preparation (4.0 to < 6.0)	

Tasks

- Are specific work activities that are unique to the occupation
- Tasks will be used to identify the compatible skills and the skills gap

Tasks

^ All 19 displayed

- Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.
- Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.
- Schedule appointments and maintain and update appointment calendars.
- Hear and resolve complaints from customers or the public.
- File and maintain records.
- Receive payment and record receipts for services.
- Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.
- Transmit information or documents to customers, using computer, mail, or facsimile machine.
- Analyze data to determine answers to questions from customers or members of the public.
- Collect, sort, distribute, or prepare mail, messages, or courier deliveries.
- Provide information about establishment, such as location of departments or offices, employees within the organization, or services provided.
- Calculate and quote rates for tours, stocks, insurance policies, or other products or services.
- Process and prepare memos, correspondence, travel vouchers, or other documents.
- Keep a current record of staff members' whereabouts and availability.
- Take orders for merchandise or materials and send them to the proper departments to be filled.
- Perform duties, such as taking care of plants or straightening magazines to maintain lobby or reception area.
- Schedule space or equipment for special programs and prepare lists of participants.
- Enroll individuals to participate in programs and notify them of their acceptance.
- Conduct tours or deliver talks describing features of public facilities, such as a historic site or national park.

Copy each cluster of tasks from ONET and paste them into the Occupational Skills Assessment

Tasks

^ All 19 displayed

- Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.
- Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.
- Schedule appointments and maintain and update appointment calendars.
- Hear and resolve complaints from customers or the public.
- File and maintain records.
- Receive payment and record receipts for services.
- Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.
- Transmit information or documents to customers, using computer, mail, or facsimile machine.
- Analyze data to determine answers to questions from customers or members of the public.
- Collect, sort, distribute, or prepare mail, messages, or courier deliveries.
- Provide information about establishment, such as location of departments or offices, employees within the organization, or services provided.
- Calculate and quote rates for tours, stocks, insurance policies, or other products or services.
- Process and prepare memos, correspondence, travel vouchers, or other documents.
- Keep a current record of staff members' whereabouts and availability.
- Take orders for merchandise or materials and send them to the proper departments to be filled.
- Perform duties, such as taking care of plants or straightening magazines to maintain lobby or reception area.

Occupation-specific information

Participant Section: 1

Employer Section: 1

Tasks

Copy and paste "tasks" from O*NET (onetonline.org) for this occupation into this section.

Occupation-specific information	Participant Section: 1	Employer Section: 1
Tasks	Yes, you have all the skills in the cluster. No, you have some or none of the skills in the cluster.	Select the skills clusters required for the OJT position.
Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Schedule appointments and maintain and update appointment calendars.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Hear and resolve complaints from customers or the public.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
File and maintain records.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Receive payment and record receipts for services.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>

The **Employer Sections** are green with two areas that need to be completed.

- **Section 1:** Select the skills clusters required for the OJT position. Identifies which skills clusters are required for the position the employer is recruiting for.
- **Section 2:** Allows the employer to add “Employer Specific Skills” required for the OJT position. These “employer specific skills” are not reflected in Section 1.

Occupation-specific information	Participant Section: 1	Employer Section: 1
<p>Tasks</p> <p>Copy and paste “tasks” from O*NET (onetonline.org) for this occupation into this section.</p>	<p>Yes, you have all the skills in the cluster.</p> <p>No, you have some or none of the skills in the cluster.</p>	<p>Select the skills clusters required for the OJT position.</p>
Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Schedule appointments and maintain and update appointment calendars.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Hear and resolve complaints from customers or the public.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
File and maintain records.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Receive payment and record receipts for services.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>

Employer Section: 2	Participant Section: 2
Company Name:	Date:
Contact:	Phone:
Employer specific skills not listed in the “tasks” section above	
Purchase office supplies and equipment and reconcile credit card monthly.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Make travel arrangements for senior managers, issue advances for meals and other expenses; book conference rooms, taxis, couriers, hotels, etc.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Handle sensitive information in a confidential manner.	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No

The **Participant Section** is the blue columns of yes/no boxes with two areas to complete.

- “**Yes**” the participant has **all** the skills in the cluster.
- “**No**” the participant has **some or none** of the skills in the cluster.

Tasks	Participant Section: 1	Employer Section: 1
<p>Copy and paste “tasks” from O*NET (onetonline.org) for this occupation into this section.</p>	<p>Yes, you have all the skills in the cluster.</p> <p>No, you have some or none of the skills in the cluster.</p>	<p>Select the skills clusters required for the OJT position.</p>
Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Schedule appointments and maintain and update appointment calendars.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Hear and resolve complaints from customers or the public.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/>
File and maintain records.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Receive payment and record receipts for services.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>

Employer Section: 2	Participant Section: 2
Company Name:	Date:
Contact:	Phone:
Employer specific skills not listed in the “tasks” section above	
Purchase office supplies and equipment and reconcile credit card monthly.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Make travel arrangements for senior managers, issue advances for meals and other expenses; book conference rooms, taxis, couriers, hotels, etc.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Handle sensitive information in a confidential manner.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No
	<input type="checkbox"/> Yes <input type="checkbox"/> No

- Compatible skills: needed to meet the approval [criteria](#)
- Participant has the [skills](#) but the employer does not require it; not a compatible skill or a skill gap
- The participant does not have the skill and the employer does not require it

Occupation-specific information	Participant Section: 1	Employer Section: 1
<p>Tasks</p> <p>Copy and paste "tasks" from O*NET (onetonline.org) for this occupation into this section.</p>	<p>Yes, you have all the skills in the cluster. No, you have some or none of the skills in the cluster.</p>	<p>Select the skills clusters required for the OJT position.</p>
Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Schedule appointments and maintain and update appointment calendars.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Hear and resolve complaints from customers or the public.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/>
File and maintain records.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Receive payment and record receipts for services.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/>
Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/>

These clusters identify the skills gap and will be added to the:

- OJT Contract and Monthly Progress Report

Occupation-specific information	Participant Section: 1	Employer Section: 1
<p>Tasks</p> <p>Copy and paste "tasks" from O*NET (onetonline.org) for this occupation into this section.</p>	<p>Yes, you have all the skills in the cluster. No, you have some or none of the skills in the cluster.</p>	<p>Select the skills clusters required for the OJT position.</p>
Operate telephone switchboard to answer, screen, or forward calls, providing information, taking messages, or scheduling appointments.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Greet persons entering establishment, determine nature and purpose of visit, and direct or escort them to specific destinations.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Schedule appointments and maintain and update appointment calendars.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/>
Hear and resolve complaints from customers or the public.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/>
File and maintain records.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="checkbox"/>
Receive payment and record receipts for services.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/>
Perform administrative support tasks, such as proofreading, transcribing handwritten information, or operating calculators or computers to work with pay records, invoices, balance sheets, or other documents.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input checked="" type="checkbox"/>

Employer Section: 2		Participant Section: 2
Company Name:	Date:	
Contact:	Phone:	
Employer specific skills not listed in the "tasks" section above		
Purchase office supplies and equipment and reconcile credit card monthly.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Make travel arrangements for senior managers, issue advances for meals and other expenses; book conference rooms, taxis, couriers, hotels, etc.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
Handle sensitive information in a confidential manner.	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<input type="checkbox"/> Yes <input type="checkbox"/> No	
	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Recognition and gratitude go to the OED, HECC, WTDB, LWDBs, and all WSO partners (agencies, organizations, and individuals) that provided information for this report. Oregon continues to develop innovative and responsive methods for meeting the demands of our ever-changing economic climate.

If you have questions regarding this report's content, please contact:

Kurt Tackman

kurt.r.tackman@hecc.oregon.gov

To conserve resources and be more environmentally friendly, this report was originally published in an electronic-only format.