



**OREGON WORKFORCE ALLIANCE  
EXECUTIVE COMMITTEE & BUSINESS MEETING  
February 8, 2012 – 9:00 – 11:00 a.m.  
Virtual Boardroom\***

*"Helping Rural Oregon Work" by skilling up rural citizens, business and industry to compete in the global economy.*

I.	Welcome and Introductions	Scott Koch, OWA President	9:00 a.m.
II.	OWA Consent Agenda a. Approval of October 2011 Minutes b. Treasurer's Report c. Resource Sharing Agreement Extension	Scott Koch	9:15 – 9:20, Action Page 1 Page 4 Page 6
III.	Report from The Oregon Consortium Board of Directors	Judge Mike McCabe	9:20 – 9:30, Info
IV.	Initiatives and Project Updates: - DOL Innovation Grant Opportunities - REIG Cluster Projects - On the Job Training & Back to Work Oregon - Region 11 Community Web Portal	Kris Latimer  Andrew Spreadborough, Susie Yeiter, Susan Buell  Kris Latimer, Monty Johnson  Beverly Leigh	9:30 – 9:45, Action  9:45 – 10:00, Info Page 8  10:00 – 10:10, Info Page 10  10:10 – 10:20, Info
V.	Update Regarding Talent and Skills Investments	Kris Latimer	10:20 – 10:25, Info Page 14
VI.	Intersection & System Impacts: - Budget Projections - Strategic Planning	Scott Koch, Mike McCabe, Kris Latimer	10:25 – 10:45, Info Page 15
VII.	Administrative Update	Kris Latimer	10:45 – 10:50, Info Page 16
IX.	Good of the Order a. Membership Update a. Next Meeting – April 12&13, Location TBD	Scott Koch	10:50 – 11:00, Info Page 18
X.	Adjourn	Scott Koch	Noon

**Note: Additional action items may be agendized at meeting.  
Equal Opportunity Employer / Program  
Auxiliary aids and services are available upon request**

**LIST OF VIRTUAL BOARD ROOM MEETING LOCATIONS**

<b>REGION</b>	<b>COUNTIES</b>	<b>HOSTING LOCATION/AGENCY</b>	<b>PHYSICAL ADDRESS</b>
1	Tillamook, Clatsop, Columbia	MTC Works	450 Marine Drive, Suite 140 - Astoria
6	Douglas County	Umpqua Training & Employment	760 NW Hill Avenue - Roseburg
7	Douglas, Coos, Curry	South Coast Business Employment Corporation	93781 Newport Lane – Coos Bay
9 & 10	Wasco, Sherman, Wheeler, Hood River, Gilliam, Deschutes, Jefferson, Crook	Central Oregon Intergovernmental Council	334 NE Hawthorne Ave - Bend
11	Klamath & Lake	WorkSource Oregon / COIC	801 Oak Ave. – Klamath Falls
12 & 13	Umatilla, Morrow, Baker, Union, Wallowa	CAPECO	721 SE 3 <sup>rd</sup> , Suite D - Pendleton



Oregon Workforce Alliance Meeting  
 October 27, 2011  
 2:00 – 4:00 p.m.  
 Virtual Boardroom / Conference Call

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**ATTENDANCE\***

OWA Members:

Joyce Aho	Robin Popp	Jim Pfarrer
Teri Simonis	Scott Koch	Marce Knight
Sheryll Bates	Mary Taylor	Oscar Johnson
Pete Bober	Bob Bahrns	Kathy Gover-Shaw
Art Hill	Jue-Jue Withers Lyon	Selaina Miller
Susie Cederholm	Chip Massie	Norm Gershon
Diana Knous	Archie Linman	Xochitl Esparza
Bob Craft	J.J. McLeod	

TOC Board Members:

Judge Mike McCabe

TOC Staff

Melissa Metz	Kris Latimer	Monty Johnson
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Guests

Tara Bishop	Deborah Hayward	Mike McCoy
Beverly Leigh	Perry Andrews	Randy Norris
Andrew Spreadborough	Susan Buell	Susie Yeiter

**MEETING SUMMARY**

I. Welcome and Introductions

Scott Koch called the meeting to order at 2:00 p.m. and introductions were made from remote sites. Remote sites for this meeting were established at MTC Works! – Astoria, UTE – Roseburg, SCBEC – Coos Bay, COIC – Bend, COIC – Klamath Falls, CAPECO Pendleton and the TOC/OWA office.

Prior to proceeding, Melissa Metz reviewed ground rules to facilitate the flow of discussion while utilizing the web-conferencing technology. She also noted that time was built into the agenda for local table-top conversation – after which remote sites would be asked to share their thoughts and comments.

II. OWA Consent Agenda

- a. Approval of July 2011 Minutes
- b. Treasurer’s Report
- c. Additions to the Eligible Training Provider List
- d. Policy on Prioritization for Services

MOTION: Art Hill made a motion to approve the Consent Agenda as presented. Motion was seconded by Robin Popp. Motion passed unanimously.

### III. TOC Board Report

Judge Mike McCabe provided the following report from the TOC Board meeting, held on October 20. He explained that the Board reviewed and approved the RSA Reconciliation for Program Year 2010, debriefed the most recent Audit Committee meeting, completed reappointment of the following OWA members, appointed two new members to the OWA, Reviewed the Quality Assurance Summary Report for PY 10, and held a discussion of several topics of interest to the counties including United States Postal Service – Post Office Closure List; and the Governor’s Regional Strategies.

### IV. One Stop Operator Activities

**One Stop Center Certification:** Members of the System Partners Committee presented the final draft of the TOC/OWA WorkSource Oregon One-Stop Center Certification Policy. This policy is in alignment with the updated OWIB policy regarding One Stop Center Certification. The position of the Governor and the OWA is to assure that businesses receive the most highly qualified job candidates; and that job seekers have an opportunity to know and understand their skills through a standardized skills review and become better job candidates by developing their skills. Via this Certification Policy, the OWA can assure that WSO Centers feature pro-active partners that fully utilize the resources within the One-Stop, as well as those of community partners, to better understand the workforce needs of businesses, to provide appropriate services to businesses and job seekers, and to prepare qualified applicants who are competitive for jobs.

**MOTION:** Norm Gershon moved, seconded by Art Hill, to adopt the TOC/OWA Policy #WIA-47-07/11 regarding WorkSource Oregon Center Certification and re-Certification and WorkSource Oregon Affiliate Office Charters. Motion passed unanimously.

**Resource Sharing Agreement Reconciliation:** Melissa Metz reviewed the information included in the packet regarding Resource Sharing Agreement (RSA) Reconciliation and explained that as specified in the Act, the Memorandum of Understanding (MOU) is an agreement developed and executed between the local board, the chief elected official and the One Stop partners on the operation of the TOC/OWA WorkSource Oregon System. The RSA is an addendum to the MOU and outlines the financial commitments and cost allocation methodology for sharing resources in the delivery of services for the specified program year. She then reviewed the RSA Reconciliation Report for Program Year 2010 which ended on June 30, 2011.

**MOTION:** Robin Popp moved, seconded by Joyce Aho, to accept the RSA Reconciliation Report for PY 10 as presented. Motion passed unanimously.

### V. Regional Roundtable – RWIB Transition

The groups were provided with time to discuss their current RWIB activity and transition plan discussions. Each group identified a lead speaker who then reported back to the meeting. In summary each region is approaching transition in a different way. Several regions are reaching out to other organizations and boards to establish relationships that will continue to inform the WorkSource system without the establishment of a separate and distinct group; Regions 9, 10 and 11 plan to continue in their current format – working with partners to address distinct needs of the region and local business and industries; Region 12 plans to use this as an opportunity to reinvent and re-energize their board.

RWIBs will submit written transition plans to the OWA in March for review at the April TOC and OWA Board meetings.

VI. Regional Economic Impact Grant – Cluster Development

Kris provided background regarding three small cluster grants that the OWA awarded earlier in the fall. Resources for these efforts were included in the Regional Economic Impact NEG Grant received by the OWA in 2010.

Region 6 – Truck Drivers / Transportation Cluster

Region 7 – Elder Care / Health Care Cluster

Region 10 – Central Oregon Brewers Guild

Susan Buell (R6/UTE), Susie Yeiter (R7/SCBEC) and Andrew Spreadborough (R10/COIC) provided updates on their projects to-date and will be giving updates regularly at OWA meetings over the next nine months.

VII. Administrative Report

Kris touched briefly on several items including funding, Streamlining Integrated Services Workgroups, and the PY 10 Quality Assurance Summary Report.

VIII. Officer Elections

Scott explained that the terms for current officers expire at the end of October. He then opened the floor for nominations for officers for a two year term through 2013.

MOTION: Robin Popp moved, seconded by Art Hill to nominate the following slate of officers for election:

Scott Koch – President;

Mary Taylor – Vice President;

Bob Bahrns – Secretary / Treasurer

Motion passed unanimously.

VIII. Adjourn

Scott Koch adjourned the meeting at 4:00 p.m. and thanked everyone for their attendance and participation.

\*Note: Attendance lists from remote sites were lost – additions/subtractions to attendance can be made prior to approval of minutes.

## THE OREGON CONSORTIUM & OREGON WORKFORCE ALLIANCE

### TREASURER'S REPORT

**Action Requested:** Accept Treasurer's Report for first six months of Fiscal Year 2011 - 2012. The fiscal year began July 1, 2011 and ends June 30, 2012.

**Information:** The Treasurer's Report compares revenues and requirements during the period of 7/1/11 – 12/31/11 with the annual budget.

The Reserve line shows the revenue over expenditures for this period. It will continue to decline throughout the year as expenditures are made by the Regions and the TOC/OWA Office.

**TOC/OWA Staff Contact:** Jennifer Handy, Financial Services Coordinator

THE OREGON CONSORTIUM & OREGON WORKFORCE ALLIANCE  
TREASURER'S REPORT

Fiscal Year 2011-2012  
July 1, 2011 - June 30, 2012

Report as of December 31, 2011

<u>REVENUES:</u>	<u>ADOPTED BUDGET</u>	<u>YEAR TO DATE</u>	<u>% OF BUDGET</u>
Revenue Fund - Grants	7,486,710	7,635,459	
Other Resources - Grant	4,552,285	5,833,876	
Revenue Fund - Non Grant	0	0	
General Fund - Non Grant	<u>88,961</u>	<u>86,752</u>	
 TOTAL REVENUE	 12,127,956	 13,556,087	 112%
 <u>REQUIREMENTS:</u>			
Expenditures			
<i>Regional Contracts</i>	11,377,187	5,405,674	48%
<i>Administrative Office</i>			
Personal Services - grant	420,239	190,877	
Personal Services - non-grant	0	0	
Materials & Services - grant	186,623	110,878	
Materials & Services - non-grant	2,000	889	
Capital Outlay	<u>5,000</u>	<u>0</u>	
Subtotal Administrative Office	613,862	302,644	49%
<i>Employment &amp; Training Services</i>			
Personal Services - grant	8,265	4,090	
Materials & Services - grant	121,242	32,516	
Materials & Services - non-grant	0	0	
Capital Outlay	<u>0</u>	<u>0</u>	
Subtotal E&T Services	129,507	36,606	28%
 TOTAL EXPENDITURES	 12,120,556	 5,744,924	 47%
General Operating Contingency non-grant	1	0	
Reserve for Future Requirements	7,399	7,811,163	
 TOTAL REQUIREMENTS	 12,127,956	 13,556,087	

# THE OREGON CONSORTIUM & OREGON WORKFORCE ALLIANCE

## Resource Sharing Agreement

### **Action**

#### **Requested:**

As the Resource Sharing Agreement used in the prior program year served the consortium well, it is recommend that TOC/OWA formally approve the extension of the 2010-2011 Resource Sharing Agreement through June 30, 2012.

#### **Information:**

As specified in The Workforce Investment Act, the Memorandum of Understanding (MOU) is an agreement developed and executed between the local board, the chief elected official and the One-Stop partners on the operation of the TOC/OWA WorkSource Oregon System.

The Resource Sharing Agreement is an addendum to the MOU and outlines the financial commitments and cost allocation methodology including elements such as the budget and the plan for sharing resources in the delivery of services for the specified program year.

The TOC/OWA Boards were presented a report in October 2011 of the actual costs borne by each agency and an after the fact account of the extent customers were co-enrolled into the multiple funding streams. The report also showed that the investments made by each partner were within the compliance range and no further commitment exists beyond what was invested at 6/30/2011 for that period.

#### **Staff Contact:**

Kris Latimer, Chief Executive Officer



**Regional Economic Impact Grant - Central Oregon Brewers Guild Project  
Oregon Workforce Alliance Update – January 31, 2012**

**Background:** The craft brewing industry in Central Oregon has been one of a few economic bright spots throughout the recession. According to OED regional economist Carolyn Eagan:

*In 2010, eight breweries in Deschutes County reported taxable barrels of beer to the OLCC. Those eight brewers sold 106,115 barrels of beer, 27 percent of the total barrels sold in the state by Oregon breweries and brew pubs. In people terms, local breweries and brew pubs sold 222 pints per Deschutes County resident of legal drinking age in one year. This was more than six times the number sold by all Oregon breweries and brew pubs per Oregon resident of legal drinking age last year. Since 2005, Deschutes Brewery sold at least 20 percent of the state's total taxable barrels concocted by Oregon breweries and brew pubs.*

*In Oregon, there were approximately 3,000 jobs at the 94 breweries and brew pubs that reported taxable barrels of beer in 2010. Not all of the 94 businesses on the OLCC list reported employment last year, but 80 firms did report. The reported jobs made up just 0.2 percent of the state's total employment.*

*Deschutes County breweries and brew pubs reported 450 jobs in 2010. That is 15 percent of all of the brewing employment in the state. For a county that had 4 percent (one of every 25 jobs) of the state's total employment that year, one out of seven jobs in Oregon brewing is quite impressive.*

Several Central Oregon breweries have discussed the need to form a regionally-based guild to develop publicity for the industry, to develop training opportunities, and to better coordinate with city and county government. The guild would promote the common interests of licensed brewers in Crook, Deschutes, and Jefferson counties and serve as a foundation to spin off other possible activities, such as employee skill development, brewer certifications, and recipe and process innovation.

Project partners Central Oregon Intergovernmental Council and Economic Development for Central Oregon recognized that a surge of new breweries and major expansions of existing breweries indicates Central Oregon is a natural fit for the industry. The combination of a healthy Craft Brewing community, skilled talent, and an increasing local and national demand for craft beer is pushing the industry's growth.

**REIG Grant Scope of Work:** The Central Oregon brewers, supported by COIC and EDCO, are moving forward with four primary scope of work elements:

- a. Convening of Brewers Guild membership, executive committee. Brewers have met on several occasions to achieve support for the guild formation and grant scope of work, and to select a leadership team.
- b. Formation of Brewers Guild as a formal non-profit organization. A CPA has been contracted to assist the guild in IRS form preparation, meetings, forecasted financials, and submission of the IRS filing fee.
- c. Design of logo and Brewers Guild website. A design firm has been contracted for these items.
- d. Development of an outreach and PR campaign in support of the region's breweries. A graphic design/public relations firm has been contracted to develop a PR message, media list development, mission statement, press materials, media coaching, press release development, and other tasks.

The implementation timeline has been condensed to meet the grant requirements of a March 15 completion date.

The Central Oregon Brewers Guild currently includes:

- 10 Barrel Brewing
- Bend Brewing Company
- Boneyard Brewing
- Cascade Lakes Brewing
- Deschutes Brewery
- Good Life Brewing Company
- McMenamins - Old St. Francis School
- Silver Moon Brewing
- Three Creeks Brewing
- 856 Brewing

As an example of the guild's work, they have drafted a message strategy revolving around key goals:

COBG Goals ("P.E.A.C.E")

- Promote: Promote Central Oregon brewing and create a beer culture to rival those of Portland, San Diego and Asheville, NC
- Educate: Educate brewers, beer enthusiasts and consumers about quality craft beer & brewing techniques
- Advocate: Advocate as a collective voice for the industry locally, regionally and nationally to represent our political and business positions
- Co-Operate: Co-Operate through open and forthcoming communications to Guild members about industry resources, issues and needs
- Enjoy: Enjoy life, beer and each other

**Next Steps:** This grant-funded project has a limited scope of work revolving around developing the framework for cooperation and collaboration, which will lead to a stronger, more efficient brewery sector. COIC and EDCO view this grant as "seed funding" investment, which will continue to benefit the region over time. Specific "next phase" Guild projects include:

- Education is a critical piece of what the Central Oregon Brewers Guild is striving to accomplish. The Guild will provide educational opportunities for the brewing community, retailers and beer enthusiasts. Part of the Guild's education outreach efforts will include exploration of a partnership with Central Oregon Community College to create a brewer certification program that would support continued industry growth and workforce development.
- The Central Oregon Brewers Guild will further promote and develop the partnership between the tourism agencies and local brewers to make Bend and Central Oregon a destination for exceptional craft beer. The Guild members are looking forward to creating and hosting local annual events and activities to promote Central Oregon craft beer.
- The Guild will be designing and implementing a comprehensive Central Oregon brewer's survey to assess the impact of the brewing industry on the local economy and identify opportunities for growth and improvement.
- The Guild will provide a unified voice in working with local government on infrastructure issues, including the City of Bend's wastewater capacity challenges.

**For more information:**

Andrew Spreadborough  
Community and Economic Development Manager  
Central Oregon Intergovernmental Council  
(541) 504-3306  
aspreadborough@coic.org



OREGON WORKFORCE  
PARTNERSHIP

*Better Skills • Better Jobs*

## Back to Work Oregon Fact Sheet

**The Goal:** To get 1,325 unemployed Oregonians back to work by June 30, 2012 using a program that consists of On-the-Job training paired with a National Career Readiness Certificate.

**The Program:** The program was identified by Governor Kitzhaber as one of his first five initiatives to get Oregon's economy back on track. The Governor requested and received \$3.4 million from Oregon's general fund to place 663 Oregonians into long term jobs using this program. Local Workforce Investment Boards agreed to match the Governor's investment by putting an additional 662 unemployed Oregonians into the program using local resources.

- *Oregon's National Career Readiness Certificate (NCRC)* demonstrates that an individual has the foundational skills necessary to succeed in the training plan and on the job, and provides the individual with a portable credential for future career growth.
- *On-the-Job Training (OJT)* is a "hire-first" program that reimburses a company for the cost of training a newly employee. A rigorous training plan is put in place by the company which leads to employee retention in the job. The employee becomes a tax payer, by drawing a paycheck during training, and beyond.

Back to Work Oregon, which consists of both the state funded and locally matched components of the program, integrates OJT with NCRC for maximum benefit for the employee and the company. Participants are brought into the program through WorkSource Oregon.

**Timeline:** The program began on July 1, 2011. This applies for both the portion of the program funded with state general funds and the portion of the program funded by Local Workforce Investment Boards with other funds. Local Workforce Investment Boards are expected to have all 1,325 workers placed into the Back to Work Oregon program by June 30, 2012, although participants may complete the program after that date.

**How is the program administered:** The Oregon Department of Community Colleges and Workforce Development administers the program at the state level. Oregon's seven Local Workforce Investment Boards implement the program locally in collaboration with WorkSource Oregon, Oregon Employment Department, Veteran's groups, Vocational Rehabilitation, Department of Human Services, and Community Colleges, Community Based Organizations and other partners.

**What does is the cost:** There is no direct cost to the company or the job seeker.

## Back to Work Oregon Frequently Asked Questions

**Q: *Who may qualify for the program?***

A: Any unemployed Oregonian who has been determined eligible and enrolled in the Workforce system and who is deemed eligible for training services under the Workforce Investment Act's Title 1B.

**Q: *Is the National Career Readiness Certificate required for both the state and locally funded components of the program?***

A. Yes. Both the general fund component and local match component consist of an OJT paired with the NCRC.

**Q: *What if someone cannot earn a National Career Readiness Certificate?***

A: Potential applicants are given an Initial Skills Review prior to NCRC testing and have the opportunity to improve their skills using free on-line WIN courseware. Individuals may also have opportunities to retest under the state's NCRC Guidance letter 06-10. However, there may be some applicants who cannot earn an NCRC. In these cases, the entity administering the program should record the individual's inability to earn an NCRC. However, an individual's inability to earn an NCRC should not disqualify him or her from applying for an OJT if s/he meets other job requirements.

**Q: *Does the applicant have to earn the NCRC prior to placement into the OJT?***

A: It is up to the entity administering the program to determine whether an applicant must earn an NCRC prior to placement into the OJT or during the placement.

**Q: *Does the individual have to qualify as a "Dislocated Worker" to participate in the program?***

A: No. Any unemployed Oregonian who has been determined eligible and enrolled in the Workforce system and who is deemed eligible for training services under the Workforce Investment Act Title 1B may participate.

**Q: *Does a job seeker have to register in I-MatchSkills?***

A: Participants determined eligible and enrolled in the Workforce system typically participate in the statewide "welcome process" which includes an Initial Skills Review and registration into I-MatchSkills.

**Q: *Are there any restrictions on the type of employers who may participate in the program?***

A: Local Workforce Investment Boards should follow their existing policies to determine which employers are eligible for the program.

**Q: *What are the requirements for the OJT Program?***

A: Local Workforce Investment Boards should use their existing OJT policies for both the state funded and matching components of this program. Typically, the program requires some evaluation of the company's ability to administer the program, the creation of an agreement/contract, the selection and hiring of an applicant by the company, the development and monitoring of a training plan, and the completion of an agreed upon retention period following completion of the training plan. Typically, companies do not receive full reimbursement for the cost of the OJT until the retention period has been completed.

**Q: *Does the Local Workforce Board match have to match the \$3.4 million state investment dollar for dollar?***

A: No. Local Workforce Investment Boards have agreed to fund 662 OJT/NCRC with local resources as the match to the 663 OJT/NCRC funded portion by the state. There is no requirement for a dollar to dollar match.

**Q: Which resources may Local Workforce Investment Boards use for the local matching OJT/NCRC component of the program?**

A: Workforce Boards may use Workforce Investment Act formula funds, the OJT National Emergency Grant, other state or federal grants, or any other resources for their matching component of the program. Each of these funding sources may have additional eligibility requirements associated with them, which Local Boards will have to take into account.

**Q: Which OJT/NCRC can be counted toward match at the local level?**

A: Any OJT with an NCRC that was not funded with the state general fund investment and was in process on 7/1/11 counts as match to the program.

**Q: Does the program target specific jobs or wage levels?**

A: The goal of the program is to place people in jobs with good wages and/or career pathways to the greatest extent possible. Each Local Workforce Investment Board should follow its policies related to placement wages and target industries/job titles.

**Q: How will this program be sustained?**

A: Currently, the Governor and Legislature have made a one-time investment into the program. Successful performance within the identified timelines will allow OWP and CCWD to make future requests to support the program.

## On the Job Training – Another Tool for Employers (You Hire, You Train, We Pay)

On the Job Training offers an outstanding opportunity for the WorkSource system to make a difference in the creation of jobs and opportunity for Oregonians. Following are details which we hope you will find useful as you inform employers of this tool.

### What is On-the-Job Training?

The purpose of an OJT is to encourage employers to hire and train workers.

### OJT Employers:

- Make the hiring decision -
  - WorkSource partners have a queue of trained and ready job seekers who can be referred
- Train the employee -
  - Customized training to the employee by the employer
  - Training duration of 1-6 months depending on business needs
- Employer receives partial wage reimbursement for the employee's training hours, based on the needs of the position
- Employer enters into OJT arrangement with intent to hire trainee as a full-time employee (30+ hours/week)

### OJT Employers can expect:

- Prompt payments of wage reimbursement with minimal paperwork required
- Trained staff to assist you through all phases of the OJT
- An opportunity to train employees your way

### Additional Info:

- The written contract must be signed prior to the first day of work.
- Job openings and employees must meet eligibility requirements and eligibility determination is swift.
- Position cannot be for less than 30 hours per week, temporary or seasonal (possible exclusions may apply);
- Principal method of employee payment cannot be commission or piecework.
- Position requires training beyond a brief period of orientation.
- A professional license or other certification requiring institutional training is not necessary for the position.

To view a list of providers offering on the job training opportunities – [click here](#).

If you'd like additional assistance or clarification regarding the Oregon Workforce Alliance and our support of the Back to Work Oregon – On the Job Training opportunities, please contact Kris Latimer, CEO at 541.928.0241 x219 or [kris@tocowa.org](mailto:kris@tocowa.org)

**THE OREGON CONSORTIUM  
FY'11 YEAR-ROUND PROGRAMS ADULT & DW**

**EXPENDITURES THRU:  
December 2011**

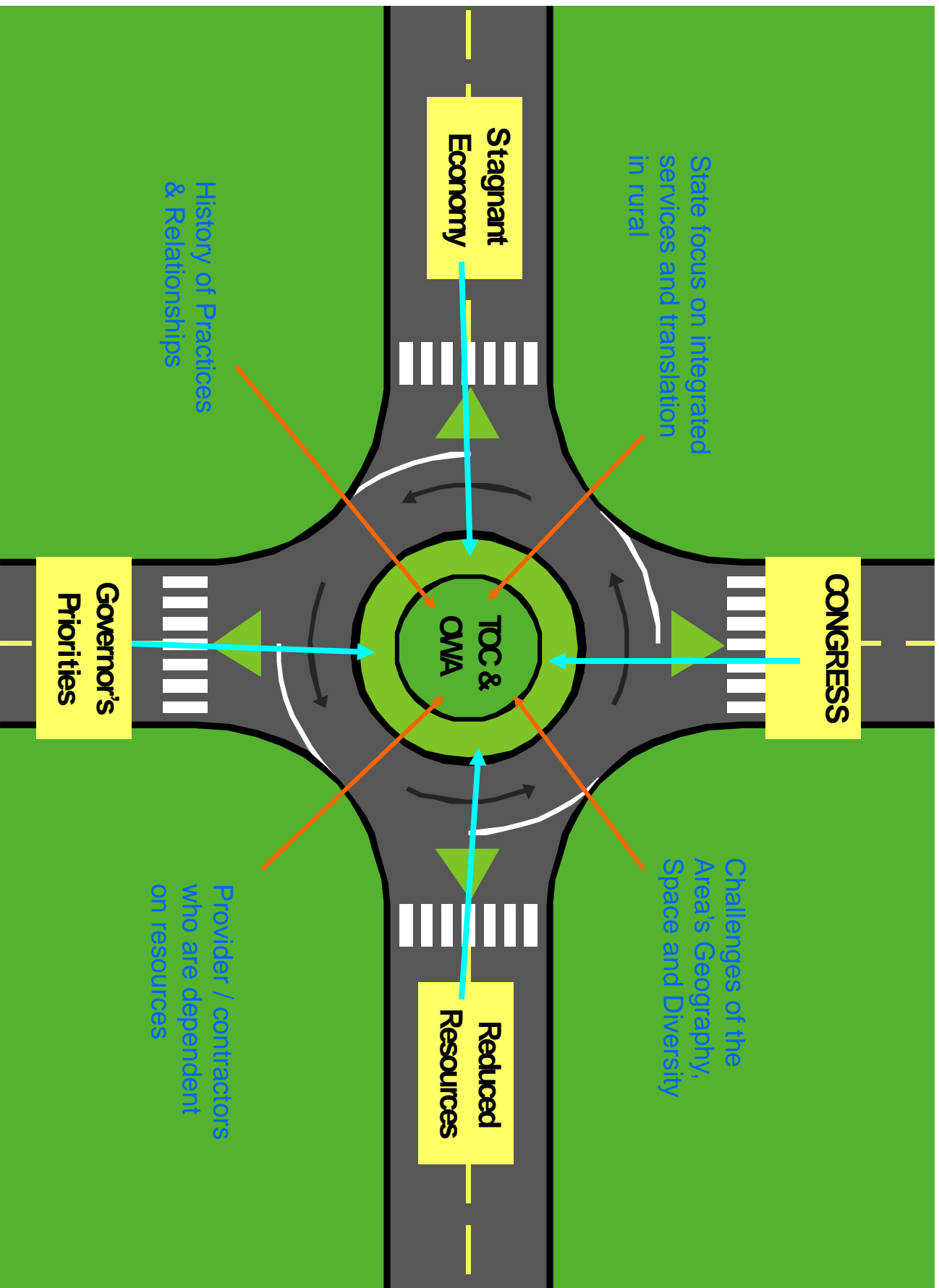
**REGIONS**

	<b>R-1 MTC</b>	<b>R-6 UT&amp;E</b>	<b>R-7 SCBEC</b>	<b>R-9 MCCOG</b>	<b>R-10 COIC</b>
Welcome	7,144.98	54,275.05	1,269.00	9,965.94	183,068.55
Job Search	20,078.71	20,024.74	37,810.62	69,406.13	86,512.70
Employer Services	879.92	12,390.59	8,756.93	193.67	0.00
Talent Development	64,608.43	149,538.27	114,767.20	93,803.12	212,173.90
Occupational Training	0.00	16,095.38	98,495.20	0.00	0.00
Support Services	0.00	10.00	55.85	0.00	0.00
WIA Mgmt	16,696.96	41,754.41	21,732.21	14,001.86	36,254.93
<b>TOTAL</b>	<b>109,409.00</b>	<b>294,088.44</b>	<b>282,887.01</b>	<b>187,370.72</b>	<b>518,010.08</b>

**Talent Development & Occupational Training**      **64,608.43**    **59%**    **165,643.65**    **56%**    **213,318.25**    **75%**    **93,803.12**    **50%**    **212,173.90**    **41%**

	<b>R-11 COIC</b>	<b>R-12 CAPECO</b>	<b>R-13 TEC</b>	<b>R-14 TEC</b>	<b>TOC RollUp</b>
Welcome	7,976.20	6,447.38	8,962.23	38,894.17	318,003.50
Job Search	51,990.98	16,511.59	30,799.14	35,543.12	368,677.73
Employer Services	0.00	1,460.36	0.00	0.00	23,681.47
Talent Development	143,212.83	52,519.22	55,693.01	66,319.84	952,635.82
Occupational Training	7,050.99	5,255.40	823.85	3,547.45	131,268.27
Support Services	2,477.22	220.49	0.00	1,850.65	4,614.21
WIA Mgmt	19,381.33	17,581.66	10,213.21	17,673.95	195,290.52
<b>TOTAL</b>	<b>232,089.55</b>	<b>99,996.10</b>	<b>106,491.44</b>	<b>163,829.18</b>	<b>1,994,171.52</b>

**Talent Development & Occupational Training**      **152,741.04**    **66%**    **57,995.11**    **58%**    **56,516.86**    **53%**    **71,717.94**    **44%**    **1,088,518.30**    **55%**





## The Oregon Consortium & Oregon Workforce Alliance Program Team Membership & Purpose

Program Team	Composition	Staff	Phone (541)	Email
<b>Lead</b>	Chief Executive Officer	Kris Latimer	928-0241 x219	kris@tocowa.org
<b>Members</b>	Program Operations Coordinator	Jackie Cray	928-0241 x213	<a href="mailto:Jackie@tocowa.org">Jackie@tocowa.org</a>
	Grants & Contracts Coordinator	Monty Johnson	928-0241 x228	<a href="mailto:Monty@tocowa.org">Monty@tocowa.org</a>

Team Purpose
The program team is responsible for program and resource development, quality assurance, and providing operational support for the effective investment and use of resources in conformity with the organization's mission and vision, program compliance, and performance requirements. Simply said, the Program Team provides timely and effective support to assist and assure the delivery of high quality services to customers.

Team Responsibilities
<ul style="list-style-type: none"> <li>• Grants Management – Performance, Evaluation, Compliance &amp; Reporting</li> <li>• Program Systems Management – Procurement, Development, Evaluation, Compliance &amp; Reporting</li> <li>• Special Dislocated Worker Services – Program Performance, Compliance and Management (TAA coord., NEG, SAA, Rapid Response)</li> <li>• One-Stop Certification and Re-Certification &amp; Resource Sharing Agreement Management</li> <li>• Local and State Plan Development</li> <li>• Grant writing and resource development</li> <li>• Complaint and Grievance Coordinator / Methods of Administration</li> <li>• Quality Assurance and corrective action</li> <li>• Management Information System – Management, Operations and Development</li> </ul>

Team Member / Purpose	Primary Functions
<p><b>Program Operations Coordinator</b></p> <p>Provides primary support for Adult, Dislocated Worker and Youth services, MIS users and technical assistance and guidance for data collection, documentation and compliance.</p>	<ul style="list-style-type: none"> <li>• Help desk and issue resolution</li> <li>• MIS coding &amp; participant file documentation guidance</li> <li>• Technical assistance</li> <li>• WSO Program Guide development and maintenance</li> <li>• Quality assurance support</li> <li>• <a href="#">MIS infrastructure and setup support</a></li> <li>• <a href="#">Grievance coordinator/Methods of Administration</a></li> </ul>
<p><b>Grant &amp; Contracts Coordinator</b></p> <p>Prepare and administer grants and contracts during the various stages of program delivery.</p>	<ul style="list-style-type: none"> <li>• Special Dislocated Worker Services</li> <li>• Program policy development and guidance</li> <li>• <a href="#">RSA management</a></li> <li>• Technical Assistance</li> <li>• <a href="#">Support local plan development</a></li> <li>• <a href="#">Program and grant management and development</a></li> </ul> <p>NOTE: Fiscal functions are described on the Fiscal Team Membership &amp; Purpose</p>
<p><b>Chief Executive Officer</b></p> <p>Provides vision, leadership and management in support of the team as a whole and the success of individual members while supporting program development and operations, and assuring the continued relevance and wellbeing of the TOC/OWA service delivery system.</p>	<ul style="list-style-type: none"> <li>• Team lead and management of all components</li> <li>• Integration Leadership Team</li> <li>• <a href="#">Grant writing and resource coordination</a></li> <li>• <a href="#">Quality assurance and compliance oversight</a></li> <li>• <a href="#">Oversee related personal services contracts / agents</a></li> </ul>

Items which are underlined are newly designated to this team member;  
Additional capacity for grant writing, plan development and quality assurance will be purchased, as necessary via personal services contracts



## The Oregon Consortium & Oregon Workforce Alliance Executive Team

Executive Team	Composition	Staff	Phone (541)	Email
<b>Lead</b>	Chief Executive Director	Kris Latimer	928-0241 x219	kris@tocowa.org
<b>Members</b>	Project Assistant	Jackie Grenz	928-0241 x214	jackie.g@tocowa.org

Team Purpose
<p>The Executive Team purpose to Engage, Educate, Assist and Direct in order for:</p> <ol style="list-style-type: none"> <li>1) The Oregon Consortium &amp; Oregon Workforce Alliance to achieve its mission for 2012;</li> <li>2) The TOC/OWA Administrative office team to accomplish / achieve its collective purpose;</li> <li>3) The TOC/OWA Administrative office team members to accomplish / achieve their individual goals and purpose.</li> </ol>

Team Responsibilities
<p>The duties of this team include on-going guidance and development of both the TOC and OWA boards and associated RWIBs, advocacy at the local, state and national levels, special project development and support, policy development and oversight, external communications in support of the mission / vision and our local providers, as well as administrative assistance in support of staff and local providers.</p> <p>Members of this team are servant leaders – whose functions are focused on mission / vision and the success of individuals and teams.</p>

Team Member / Purpose	Primary Functions
<p><b>Project Assistant</b></p> <p>Provide special project management/coordination, as well as, support internal administrative day to day operations of the office and success of the team members.</p>	<ul style="list-style-type: none"> <li>• Project management and coordination including the provision of technical assistance and guidance to providers and partners, organization of logistics, regular reporting, research, reconciliation, and dissemination of information;</li> <li>• Stand alone monitoring (when necessary) of SESP / OGTC contractors;</li> <li>• General office assistance and support including management of external communications (i.e. in-coming / outgoing mail, fax, phones);</li> <li>• Point of contact for SESP/OGTC</li> </ul>
<p><b>Chief Executive Officer</b></p> <p>Ensure that the organization, whole and in part, is achieving its mission and vision to Help Rural Oregon Work. This purpose is supported through actions to engage, educate, assist and direct a myriad of internal and external team members and customers.</p>	<ul style="list-style-type: none"> <li>• Manage and direct TOC/OWA administrative staff;</li> <li>• Present options for strategic actions and planning to the Boards, staff, and to regional providers;</li> <li>• Facilitate Board development and communication;</li> <li>• <u>Scheduling/Organizing Quarterly and Semi-Annual Board Meetings</u></li> <li>• Carry out the directives of the Board, including policies;</li> <li>• Ensure the development and operation of accountability and compliance systems;</li> <li>• Create and sustain an external presence for the organization at the local, state and national levels;</li> <li>• Create and manage a dynamic organization which is challenged to innovate and to exceed performance expectations</li> <li>• <u>Video conferencing</u></li> <li>• <u>Web development</u></li> </ul>



## The Oregon Consortium & Oregon Workforce Alliance Fiscal Team Membership & Purpose

Program Team	Composition	Staff	Phone (541)	Email
<b>Lead</b>	Chief Executive Officer	Kris Latimer	928-0241 x219	kris@tocowa.org
<b>Members</b>	Financial Services Coordinator	Jennifer Handy	928-0241 x217	jennifer@tocowa.org
	Grant and Contracts Coordinator	Monty Johnson	928-0241 x210	monty@tocowa.org

Team Purpose
The Fiscal Department anticipates needs and provides service in support of the Vision of 2012 through effective and efficient financial management services to internal and external customers. We promote and support fiscal responsibility through technical assistance, compliance monitoring, asset protection, contracts management, accurate record keeping and reporting, quality purchasing practices and sound cash management.

Team Responsibilities
The duties of this staff includes preparing and controlling the budget, preparing financial reports and overseeing accounting procedures, audit, technical assistance, contracts management, inventory control and procurement of supplies and equipment and human resources.

Team Member / Purpose	Primary Functions
<p><b>Financial Services Coordinator</b></p> <p>Maintain accurate, detailed and organized systems and processes for a strong accounting department and records, as well as, assemble data and draft reports for audit and grant compliance. To provide technical assistance to Regional staff.</p>	<ul style="list-style-type: none"> <li>• <u>Inventory</u></li> <li>• <u>Draw requests</u></li> <li>• <u>Accounts Payable/Receivable</u></li> <li>• Audit</li> <li>• Payroll Taxes</li> <li>• Human resources, Payroll, employee benefits, personnel policies</li> <li>• Participant, Liability and Property Insurance</li> <li>• Bank reconciliations, GL maintenance and reconciliations</li> <li>• Prepare budget</li> <li>• Financial reporting</li> <li>• <u>Network support</u></li> </ul>
<p><b>Grants &amp; Contracts Coordinator</b></p> <p>Prepare and administer grants and contracts during the various stages of program delivery.</p>	<ul style="list-style-type: none"> <li>• <u>Prepare annual allocations</u></li> <li>• <u>Manage/prepare grants and contracts</u></li> <li>• <u>Grant reporting</u></li> <li>• <u>Provide technical assistance and guidance</u></li> </ul>
<p><b>Chief Executive Officer</b></p> <p>View the fiscal system as a whole within the context of the mission of the organization resulting in efficient use of resources across the 24-county area.</p>	<ul style="list-style-type: none"> <li>• Oversee administrative and financial systems</li> <li>• Provide leadership and direction that supports compliance and professional standards</li> </ul>

Items which are underlined are newly added to this team member's position.

Additional capacity for fiscal support in the short-term will be purchased from Community Services Consortium (AP Clerk)

President - Scott Koch  
 Vice President - Mary Taylor  
 Secretary / Treasurer - Bob Bahrns

Mbr #	Affiliation	First Name	Last Name	Job Title	Business / Org	Term Expiration
1	R1 PS	Jack	McClave	Tax Accountant	Independent	13-Oct
2	R1 PS	Julie	Gassner	Manager, Career and Support Services	Tongue Point Job Corps Center	13-Oct
3	R6 PS	Bob	Craft	President	Northwest Education & Training Institute	12-Oct
4	R6 PS	Diana	Knous	Economic and Industrial Dev	Pacific Power	12-Oct
5	R6 PS	VACANT				
6	R7 PS	Mary	Taylor	Assistant		13-Oct
7	R7 PS	Marce	Knight	Administrator	North Bend Medical Center	13-Oct
8	R7 PS	Oscar	Johnson	President	Johnson Enterprises, Inc	13-Oct
9	R9 PS	VACANT				
10	R9 PS	VACANT				
11	R9 PS	VACANT				
12	R10 PS	Darrel	Wilson	Executive Director	Opportunity Foundation	13-Oct
13	R10 PS	Robin	Popp	Employment Specialist	Goodwill Industries	12-Oct
14	R10 PS	VACANT				
15	R11 PS	Archie	Linman	Owner/President	Klamath Basin Equipment	13-Oct
16	R11 PS	Kelly	McGarva	Manager	Lakeview Lockers	12-Oct
17	R11 PS	Chip	Massie	Executive Director	Klamath County Chamber of Commerce	13-Oct
18	R12 PS	Sheryll	Bates	Executive Director	Heppner Chamber of Commerce	12-Oct
19	R12 PS	Bob	Bahrns	Site Manager	Continental Mills	13-Oct
20	R12 PS	VACANT				
21	R13 PS	Kathy	Gover-Shaw	HR Manager	Behlen Manufacturing	13-Oct
22	R13 PS	Deborah	Beeson	Branch Manager	Community Bank	13-Oct
23	R13 PS	VACANT				
24	At Large PS	Scott	Koch	Vice President	Sterling Savings Bank	13-Oct
25	Education	VACANT				
26	Education	Teresa	Dowdy		La Grande Highschool	13-Oct
27	Labor	Pat	Davis	Labor Representative	United Brotherhood of Carpenters (Retired)	13-Oct
28	Labor	Greg	Creal	Labor Representative	IBEW LU 280	12-Oct
29	CBO	VACANT				
30	Eco Devo	Diana	Knous	Corporate Account Manager	Pacific Power	12-Oct
31	Eco Devo	Sheryll	Bates	Executive Director	Heppner Chamber of Commerce	12-Oct
32	OED*	Jim	Pfarrer	Area Manager	OED	12-Oct
33	OED*	Joyce	Aho	Manager	OED	13-Oct

34	Comm. Colleges	Pete	Bober	Director - Workforce & Community	Umpqua Community College	13-Oct
35	Comm. Colleges	Art	Hill	Vice President	Blue Mountain Community College	13-Oct
36	Voc Rehab**	Selaina	Miller	Employer Program Coordinator	Oregon Vocational Rehabilitation	12-Oct
37	AFS***	Lisa	Lewis	District Manager	Department of Human Services	13-Oct
38	AFS***	Xochitl	Esparza	TANF/Jobs Manager	Department of Human Services	13-Oct
39	Job Corps	Julie	Gassner	Manager, Career and Support Services	Tongue Point Job Corps Center	13-Oct
40	Title I	Tom	Moore	Executive Director	Central Oregon Intergovernmental Council	12-Oct
41	Title I	JJ	McLeod	CEO	South Coast Business Employment Corporation	13-Oct
42	MSFW	VACANT				
	Native American				Confederated Tribes of the Umatilla Indian	
43	Programs	Jullia	Withers-Lyons	Personnel Manager	Reservation	13-Oct
44	CSBG/HUD	VACANT				
	Senior Community					
45	Employment Program	Teri	Simonis	Executive Director	Training & Employment Consortium	13-Oct
46	PS At-Large	VACANT				
47	PS At-Large	VACANT				
48	PS At-Large	VACANT				

\*OED Representatives cover the following categories required under the Act: Wagner-Peyser, Trade Adjustment Assistance, NAFTA, State Unemployment Comp., and Migrant Seasonal Farmworkers

\*\*Vocational Rehabilitation represent Title I of the Rehabilitation Act of 1973

\*\*\*Adult & Family Services represents Welfare to Work, TANF and Food Stamp Act