



LANE WORKFORCE PARTNERSHIP EXECUTIVE BOARD MEETING
Thursday, September 15, 2022
11:30am – 1:00pm

Meeting being held in person and via the Zoom platform

In Person: 1401 Willamette Street, Eugene (2nd Floor of the Eugene Chamber Building, LWP Office)

Zoom: <https://us02web.zoom.us/j/89872479750>

AGENDA

*Mission: To Meet the Workforce Needs of Employers and Individuals
Through Partnerships and Innovation*

- I. CALL TO ORDER /*Jennifer Adams*
- II. PUBLIC COMMENT – *In accordance with Lane Workforce Partnership’s Public Comment Policy: Speakers will be taken in the order in which they sign up and will be limited to three minutes per public comment.*
- III. CONSENT CALENDAR
 - *Minutes of the May 19, 2022 Executive Board Meeting / Action* Pages 1 - 4
 - *Minutes of the June 16, 2022 Lane Council Meeting / Action* Pages 5 - 6
- IV. FINANCE MONITORING 2021/2022 (WIOA sub-recipients)/*Review and Discussion* Pages 7 - 35
Tiffany Cink, Lane Workforce Partnership
- V. PROGRAM YEAR 2022/2023 BUDGET MOD 1 /*Action* Pages 36 - 40
Tiffany Cink, Lane Workforce Partnership
- VI. EXECUTIVE DIRECTOR REPORT /*Information*
Ashley Espinoza, Lane Workforce Partnership
- VII. LWP YEAR-AT-A-GLANCE REPORT /*Information* Pages 41 - 42
Ashley Espinoza, Lane Workforce Partnership
- VIII. OTHER BUSINESS
- IX. ADJOURNMENT

Lane Workforce Partnership is an equal opportunity employer. With 48 hours of notice, auxiliary aids and services, and alternate formats are available to individuals with limited English proficiency free of cost. Requests can be made directly to LWP or with the assistance of TTY: Oregon Relay Services at 1-800-735-2900.



LANE WORKFORCE EXECUTIVE BOARD MEETING

Thursday, May 19, 2022

11:30am – 1:00pm

MINUTES

In Attendance: Jennifer Adams, Stan Pickett, Celeste Marshall, Solomon Harris, Shondra Holliday, Mike Clark, Damien Pitts, Greg Ervin
Absent: Joe Berney
Staff: Ashley Espinoza, Tiffany Cink, Anne Nestell, Stephanie Lovell

Action Summary	Motion	Seconded	Status
Approved Executive Board Meeting Minutes, April 21, 2022	Mike Clark	Greg Ervin	Unanimous Approval
Adopted the Original General Operating Budget for 2022-2023 as presented	Greg Ervin	Mike Clark	Unanimous Approval

I. CALL TO ORDER

Jennifer Adams called the meeting to order.

II. PUBLIC COMMENT – *In accordance with Lane Workforce Partnership’s Public Comment Policy: Speakers will be taken in the order in which they sign up and will be limited to three minutes per public comment.*

There was no public comment.

III. CONSENT CALENDAR

Mike Clark made a motion to approve the April 21, 2022 Executive Board meeting minutes. Greg Ervin seconded and the motion was unanimously approved.

IV. EXECUTIVE DIRECTOR REPORT

Ashley Espinoza reviewed the roles and responsibilities of the workforce council, board and workforce system as a whole.

The Lane Workforce Council (comprised of the County of Lane, and the Cities of Cottage Grove, Eugene, Florence, and Springfield) serves as the Chief Elected Official for Lane County. Some of the responsibilities for this group include:

- Appointing members to the Lane Workforce Board
- Serving as the grant recipient for funds allocated to the local area;
- Approving the Lane Workforce Board budget;
- Participating in the development, approval, and submission of the local strategic plan;

- Participating in the selection of one-stop operators and other service providers;
- Carrying out local program oversight; and
- Participating in the negotiation of local performance measures.

The Lane Workforce Partnership serves as the fiscal and administrative agent for Lane County workforce programs. The purpose of the Corporation is to work in concert with the business community and public agencies to promote job opportunities for unemployed individuals and individuals who need further training to maintain or advance their current job position.

The Lane Workforce Board serves as the designated Local Board for Lane County. The Lane Workforce Board is comprised of business reps (51%), labor and community-based organization reps (20%), higher education and adult education & literacy reps, and vocational rehabilitation, Wagner Peyser, and economic development reps. The role of the board is to be a catalyzer, convener, analyzer, broker, community voice, and capacity builder/investor.

The Oregon workforce system is comprised of the following agencies:

- Oregon Employment Department (OED)
- Higher Education Coordinating Commission (HECC)
- Bureau of Labor and Industries (BOLI)
- Oregon Department of Human Services (DHS)
- Oregon Commission for the Blind (OCB)

Locally, our system performance partners include:

- Lane County Department of Human Services, Self Sufficiency
- Lane Community College
- Oregon Employment Department
- Vocational Rehabilitation Services
- Easterseals
- Connected Lane County (includes Looking Glass and Bethel School District)
- Marcola School District
- Lane County Youth Services

Priority Populations to serve:

- Displaced homemakers
- Low-income individuals and families
- Individuals age 55 and older
- Returning citizens (ex-offenders)
- Homeless individuals
- Youth who are in or have aged out of the foster care system
- English language learners
- Individuals facing substantial cultural barriers
- Eligible migrant and seasonal farm
- Single parents
- Long-term unemployed individuals
- TANF (Temporary Assistance for Needy Families)

- Individuals with disabilities that
- Veterans and Veterans Spouses
- Disabled Veterans
- Indians
- Alaska Native
- Native Hawaiians

Ms. Espinoza reviewed the staff organizational chart and noted that some job titles have been updated along with also adding a new position, Director of Community Engagement.

We are in negotiations with Onward Eugene to lead our sector strategy work. Onward Eugene has already been working with us by providing On-the-Job business services.

V. PROGRAM YEAR 2022 – 2023 BUDGET

Tiffany Cink provided a summary on the Program Year 2022-2023 Budget. Lane Workforce Partnership annually prepares the original budget for final adoption by the LWP Executive Board in May with a Budget Modification #1 in September or October to finalize revenue allocations and carry-forward.

Revenue increased from the 2021-2022 Modification #1 total of \$6,543,687 by \$3,004,170 to \$9,440,857.

The federal Department of Labor Workforce Innovation and Opportunity Act (WIOA) Program Year 2022/2023 formula allocations for the states were published on May 6th with decreases for Oregon in all categories (WIOA Adult, WIOA Youth, WIOA Dislocated Worker). The overall decrease is approximately 5.5%. The State of Oregon Higher Education Coordinating Commission Office of Workforce Investments (OWI) hasn't published their allocations for the local areas. The WIOA funds in this budget are based on estimated carry-over and new allocations which will be finalized with budget modification #1.

Total expenses increased from \$5,451,225 by \$1,242,370 to \$6,693,595.

- Reserve for Future Expenditures increased from \$985,462 by \$1,761,800 to \$2,747,262. The reserve will fund the on-going work in both the HOWTO Grant and the ARPA portion of Prosperity 10,000 in addition to funding the existing WIOA Adult, Youth, and Dislocated Worker programs during July, August, and September of 2023.
- Personnel Services represent 15% of annual expenses.
- Materials and Services are \$286,506, 4% of annual expenses.
- Community Investments represent 81% of total expenses.

Greg Ervin made a motion to approve adopting the Original General Operating Budget for 2022 – 2023 as presented. Mike Clark seconded and the motion was approved unanimously.

VI. OTHER BUSINESS

Damien Pitts announced that Springfield has approved at least \$2,500 a year to start working with Sister Cities International to create a partnership with a specific city in a foreign country. Currently

Springfield does not have any sister cities – Eugene has four. Mr. Pitts would love to get youth involved in this process.

Ms. Espinoza shared that the Eugene Chamber Celebration of Business event is happening this coming Monday. LWP purchased a table and board members along with staff from Lane County Health and Human Services will be attending.

Micah Elconin, Lane County’s Food and Beverage Strategist is starting the Food Unpacked events again – these are good events to participate in and learn what is happening in the industry and locally. LWP has tickets for these events if you are interested in attending.

VII. ADJOURNMENT

Jennifer Adams adjourned the meeting.



LANE WORKFORCE COUNCIL MEETING

THURSDAY, June 16, 2022

11:30am - Noon

MINUTES

In Attendance: Joe Berney, Mike Clark, Greg Ervin, Damien Pitts

Staff: Ashley, Anne Nestell

<u>Action Summary:</u>	<u>Motion</u>	<u>Seconded</u>	<u>Status</u>
Re-appointed Sabrina Cunliffe, Grant Matthews, and Laura Vinson to an additional three-year term on the LWP Board beginning July 1, 2022	Greg Ervin	Mike Clark	Unanimous Approval
Appointed Heidi Larwick and Miles Pendleton to the LWP Board of Directors for three-year term beginning July 1, 2022	Mike Clark	Damien Pitts	Unanimous Approval

I. CALL TO ORDER

Joe Berney called the meeting to order.

II. PUBLIC COMMENT – *In accordance with Lane Workforce Partnership’s Public Comment Policy: Speakers will be taken in the order in which they sign up and will be limited to three minutes per public comment.*

There was no public comment.

III. RE-APPOINTMENT OF LANE WORKFORCE BOARD MEMBERS WITH TERMS EXPIRING

Greg Ervin made a motion to re-appoint Sabrina Cunliffe, Grant Matthews, and Laura Vinson to the Lane Workforce Partnership Board of Directors for an additional three-year term beginning July 1, 2022. Mike Clark seconded and the motion was unanimously passed.

IV. APPOINTMENT OF NEW LANE WORKFORCE BOARD MEMBERS

Mike Clark made a motion to appoint Heidi Larwick and Miles Pendleton to the Lane Workforce Partnership Board of Directors for a three-year term beginning July 1, 2022. Damien Pitts seconded and the motion was unanimously passed.

V. OTHER BUSINESS

Ms. Espinoza shared that LWP has plans to engage all board members in conversations in between the quarterly board meetings to get a better understanding of how they, the board member, can be most effective on the board, and then how we, as the board, can be more responsive to the needs that are brought to our attention.

VI. ADJOURNMENT

Joe Berney adjourned the meeting.

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ANNUAL SUB-RECIPIENT FISCAL AND PROGRAM MONITORING 2021-2022

BACKGROUND

The State of Oregon Higher Education Coordinating Commission issued a revised Monitoring, Corrective Actions, and Sanctions Policy on August 18, 2022. The policy requires Local Workforce Boards to monitor subrecipient contractors providing Workforce Innovation and Opportunity Act (WIOA) Title I Programs annually and to provide the reports to the local board including the chief local elected officials. Lane Workforce Partnership (LWP) completes both Fiscal and Program Monitoring of Subrecipients in compliance with our Finance Policy #6 Audit Resolution System. Historically, only the consolidated results of the subrecipient monitoring have been provided in our Mid-Year and Year-End Program Performance Reports.

DISCUSSION

2021-2022 LWP Subrecipients:

- Oregon Manufacturing Extension Partnership (OMEP) – One Stop Operator
- Lane County Health and Human Services (HHS) – WIOA Adult and Dislocated Worker
- Lane Education Service District through Connected Lane County (CLC) – WIOA Youth
- Lane County Youth Services (LCYS) – WIOA Youth
- Marcola School District (Marcola) – WIOA Youth

The attached pages include the final reports for each of the above subrecipients.

OMEP is our One-Stop Operator. The One Stop Operator is a federally required part of the WIOA One Stop System and OMEP has been an outstanding partner in our work since 2017. OMEP is primarily federally funded through the Department of Commerce Manufacturing Extension Partnership Program and works throughout the State of Oregon and they are the One Stop Operator for seven of the nine Local Workforce Boards in Oregon. During 2021-2022, we paid \$30,000 for OMEP to accomplish the following work:

- Work with the Lane Local Leadership Team to facilitate the implementation of Lane’s WorkSource Center re-opening plan
- Assess and provide continuous improvement work plan in accordance with the WorkSource Oregon Operational Standards
- Facilitate weekly Lane Local Leadership Team meetings
- Member of Lane Executive Leadership Team
- Lead the Lane Regional Business Services Team
- Lead the Lane Continuous Improvement Team

HHS is our WIOA Adult and Dislocated Worker Service provider operating primarily from the WorkSource Oregon Lane office at 2510 Oakmont Way. The 2021-2022 Contract was \$1,756,085. The Fiscal Monitoring found no significant issues with no Findings or Questioned Costs in their external audit report completed by Moss Adams, LLP. The Program Monitoring included the review of 50 participant files with the following from Cindy Perry’s report:

Overall Observations:

- The WIOA Adult and DW Scholarship program is being managed well. Participants are being actively case managed, required records are accurate and up-to-date, skill gains and

credentials are being captured and recorded as well as proof of completion documents collected and filed.

- The WIOA Adult and DW On-the-Job Training (OJT) program is being managed well and has demonstrated many improvements in the past year. Of significant improvement is the best practice of including a wage summary report with the OJT invoice that allows for easy review and accuracy in OJT reimbursement calculations.
- The Dislocated Worker Grants primarily provide career services to eligible dislocated workers. Monitoring trends indicate improvement in eligibility determination. There is some improvement in active case management, while a need for staff training in the concepts of actively engaging participants in services remain apparent.
- The WorkEx program is also being managed well and appears to be off to a good start. There is some evidence that customers are enrolled in WorkEx prior to completing the full eligibility and registration process which will need to be corrected.

Best Practice Observations:

- Staff have met and/or exceeded enrollment goals for WIOA scholarship and OJT programs.
- Development of an OJT wage reimbursement summary provides a clear explanation of the OJT invoice amount.
- Staff are doing an excellent job with co-enrolling participants in multiple grants/funding sources to the benefit of the participant.

CLC is one of three WIOA Youth providers during 2021-2022. The primary service location is Spark on 7th at 22 West 7th Avenue. The 2021-2022 contract was \$890,000. The Fiscal Monitoring noted lower than expected expenditures at the review point of December 2021. There were no Findings or Questioned Costs in the Lane ESD Audit Report completed by Pauly Rodgers and Co, PC. The Program Monitoring included the review of 30 participant files with the following from Anne Nestell's report:

Observations:

- Total overall expenditures are below where they should be at this point in the year. Current expenditures are 58% (\$516,713) and should be at a minimum of 75% (\$667,500).
- Work Experience expenditures are above the 20% requirement - currently 31% (\$162,028) of total expenditures.
- Of the 195 participants in the program, there are 38 participants in the 31 – 60 days since last qualifying service and 5 participants in the 61 – 90 days since last qualifying service. It is the expectation of this program that there is on-going communication no less than once every 30 days.

Best Practice Observations:

- Staff have exceeded enrollment goals for the WIOA Youth Program.
- Connected Lane County developed comprehensive Standard Operating Procedures for the WIOA Youth Program.
- Hired a full-time Peer Support Specialist to help support youth who struggle with navigating mental health, psychological trauma, and substance abuse.
- Staff are doing an excellent job with case management.

Neither Lane County Youth Services nor Marcola School District had any areas of significant concern; although, both were under expended at the time of review.



LANE WORKFORCE PARTNERSHIP

One Stop Operator Fiscal Monitoring – Oregon Manufacturing Extension Partnership (OMEP)

Date: 5/6/2022
Contract#: 31149 Total Contract Amount: \$30,000.00
Re: 2021-2022 Finance Monitoring Desk Review – November 2021 Invoice

OMEP: Denise Masanga, Controller
LWP: Tiffany Cink – Director of Finance, Cindy Perry – Director of Workforce Investments

Written responses to the Lane Workforce Partnership One Stop Operator Fiscal Monitoring Questionnaire were provided by Denise Masanga. The following details were noted:

- All services provided are completed through a Contractor of OMEP, Kendall Lenhares.
- No significant variances to budgeted totals were noted.
- OMEP has a federally approved indirect cost rate and agreed to limit indirect expenses for 2021-2022 to the WIOA Admin limit of 10%. All other expenses are direct WIOA Program charges.
- No program income was generated.
- Total expenditures for November 2021 were detailed in the general ledger provided and equal the \$1340.62.00 in expenditures reimbursed for the period. The allocation of costs between the two budgeted funding streams was in-line with the active enrollment of customers in I-Trac.

The CAFR including an Independent Auditor's Report prepared by Kern and Thompson, LLC for the year ended 6/30/21 was provided electronically. The Schedule of Federal Awards details all federal awards with CFDA numbers. For the year ended 6/30/21, there were no Findings or Questioned Costs and all WIOA Funds from LWP were detailed as such on the Schedule of Expenditures of Federal Awards.

Prepared by:

Tiffany Cink

Tiffany Cink, Director of Finance
tiffanyc@laneworkforce.org



LANE WORKFORCE PARTNERSHIP

Worksource Lane Fiscal Monitoring – Lane County HHS
2021-2022 Fiscal Desk Review – November 2021 Invoice

Date: 6/16/2022
Contract #: 31148 and modifications Amount: \$1,756,085.00

Lane County HHS: Connie Perry, Accounting Analyst; Deanna Strachan-Wilson, Workforce Programs Supervisor
LWP: Tiffany Cink, Cindy Perry

Written responses to the Lane Workforce Partnership Adult Services at WSL Fiscal Desk Monitoring Questionnaire were provided by Connie Perry and Deanna Strachan-Wilson. The following details were noted:

- Payroll records are tracked in the PeopleSoft Timecard System. Both employees and supervisors sign timesheets.
- No significant variances to budgeted totals were noted.
- All Staff were verified by Cindy Perry, Director of Workforce Investments.
- For all Customer Enrollment and related payment verifications, see “Lane County Program Monitoring Report 21_22” starting on page 2 which is incorporated into this fiscal monitoring. All observations, concerns and potential questioned costs are considered part of this fiscal monitoring. All required responses and deadlines must be met and will be reviewed for fiscal compliance.
- Lane County has a federally approved indirect cost rate plan and updates the actual charges based on the annual cost plan.
- No program income was generated.
- Total expenditures for November 2021 were detailed in the general ledger provided and equal the \$113,964.78 in expenditures reimbursed for the period. The allocation of pooled costs for Staff and Lane County charges between the budgeted funding streams was in-line with the active enrollment of customers in I-Trac.

The Comprehensive Annual Financial Report including an Independent Auditor’s Report prepared by Moss Adams, LLP for the year ended 6/30/21 was provided electronically. The Schedule of Expenditure of Federal Awards details all federal awards with CFDA numbers. The WIOA funds are detailed as “Passed through Lane Workforce Partnership” and match the amount of reported expenditures, although the Contract Number needed to be updated. For the year ended 6/30/20, there were no Findings or Questioned Costs reported by Moss Adams, LLP.

Summary prepared by:

Tiffany Cink

Tiffany Cink, Chief Operating Officer
tiffanyc@laneworkforce.org

ADULT/DW PROGRAM FILE MONITORING

Health and Human Services

Program Year 2021

WIOA Adult/DW Program Provider:

Steve Manela/Deanna Strachan-Wilson – Lane County Health and Human Services

Date(s) of Report:

May 5, 2022

2021 Contract Amount:

\$1,756,085

Total Participants Included in File Review:

WIOA Adult & DW Scholarship & Support Services Participants: 15

WIOA Adult, DW OJT Participants: 6

DWG COVID Participants: 12

DWG Fire Restoration and Recovery Participants: 13

Work Ex Participants: 4

Total Number of Files Reviewed: 50

See Attachment A List of Participants for the name and I-Trac Number of each file reviewed.

Overall Observations:

The WIOA Adult and DW Scholarship program is being managed well. Participants are being actively case managed, required records are accurate and up-to-date, skill gains and credentials are being captured and recorded as well as proof of completion documents collected and filed.

The WIOA Adult and DW On-the-Job Training (OJT) program is being managed well and has demonstrated many improvements in the past year. Of significant improvement is the best practice of including a wage summary report with the OJT invoice that allows for easy review and accuracy in OJT reimbursement calculations.

The Dislocated Worker Grants primarily provide career services to eligible dislocated workers. Monitoring trends indicate improvement in eligibility determination. There is some improvement in active case management, while a need for staff training in the concepts of actively engaging participants in services remain apparent.

The WorkEx program is also being managed well and appears to be off to a good start. There is some evidence that customers are enrolled in WorkEx prior to completing the full eligibility and registration process which will need to be corrected.

Best Practice Observations:

- Staff have met and/or exceeded enrollment goals for WIOA scholarship and OJT programs.

- Development of an OJT wage reimbursement summary provides a clear explanation of the OJT invoice amount.
- Staff are doing an excellent job with co-enrolling participants in multiple grants/funding sources to the benefit of the participant.

Improvement Since PY 20 Monitoring:

- The OJT wage summary document makes the review process to determine accuracy against payroll records very efficient.
- The OJT program records indicate improvement in terms of ensuring full compliance with the OJT program.

Concerning Observations from PY 20 Which Continue to Persist in PY 21:

- Priority of service documents are not collected consistently and there is little evidence that priority of service is applied outside of the WIOA Scholarship program. Priority of service should be documented in order to demonstrate staff awareness of and compliance with the LWP Priority of Service Policy.
- The case notes regarding the provision of tuition payments and supportive service needs are disconnected from the Employment Specialist. A majority of case notes regarding the award and payment of tuition and support services are entered into I-Trac by the Office Assistant.
- While Scholarship training participant case notes have improved in terms of tying the occupation to the training goals, they do not include information regarding the selected training, provider of the training, and cost of the selected training.
- A closing case note for scholarship participants needs to be completed regarding employment status and whether or not follow up services after exit are an anticipated need.
- Of the 50 participant files reviewed, there is only one in which there is evidence of engaging the customer in MyWorkSource and/or the use of the goals tab in i-Trac.

New PY 20 Concerning Observations:

Active Case Management:

- Not all Employment Specialists are providing active case management services at least once every 30 days. There are several instances where case notes indicate no response/contact with a participant. The Employment Specialist needs to establish an expectation with the participant for on-going communication no less than once every 30 days.
- There is evidence of case notes indicating a follow up action needed but no evidence that it was provided.
- In general, there are no service completion, employment, or employment follow up case notes.
- There are rarely any case notes or services confirming and documenting the start date of a participant's training (scholarship and OJT).

Eligibility and Enrollment Documentation:

- Registration into a grant needs to follow eligibility determination for the grant. The Welcome/registration process is incomplete for some of the participants enrolled in DWG and WorkEx grants.
- There are several instances in which staff have duplicate enrollments in DWG funding sources. Staff need to be trained to complete a search of the customer and enroll in the customer in the grant only once.

LWP Policy Compliance:

- The LWP Training policy requirement that all customers are required to attend either a Career Exploration Workshop or a one-on-one Career Advisor appointment to ensure the customer is receiving information needed to make an informed choice about the selection of the occupation and training program for which they would like to pursue is not being followed consistently.
- There were several instances in which staff request to remove exits and then fail to enter the actions associated with the request. Staff need to be training in active case management, follow up, and follow through needed to keep customers active in all funding sources in which the customer is enrolled.

General Observation:

Participants enrolled in DWG or WorkEx programs that are employed in a work-based training service, are included in the denominator for the measurable skill gain performance measure. While we may think of this service as an employment service, it is actually a training service. Therefore, the service needs to have training goals attached and completion of those goals need to be documented as a measurable skills gain. This may be able to be accomplished through the active use of the Individual Service Strategy.

Records Requiring Corrections:

There are several records in which items are missing documentation, receipts for support services, record completion. While these do not, in general, pose a concern for disallowed costs, they do need to have corrections made. See Attachment B – Records Requiring Corrections.

Potential Questioned Cost:

The following records need corrections that are more serious in nature and could result in a disallowed cost if not corrected:

The following observations represent potential questioned costs:

WIOA Training and Support Services:

Participant #4109877 – J. Winters

Unable to clearly tie the receipts provided to the request for funds – specifically the amount paid for tuition.

Correction needed:

- Provide a summary explanation that maps the receipts to the payment for both tuition and support services paid.

DWG COVID:

Participant #2518103 – R. Castle

The provision of support services follows the exit date.

- The enrollment date and exit date for DWG are 8/25/21.
- Per staff request, the exit was removed on 1/31/22, but staff failed to enter a service to keep the record active.
- A support service, charged to DWG was provided on 11/5/21, which is after the exit date.
- In the DW record, the last service date is 11/5/21 which is the same as two of the support services provided.
- A case note denotes follow up provided on 3/7/22, but there is no associated service documented.

Correction Need:

- Request to have the exit removed for both DW and DWG record.
- Enter the service provided on 3/7/22 in the DWG record.

Participant #1917755 – R. Wolfe

There are no DWG eligibility documents in e-Bridge.

Correction Needed:

- Upload all DWG eligibility and enrollment documents into e-Bridge

Work Ex:

Participant #2552200 – S. Yon

There are no WorkEx eligibility and enrollment documents in e-Bridge.

Correction Needed:

- Upload all WorkEX eligibility and enrollment documents in e-Bridge.

Participant #1579866 – T. Bertolini

There are eligibility and enrollment documents missing in e-Bridge.

Correction Needed:

- Applications for all fund sources in which customer is enrolled need to be completed both in i-Trac and e-Bridge

DWG Fire:

Participant #1590872 – D. McColligan

Customer is not registered with Selective Service and therefore has not demonstrated eligibility for services.

- This customer is not registered with Selective Service. There is no explanation on file as to why the customer failed to register. There is no request for approval submitted to LWP to enroll this customer.
- There is a support service provided on 4/18 in the amount of \$89.98 that may be a disallowed cost due to the customer not be registered with selective services and approved for enrollment.

Correction Needed:

- 1) Customer must provide an explanation regarding their failure to register with Selective Service. This must be sent to LWP Director of Workforce Programs for WIOA services eligibility determination.
- 2) If the customer fails to comply, their participation in the OJT program must be discontinued and the support service provided on 4/18 in the amount of \$89.98 will be deemed a disallowed cost

Monitoring Outcomes Summary:

Lane County Health & Human Services has demonstrated many improvements in their management of the WIOA programs this past year. While there are corrections noted in the monitoring review that need to be addressed, it is evident that overall staff are doing a tremendous amount of work and have worked diligently during this past year to meet contractual expectations and compliance.

LWP is requesting Contractor to correct the items listed above in Potential Questioned Costs by May 31, 2022. A summary of the corrections shall be included in Contractor's response to this monitoring report, which shall be due on May 31, 2022.

Within the Contractor's response to the Monitoring Report, Contractor shall also outline their plan to provide corrections to the items listed in Attachment B. NOTE: This is not a Corrective Action Plan, rather it is a response indicating the Contractors plan to correct the accuracy of the records indicated in Attachment B.

Upon review of the monitoring response from Lane County Health and Human Services, Lane Workforce Partnership will provide Contract with a final Monitoring Report for Program Year 2021/2022.

List of Participants Reviewed

Name	Number
WIOA Scholarship Participants	
ROSENBURG, BRENDAN	4104437
Winters, Jennifer	4109877
Frank, Richard	531586
Asmus, Yeldez	3914332
Elmquist, Rio	2819970
Reinhart, Thomas	1592983
Sanchez, Joselin	4125087
Support Services	
Jensen, Anthony	2529652
Bailey, Marissa	2392125
Cullmer, Colton	4100237
Jaganthan, Tharani	4108977
Johnson, Amber	981592
Brady, Ryan	3844117
Garza, Isreal	1457033
Claassen, Christina	2364645
OJT	
Baker	3954818
Nakhanthy	49003951
Fontt	4102755
Heulitt	4101464
Christensen, Brandon	2560617
Gander, Rick	2568115
DWG COVID	
Arvilla, Casey	2503578
Bennett, Crystal	2495142
Castle, Remy	2518103
Duboyce, Crystal	2529400
Johnson, Donna	1721141
Koch, James	1234974
Pulliam, Michele	1002967
Rounds, Amanda	2552695
San Miguel, Santiago	1902077
White, Tristin	2557265
Wolfe, Rachel	1917755
Yon, Sabra	2552200
DWG Fire	
Cranor, Evan	2144100
Foraker, Tammy	2481470
Garrett, Jacqueline	2469429
Haley, Shasta	2497789
King, Forrest	498876

Marcroft-Clark, James	2549732
McColligan, Danny	1590872
Place, Leif	2503349
Stanley, Melanie	2493196
Taul, Robert	2086417
Tyner, Austin	2550192
Williams, Jennifer	2558344
Winningham, Samantha	2496274
WorkEX	
Bertolini, Toni	1579866
Fadil, Mounir	2211863
Heath, Stacy	1515401
Parada, Alejandra	2055757

Records Requiring Corrections

NOTE: The following records need to have corrections made in one or more of the funding sources for which the participant is enrolled. While the random selection of case files may have focused on a specific funding source, all records within which the participant is enrolled was reviewed. Therefore, the correction needed may be for an activity/fund other than the one in which the participant's name is listed.

WIOA Scholarship Participant Records:

- 4109877:
 - Need to have the receipts mapped to the payment for tuition and support services.
- 3913332:
 - Case notes need to be cleaned up for accuracy.
 - Measurable skills gain data needs to be entered in i-Trac.
- 2819970:
 - Measurable skills gain data needs to be entered in i-Trac.
 - Credential needs to be entered in i-Trac.
 - Training completion case note needs to be entered.
 - Job search assistance needs to be provided.

Support Service Participant Records:

- 2529652:
 - Upload training completion credential in e-Bridge.
 - Collect and upload support services receipts for 8/2/21 and 4/5/22 services.
- 2392125:
 - Provide back-up document for the 11/19 support service in the amount of \$635.47, current document in e-Bridge is not readable.
- 4108977:
 - Document 12/10/21 support service in i-Trac.
 - Document the 4/27/22 tuition payment in i-Trac.
- 981592:
 - Provide services at least once each 30 days – need to follow up on participant's training progress.
 - Document measurable skills gain.
 - upload supporting documents for 12/10 support service.
- 1457033:
 - Document employment information in i-Trac
- 2364645:
 - Document employment information in i-Trac

OJT Participant Records:

- 49003951:
 - Either correct the 2/1 case note regarding whether or not employment has ended at Cintas.

- If employment has ended, complete the data entry in i-Trac outcomes tab to end the employment record.
- 4101464:
 - Provide documentation to verify that participant started OJT training on or after 7/13 (payroll record indicates pay period starting 7/10).

DWG COVID Participant Records:

- 2518103:
 - See Questioned Cost Section
- 1002967:
 - enter the 2/11 tuition payment for Work Ex in i-Trac payments tab.
- 1902077:
 - The documentation regarding veteran status needs to be corrected – in documentation tab it states customer is not a veteran, DD214 on file provides evidence of veteran status.
- 2557265:
 - The documentation regarding public assistance needs to be corrected – in documentation tab it states customer is not receiving public assistance, the i-Match record indicates customer is on SNAP/ABAWD Exempt.
- 1917755:
 - See Questioned Cost Section
- 2552200:
 - See Questioned Cost Section regarding Upload WorkEx Eligibility and enrollment documents into e-Bridge.
 - Document the \$25 supportive service provided in i-Trac.

DWG Fire Participant Records:

- 2144100:
 - Upload receipt for 3/30 support service into e-Bridge
- 2481470:
 - Correct the scholarship training award documents to the actual or revised award amounts.
 - Document measurable skills gain in i-Trac.
 - Provide an explanation as to why the training period exceeds the one-year limit without LWP approval.
- 2469429:
 - Complete documentation requirements in i-Trac.
- 2497789:
 - Upload the 12/14 support service documents to e-Bridge.
 - The support service provided on 5/20 needs to be documented in i-Trac.
- 498876:
 - Upload the support services documentation provided on 1/4, 11/22, 10/19, to e-Bridge.
 - Document the support services provided on 6/30, 8/8, 10/5 in i-Trac.
 - Collect and upload to e-Bridge the missing support services receipts.
- 2549732:
 - Enter employment information in the outcomes tab in i-Trac.
- 1590872:
 - See Questioned Costs Section
- 2503349:
 - Update the employment status in the outcomes tab in i-Trac.

- 2493196:
 - Update the employment status in the outcomes tab in i-Trac.
 - Document the support service provided on 4/8 in i-Trac.
 - Collect and upload receipts for the support service.
- 2086417:
 - Documentation needs to be completed in i-Trac.
- 2550193:
 - Upload the missing support service receipts to e-Bridge.
 - Provide an explanation and supporting documents for the support service provided on 9/30/21.
- 2558344:
 - Request to have the WorkEx enrollment deleted if customer is not going to be engaged in WorkEx services.
 - Document employment information in outcomes tab in i-Trac.
- 2496274:
 - Document the 8/18 support service in i-Trac and upload the receipt to eBridge.

Work Ex Participant Records:

- 1579866:
 - See Questions Costs Section regarding applications for all fund sources in which customer is enrolled need to be completed both in i-Trac and e-Bridge.
 - The support service for \$507.07 needs to be documented in i-Trac.
- 2211863:
 - Verify customer enrollment status in WorkEx.
- 161601
 - Provide clarification regarding tuition payment.
 - Document 4/20/22 support service provided in i-Trac.



LANE WORKFORCE PARTNERSHIP

Youth Fiscal Monitoring – Lane Education Service District
2021-2022 Desk Review – December 2021

Contract # 31153
Amount \$ 890,000

Lane Education Service District: Dave Standridge, Director of Business, Business Manager and Brianna Vincent, Project Coordinator
LWP: Stephanie Lovell

Written responses to the Lane Workforce Partnership WIOA Youth Fiscal Monitoring Questionnaire were provided by Brianna Vincent, Project Coordinator, and Heidi Larwick, Executive Director, Connected Lane County. The following details were noted:

- Due to the COVID-19 Pandemic Lane ESD expenditures have been lower than expected, both Lane ESD and LWP are monitoring closely.
- In and Out of School Staff Wages/Fringe are allocated based off of customers served monthly. Year-to-date actuals through December 2021 are 26% In-School and 74% Out-of-School. The contract requires a 25% In-School and 75% Out-of-School split.
- Quarterly WEX costs reported based off actual enrollments of youth served In-School or Out-of-School.
- December 2021 WEX expenses reported were 24% of total invoiced costs. The contract states a 20% minimum of total funds to be spent on WEX.
- Documentation of payments made to all Youth participants such as timesheets, corresponding paystubs, and purchases for youth such as supportive services and incentives are required to be uploaded into ebridge and documented in Itrac.
- Payroll records are kept via timesheets. Both employees and supervisors sign timesheets.
- All staff were verified by Anne Nestell, LWP Program Manager and WIOA Youth Customers were verified in eBridge and Itrac by Stephanie Lovell, LWP Accountant.
- Gift cards are used as Incentives, each incentive is documented in I-Trac and eBridge.
- A Federally approved Indirect Cost Rate letter of 9.00% was provided.
- No program revenue was generated.
- Total WIOA In-School and Out-of-School Youth expenditures for December 2021 were detailed in the general ledger provided and match the \$64,190.73 expenditures reimbursed for the period.
- The Lane Education Service District is in its second contract year, LWP is continuing to monitor the following areas: Gift cards/incentive payment processes, documentation both in I-Trac / eBridge and sub-contract fiscal monitoring.
- Lane ESD monitors their subcontractors throughout the year and has provided a letter attesting to their ongoing compliance.

The CAFR including an Independent Auditor's Report prepared by Pauly Rodgers and CO, PC for the year ended 6/30/21 and was provided via PDF. The Schedule of Federal Awards details federal awards with

CFDA numbers for the year ending 06/30/2021. The WIOA funds are detailed as “Passed through Lane Workforce Partnership” and match the amount of funding provided. For the year ended 6/30/21, there were no Findings or Questioned Costs. Additionally, Lane Education Service District Sub-Contractors, Looking Glass Community Services and Bethel School District provided CAFRs including Independent Auditor’s Reports. All included the Schedule of Federal Awards detailing CFDA numbers. All audits were reviewed by LWP and there were no material weakness or audit findings.

Summary prepared by:

Stephanie Lovell

Stephanie Lovell, Accountant
Stephanie@laneworkforce.org

04/22/2022

Date

WIOA YOUTH PROGRAM FILE MONITORING

Connected Lane County Program Year 2021

WIOA Youth Program Provider: Heidi Larwick, Connected Lane County

Date of Report: May 11, 2022

Program Year 2021/2022 Contract Amount: \$890,000

Contract Expenditure Requirement

	BUDGET	PROVIDER REPORTED EXPENDITURES THROUGH 3/31/2022
WIOA Total Youth	\$890,000	\$516,713
WIOA Out of School Youth	\$667,500	\$372,309
WIOA In-School Youth	\$222,500	\$144,404
WIOA Work Experience	\$178,000	\$162,028

Based on the March 2022 Cost Report, Connected Lane County is not meeting the 75% OSY and 25% ISY expenditures requirement. Currently OSY expenditures are 72% (\$372,309) and ISY expenditures are 28% (\$144,404).

Program Year 2021/2022 Contracted Number to Serve: 178

Contract Performance Enrollment Requirement

	Performance Target	Provider Performance
Out of School Youth – no less than	134	147
In School Youth – no more than	44	48
Total Youth Served	178	195

Connected Lane County has exceeded the contracted number to serve with 195 participants. Of the 195 participants receiving services, 75% (147) are OSY and 25% (48) are ISY. Connected Lane County met the priority of maintaining a 75% OSY/25% ISY split as stated in the contract.

Total Participants Included in File Review: 30

See Attachment A List of Participants for the name and I-Trac Number of each file reviewed.

See Attachment B of Records Requiring Corrections. I have also included an excel spreadsheet (Attachment C) that notes observations for each record review and the resolutions required.

Performance Measures:

Connected Lane County is not meeting performance measures and targets as stated in Contract #31153.

Performance Measure	Performance Target	Provider Performance
Education or training activities or employment in the 2 nd quarter	68.6%	48.48%
Education or training activities or employment in the 4 th quarter after exit	61.7%	47.92%
Credential attainment rate	58.4%	28.57%
Measurable skill gains	54.5%	35.59%

Observations:

- Total overall expenditures are below where they should be at this point in the year. Current expenditures are 58% (\$516,713) and should be at a minimum of 75% (\$667,500).
- Work Experience expenditures are above the 20% requirement - currently 31% (\$162,028) of total expenditures.
- Of the 195 participants in the program, there are 38 participants in the 31 – 60 days since last qualifying service and 5 participants in the 61 – 90 days since last qualifying service. It is the expectation of this program that there is on-going communication no less than once every 30 days.

Best Practice Observations:

- Staff have exceeded enrollment goals for the WIOA Youth Program.
- Connected Lane County developed comprehensive Standard Operating Procedures for the WIOA Youth Program.
- Hired a full-time Peer Support Specialist to help support youth who struggle with navigating mental health, psychological trauma, and substance abuse.
- Staff are doing an excellent job with case management.

Monitoring Outcomes Summary:

The WIOA Youth program is being managed well. Participants are being actively case managed, required records are accurate and up-to-date.

Please provide a response by May 31, 2022 regarding the expenditures of funds and your plan to spend out the budget by the end of the program year. Also include a response as to how the program will meet the four performance targets as outlined under Performance Measures.

In addition, please provide corrections to the items listed in Attachment B/Attachment C by May 31, 2022.

Attachment A
List of Participants Reviewed

WIOA Youth Participants	
NAME	I-TRAC NUMBER
Alvarez-Cardoso, Dayanara	2558729
Garcia, Alexis	2498510
Gonzalez, Elizabeth	2492116
Kinkade, Stephen	2493237
Montalvo, Alexzander	2492726
Benham, Ashlee	2569056
Colvin, Moya	2563800
Hagewood, Madeline	2493572
Matney, Selena	2571798
Michel, Jacqueline	2546270
Darcy-Smith, Riley	2571793
Daughs, Isaiah	2565554
Evans, Emily	2550553
Flansberg, Summer	2557608
Gaffer, Logan	2512650
Dickson, Rose	2188434
Hess-Harrison, Kylie	2513735
Ricks, Tandon	2491749
Biehl, Alexander	2492895
Cook, James	2565926

Attachment B
Records Requiring Corrections

WIOA Youth Participant Records:

- 2492116:
 - Needs updated ISP in eBridge
- 2493237:
 - Missing signed Applicant Statement in eBridge
 - Needs updated ISP in eBridge
- 2492726:
 - Missing signed Applicant Statement in eBridge
- 2569056
 - Missing documentation for Support Service expenditure in eBridge
 - Missing ISP in eBridge
 - Missing Initial Assessment for WIOA Youth Mandated Services in eBridge
- 2563800
 - Missing Work Experience documentation in eBridge
- 2493572
 - Needs updated ISP in eBridge
- 2571798
 - Missing ISP in eBridge
 - Missing Initial Assessment for WIOA Youth Mandated Services in eBridge
- 2546270
 - Missing signed Applicant Statement in eBridge
- 2550553
 - I-Trac: Check WEX start date of 10/11/2021 with target end date of 1/11/2022 to see if participant is still doing this WEX
 - Missing signed Applicant Statement in eBridge
- 2557608
 - Last case note was from 3/29/2022 in I-Trac
 - Missing signed Applicant Statement in eBridge
- 2512650
 - Missing signed Applicant Statement in eBridge

- 2513735
 - Missing signed Applicant Statement in eBridge
- 2491749
 - Missing signed Applicant Statement in eBridge
- 2492895
 - Last case note was from 4/5/22 in I-Trac
 - Missing signed Applicant Statement in eBridge
- 2565926
 - Missing Initial Assessment for WIOA Youth Mandated Services in eBridge



YOUTH PROGRAM FILE MONITORING

Final Report 6/8/22

Connected Lane County

Program Year 2021

WIOA Youth Program Provider:

Heidi Larwick, Connected Lane County

Final Report:

On May 11, 2022, Lane Workforce Partnership completed the file monitoring of the WIOA Youth Service Provider contract. Connected Lane County submitted responses to the report on May 19, 2022 and May 31, 2022.

Final Monitoring Results and Resolutions:

Observations:

- Missing documentation in I-Trac and eBridge

Resolution: Contractor has made all requested corrections in both I-Trac and eBridge with the exception of the below:

- 2492895, 2491749, 2550553: staff are continuing to work on obtaining the signed applicant statement and will incorporate processes to ensure collection of required documents at the point of intake.
- 2565926: missing Initial Assessment for WIOA Youth Mandated Services. This youth attempted suicide and has not responded to any communications from the case manager. This has all been documented in the case notes. LWP accepts this document and will waive the initial assessment requirement.

This observation is closed.

- Total expenditures are below expected levels at this point in the year

Resolution: Contractor responded that they anticipate not spending approximately \$41,000 of their contract dollars with the differences being in personnel costs, participant training, and support services. This is largely due to staff turnover this year and the fact that most of the training has been remote and free to attend. This observation is closed.

- Not meeting the 75% OSY and 25% ISY expenditure requirement

Resolution: Contractor responded that they anticipate their spending to be at the 75/25 split by the end of the program year. Planned expenditures include many non-personnel expenses which need to be documented and the majority are for OSY. This observation is closed.

- Not meeting Performance Measure Targets

Resolution: Contractor responded that most of the skills testing takes place in June so they anticipate seeing the numbers improve by the end of the program year. This observation is closed pending final contract performance outcomes.



LANE WORKFORCE PARTNERSHIP

Youth Fiscal Monitoring –Lane County DYS
2021-2022 Desk Review – December, 2021

Contract #31151
Amount \$50,000

Lane County DYS: Seth Tilton, Accounting Analyst
LWP: Stephanie Lovell

Written responses to the Lane Workforce Partnership WIOA Youth Fiscal Monitoring Questionnaire were provided by Seth Tilton and Shellye Reynoso. The following details were noted:

- Payroll records are kept via Peoplesoft Timecard Entry. Both employees and supervisors sign timesheets.
- As of December, 2021, expenditures were at 43% of the total budget. Lane Youth is late invoicing for participant WEX wages paid in prior months. All costs, including accrued cost are to be invoiced monthly. Lane County DYS and LWP are monitoring closely.
- In and Out of School Staff Wages/Fringe are allocated based off of customers served monthly. Year-to-date actuals through December, 2021 are 24% In-School and 76% Out-of-School. The contract requires a 25% In-School and 75% Out-of-School split.
- Quarterly WEX costs are determined based off customers served, both In School and Out of School actuals.
- December 2021 WEX expenses reported were only 2% of total invoiced costs, this is well below the 20% requirement. Lane County DYS has been late invoicing LWP for wages paid to WEX participants, additionally, there is a plan for two additional internships this spring. Lane County DYS and LWP are monitoring closely.
- All staff were verified by Anne Nestell, LWP Program Manager and WIOA Youth Customers were verified in both Itrac and eBridge by Stephanie Lovell, LWP Accountant.
- Gift cards are not used as incentives by Lane County DYS.
- Lane County does not charge an indirect rate to this contract.
- No program revenue was generated.
- Total WIOA In-School and Out-of-School Youth expenditures for December, 2021 were detailed in the general ledger provided and match the \$1,549.70 expenditures reimbursed for the period.

The CAFR including an Independent Auditor’s Report prepared by Moss Adams, LLP for the year ended 6/30/21 was provided electronically. The WIOA Youth funds are detailed as “Passed through Lane Workforce Partnership” and match the amount of funding provided. For the year ended 6/30/21, there were no Findings or Questioned Costs. Summary prepared by:

Stephanie Lovell, Accountant
Stephanie@laneworkforce.org

06/16/2022

Date



YOUTH PROGRAM FILE MONITORING

Final Report 6/8/22

Lane County Youth Services

Program Year 2021

WIOA Youth Program Provider:

Shellye Reynoso, Lane County Department of Youth Services

Final Report:

On May 10, 2022, Lane Workforce Partnership completed the file monitoring of the WIOA Youth Service Provider contract. Lane County Youth Services submitted responses to the report on May 12, 2022 and May 27, 2022.

Final Monitoring Results and Resolutions:

Concerning Observations:

- Total expenditures are below expected levels at this point in the year and Work Experience expenditures are below the 20% requirement

Resolution: Contractor responded that they are in line to spend down the budget and the 20% work experience requirement by the end of the program year. Contractor believes they will meet the 75% OSY/25% ISY expenditure split by the end of the program year. They are currently working on their May expenditures and the June forecast and will share numbers to support the spend down as soon as they are available. Lane County Youth Services currently has two youth in work experiences and as of May 27, are working on a third placement. This observation is closed pending supporting documentation regarding expenditures.

- # Days since last qualifying service

Resolution: Contractor has provided a qualifying service to the four participants who were in the 31 – 60 days since last qualifying service. In addition, the Contractor understands that it is the expectation of this program that there is on-going communication no less than once every 30 days. This observation is closed.

- Missing documentation in I-Trac and eBridge and data not being entered consistently

Resolution: Contractor has made all requested corrections in both I-Trac and eBridge and will incorporate processes to ensure collection of required documents at the point of intake. There was some confusion on the Contractor's part as to where unsubsidized employment data was to be entered into I-Trac. Contractor now knows to enter unsubsidized employment under Outcomes in I-Trac and subsidized employment under Services/Work Based Training in I-Trac. Additionally, contractor will ensure work based training is case noted with all pertinent information. This observation is closed.



LANE WORKFORCE PARTNERSHIP

Youth Fiscal Monitoring – Marcola School District
2021-2022 Desk Review – December 2021

Contract # 31152
Amount \$ 60,000

Marcola School District: Adrienne D 'Addabbo, Business Manager
LWP: Stephanie Lovell

Written responses to the Lane Workforce Partnership WIOA Youth Fiscal Monitoring Questionnaire were provided by Adrienne D 'Addabbo and David Ledbetter. The following details were noted:

- Payroll records are kept in Frontline. Both employees and supervisors digitally sign timesheets.
- Youth WEX costs are well below the required contract amount of 20%, Marcola WIOA youth participants were either already gainfully employed, have vaccine hesitancy and/or immunodeficiency issues preventing participants from engagement in the work experience, this has caused a significant variance from contract to budget. At the time of monitoring Marcola had indicated that there are two participants in different stages of a work experiences. LWP is monitoring this with Marcola School District.
- In and Out of school costs are direct costs and determined by actual enrollments, staff costs are billed based off of timecards according to hours billed for youth enrollment designation to In or Out of school. Year to date actuals through December 2021 for In-School are 24% and Out-of-School 76%.
- Quarterly WEX costs are reported based off of work experience and classroom training. Salary costs are divided accordingly between in-school and out-of-school, 25/75. As of December, 2021 WEX, costs were at 11% of the total budget spent. LWP and Marcola is monitoring this closely.
- All staff were verified by Anne Nestell, LWP Program Manager and WIOA Youth Customers were verified in eBridge and Itrac by Stephanie Lovell, LWP Accountant.
- Gift cards are not used as Incentives by Marcola School District.
- An indirect cost rate is not charged for grants.
- No program revenue was generated.
- Total WIOA In-School and Out-of-School Youth expenditures for December 2021 were detailed in the general ledger provided and match the \$2,975.43 expenditures reimbursed for the period.

The CAFR including an Independent Auditor's Report prepared by Pauly, Rodger and Co., P.C., for the year ended 6/30/21 and was provided via PDF. The Schedule of Federal Awards details all federal awards with CFDA numbers. The WIOA funds are detailed as "Passed through Lane Workforce Partnership" and match the amount of funding provided. For the year ended 6/30/21, there were no findings or questioned costs.

Summary prepared by:

Stephanie Lovell

Stephanie Lovell, Accountant
Stephanie@laneworkforce.org

04/12/2022

Date



YOUTH PROGRAM FILE MONITORING

Final Report 6/8/22

Marcola School District

Program Year 2021

WIOA Youth Program Provider:

David Ledbetter, Marcola School District

Final Report:

On May 11, 2022, Lane Workforce Partnership completed the file monitoring of the WIOA Youth Service Provider contract. Marcola School District submitted responses to the report on May 31, 2022 and June 1, 2022.

Final Monitoring Results and Resolutions:

Concerning Observations:

- Total expenditures are below expected levels at this point in the year and Work Experience expenditures are below the 20% requirement

Resolution: On May 25, 2022, LWP approved moving \$1,100 from staff training/travel to participant support services as there is a greater need for support service dollars. Marcola has had a difficult time this year with work experience placements due to extenuating circumstances in the personal lives of the participants. They currently have two work experiences going with a third placement happening within the week. Staff wages/fringe and work experiences represent the largest line items to spend down before the end of the program year. This observation is closed pending final contract expenditures.

- # Days since last qualifying service

Resolution: Contractor has provided a qualifying service to those that were in the 61 – 90 days since last qualifying service. In addition, the Contractor understands that it is the expectation of this program that there is on-going communication no less than once every 30 days. This observation is closed.

- Missing documentation in I-Trac and eBridge

Resolution: Contractor has made some of the requested corrections in both I-Trac and eBridge. Below are corrections that still need to be made.

- 2366156: Still missing updated ISP in eBridge and there are still corrections needed for entry descriptions in eBridge.
- 2249589: Still missing updated ISP in eBridge
- 2120364: Still missing WEX information at Two Birds Yoga Training and services are still open in I-Trac. Still missing updated ISP in eBridge.
- 2219188: Still missing updated ISP in eBridge.
- 2118083: There are still open services in I-Trac. There is confirmation from the participant regarding an updated ISP but the updated document has not been put into eBridge.
- 2273536: Still missing updated ISP in eBridge.
- 2501521: Still missing date of birth documentation in eBridge.
- 2262113: There are still open services in I-Trac.

This observation is closed pending confirmation that all corrections have been made in I-Trac and eBridge.

**PROPOSED BUDGET MODIFICATION #1
2022-2023**

RECOMMENDATION

To adopt the General Operating Budget Modification #1 as presented.

BACKGROUND

Lane Workforce Partnership (LWP) annually prepares Modification 1 to the Adopted Operating Budget to record actual carry-over from the previous year and to add additional revenue sources, if necessary. The discussion below and attached details represent an overall increase of \$586,490 in additional revenues.

DISCUSSION

REVENUE:

Revenue increased from \$9,547,857 by 6% \$586,490 to \$10,134,347.

Revenue increase is due to the award of a Regional Good Jobs Challenge Grant from the US Department of Commerce for the Driving Prosperity Program. LWP will receive \$896,873 through our partnership with Southwestern Oregon Workforce Investment Board (SOWIB).

Revenue decreased by (\$256,691) in our WIOA Formula Funds based on the final allocation from the State of Oregon and lower than anticipated carry forward from our sub-recipients.

The specific revenue changes are detailed on the attached schedule.

EXPENSE:

Total expenses have increased from \$6,693,595 by 5% \$355,542 to \$7,049,137.

The Reserve for Future Expenditures increased from \$2,747,262 to \$2,978,210 with the specific details included on our new Revenue and Expense Summary by Fund.

Personnel Services are 14% of annual expenses. The total expense is down (\$21,802) due to final benefit cost amounts.

Materials and Services are 4% of annual expenses.

Community Investments are the amounts directly attributed to the provision of workforce services to the population of Lane County. LWP has budgeted 82% of total expenses in the pursuit of a trained workforce of individuals with the knowledge and skills needed for career success. The major changes in this Budget Modification are:

- ITRAC Subscription increased from \$35,565 to \$44,900 – actual amount for annual data management contract with Worksystems, Inc for required performance tracking of WIOA Adult, Youth, Dislocated Workers, State General Fund WorkEx and Prosperity 10,000 enrollees.
- WIOA Adult, Dislocated Worker, Dislocated Worker Emergency and State of Oregon General Funds decreased from \$1,631,960 by \$79,644 to \$1,552,316. The decrease is due to the actual balances remaining in funds carrying over from 2021-2022.
- WIOA Youth and Oregon Youth Employment Program decreased from \$1,485,722 by \$82,000 to \$1,403,722.
 - Due to the reduction in WIOA Youth Formula Funds allocated to Lane County from the State of Oregon, we made the difficult decision to end our contracts with Marcola School District and Lane County Youth Services effective October 31, 2022. The participants will be transitioned to Connected Lane County. The reduction gives us just \$81,508 in carry forward.
- Good Jobs – Driving Prosperity: Provide 100 trainees over the next two years in Lane County the opportunity to earn a Commercial Driver’s License and be connected to a network of employers for immediate hire. Project will also fund a Sector Strategist position to coordinate and manage the system in Lane County.
- Prosperity 10,000: Overall investments aligned with timing of the release of the federal ARPA portion of the award.

REVENUE AND EXPENSE SUMMARY BY FUND:

New report showing the allocation of expenses by each revenue stream.

Lane Workforce Partnership

1401 Willamette Street, Second Floor
Eugene, Oregon 97401

Revenue

Title	2022-23 Original Adopted	2022-2023 Adjusted	Difference
<u>Workforce Innovation and Opportunity Act (WIOA) Funds</u>			
WIOA Adults	\$ 1,099,344	\$ 1,026,132	\$ (73,212)
WIOA Youth	\$ 1,165,108	\$ 1,052,559	\$ (112,549)
WIOA Dislocated Worker	\$ 760,420	\$ 711,484	\$ (48,936)
WIOA RR/Layoff Aversion SHINE	\$ -	\$ -	\$ -
WIOA DWG COVID Disaster & Employment	\$ -	\$ -	\$ -
WIOA DWG Fire Restoration and Recovery	\$ 515,000	\$ 498,644	\$ (16,356)
WIOA Administration	\$ 309,877	\$ 304,238	\$ (5,639)
Subtotal	\$ 3,849,748	\$ 3,593,057	\$ (256,691)
<u>Other:</u>			
General Fund Work Experience	\$ 267,900	\$ 221,420	\$ (46,480)
Industry Engagement	\$ 110,000	\$ 108,458	\$ (1,542)
Competitiveness Strategies	\$ 79,000	\$ 73,330	\$ (5,670)
CTE Revitalization (Lane ESD & Lane County)	\$ 195,000	\$ 195,000	\$ -
Oregon Youth Employment Program	\$ 577,914	\$ 577,914	\$ -
Good Jobs - Driving Prosperity (SOWIB)	\$ -	\$ 896,873	\$ 896,873
Oregon Health Authority - HOWTO Grant	\$ 999,956	\$ 999,956	\$ -
<u>Prosperity 10,000 Future Ready Oregon:</u>			
State of Oregon General Funds	\$ 1,220,359	\$ 1,220,359	\$ -
Federal ARPA	\$ 1,427,320	\$ 1,427,320	\$ -
Federal ARPA - Navigators	\$ 713,660	\$ 713,660	\$ -
Subtotal:	\$ 5,591,109	\$ 6,434,290	\$ 843,181
Revenue Total:	\$ 9,440,857	\$ 10,027,347	\$ 586,490
<u>Contingency Reserves:</u>			
Non-Federal Contingency Reserve:	\$ 107,000	\$ 107,000	\$ -
Total All Sources:	\$ 9,547,857	\$ 10,134,347	\$ 586,490

Lane Workforce Partnership

1401 Willamette Street, Second Floor

Eugene, Oregon 97401

	2022-2023 Original Adopted	2022-2023 Original Adjusted	Difference
Line Item			
Personnel Services			
Staff Salaries/Taxes/Fringe-All	\$ 1,022,056	\$ 1,000,254	
TOTAL Personnel FTE = 7.2	1,022,056	1,000,254	(21,802)
Materials & Services			
Subscriptions	550	600	50
Legal Notices	1,250	1,000	(250)
Taxes, Audits and Legal Services	29,250	31,250	2,000
Telephone Services	7,200	7,200	-
Purchased Insurance	26,000	26,000	-
Real Estate and Parking	35,964	35,964	-
Copier Charges	2,188	2,188	-
Data Warehousing and Storage	3,700	3,700	-
General Office Expenses	20,000	20,000	-
Memberships	11,900	14,550	2,650
Printing	500	500	-
Program Information and Outreach	22,500	22,500	-
Postage	500	250	(250)
Computer Equipment and Supplies	50,000	50,000	-
Business Meetings and Travel Expenses	25,000	25,000	-
Board Expenses	15,000	25,000	10,000
Professional Development - Staff	35,000	35,000	-
Capital Outlays	-	-	-
TOTAL M&S	286,502	300,702	14,200
Community Investments			
One Stop Operations	40,372	40,372	-
ITRAC Subscription	35,565	44,900	9,335
Subcontracts - Adult/DW/DWG	1,440,210	1,392,384	(47,826)
Subcontracts - State of OR GF Work Exp	191,750	159,932	(31,818)
Subcontracts - Youth	1,000,000	918,000	(82,000)
Subcontracts - OYEP	485,722	485,722	-
Subcontracts - Onward Eugene	250,000	250,000	-
Subcontracts - Good Jobs - Driving Prosperity	-	750,000	750,000
Subcontracts - HOWTO - Nurturely	318,592	318,592	-
Other Industry Engagement (Sectors)	50,000	108,458	58,458
Subcontracts - Prosperity 10,000	1,572,826	1,279,821	(293,005)
	-	-	-
TOTAL Direct Program Services:	5,385,037	5,748,181	363,144
Total Current Expenses	6,693,595	7,049,137	355,542
Reserved For Future Expenditure:	2,747,262	2,978,210	230,948
Non-Federal Contingency Reserve:	107,000	107,000	-
Match to Revenue Total:	9,547,857	10,134,347	586,490

Lane Workforce Partnership

1401 Willamette Street, Second Floor
Eugene, Oregon 97401

Revenue and Expense Summary by Fund

Title	Revenue	Personnel Expenses	Materials & Supplies	Community Investments	Reserve for Future Expenditures
Workforce Innovation and Opportunity Act (WIOA) Funds					
WIOA Adults	\$ 1,026,132	\$ 127,870	\$ 29,661	\$ 741,172	\$ 127,430
WIOA Youth	\$ 1,052,559	\$ 32,051	\$ 14,183	\$ 924,817	\$ 81,508
WIOA Dislocated Worker	\$ 711,484	\$ 91,921	\$ 22,166	\$ 496,976	\$ 100,421
WIOA DWG Fire Restoration and Recovery	\$ 498,644	\$ 29,165	\$ 7,366	\$ 462,312	\$ (200)
WIOA Administration	\$ 304,238	\$ 177,712	\$ 78,397	\$ 3,000	\$ 45,129
Subtotal:	\$ 3,593,057	\$ 458,719	\$ 151,772	\$ 2,628,277	\$ 354,288
Other:					
General Fund Work Experience	\$ 221,420	\$ 45,198	\$ 11,485	\$ 164,490	\$ 247
Industry Engagement	\$ 108,458	\$ -	\$ -	\$ 108,458	\$ -
Competitiveness Strategies	\$ 73,330	\$ 53,193	\$ 18,983	\$ -	\$ 1,154
CTE Revitalization (Lane ESD & Lane County)	\$ 195,000	\$ 144,636	\$ 30,666	\$ -	\$ 19,699
Oregon Youth Employment Program	\$ 577,914	\$ 68,002	\$ 16,216	\$ 490,862	\$ 2,834
Good Jobs - Driving Prosperity (SOWIB)	\$ 896,873	\$ 29,165	\$ 8,763	\$ 750,000	\$ 108,944
Oregon Health Authority - HOWTO Grant	\$ 999,956	\$ 8,057	\$ 1,884	\$ 320,992	\$ 669,023
Prosperity 10,000 Future Ready Oregon:					
State of Oregon General Funds	\$ 1,220,359	\$ 145,211	\$ 47,726	\$ 1,025,102	\$ 2,320
Federal ARPA	\$ 1,427,320	\$ 48,072	\$ 13,208	\$ 260,000	\$ 1,106,040
Federal ARPA - Navigators	\$ 713,660	\$ -	\$ -	\$ -	\$ 713,660
Subtotal:	\$ 6,434,290	\$ 541,535	\$ 148,930	\$ 3,119,904	\$ 2,623,921
Total:	\$ 10,027,347	\$ 1,000,254	\$ 300,702	\$ 5,748,181	\$ 2,978,210
Contingency Reserves:					
Non-Federal Contingency Reserve:	\$ 107,000				\$ 107,000
Total All Sources:	\$ 10,134,347	\$ 1,000,254	\$ 300,702	\$ 5,748,181	\$ 3,085,210



ROLE OF THE BOARD

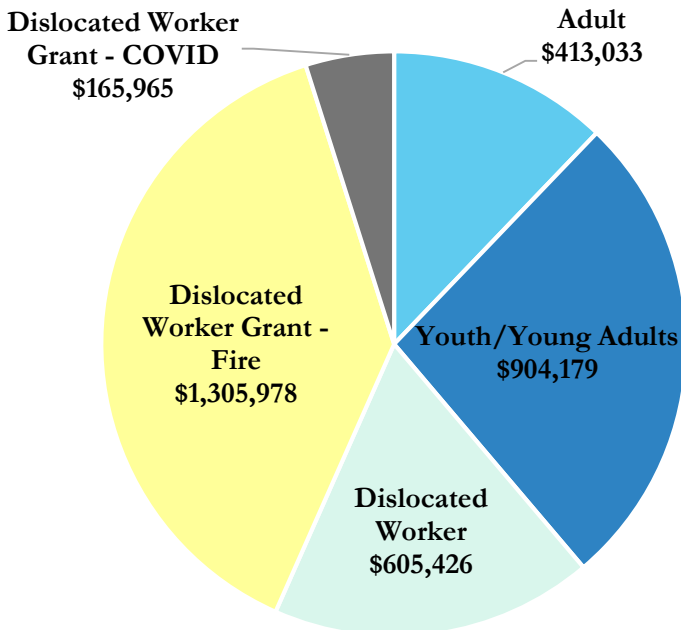
- **Convener:** Bringing together business, labor, education, and economic development to focus on workforce issues and promote strategic alignment.
- **Workforce Analyst:** Developing, disseminating, and assisting with the analysis of current labor market and economic information and trends in industry sectors.
- **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.

OUR GOALS

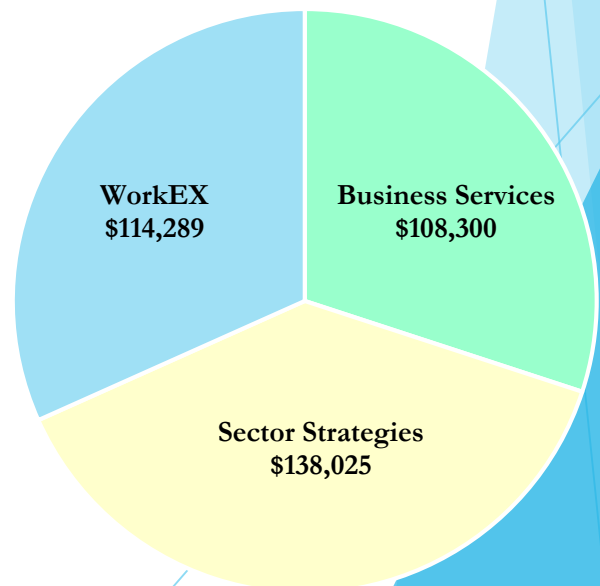
- Prepare workers for self-sufficiency employment in a new and changing economy.
- Connect individuals to education, skill-building, & employment opportunities in occupations most impacted.
- Prepare our youth for future employment.
- Catalyze the community around diversity, equity and inclusion (DEI) to expand workforce leadership & participation opportunities for all.
- Align strategic partnerships to expand our collective capacity to address systemic workforce challenges.

INVESTMENTS

Workforce Innovation and Opportunity Act Funds
\$3,394,581



Business Services and Layoff Aversion Funds
\$360,614



Workforce Innovation and Opportunity Act Funds - \$3,394,581

Adult and Dislocated Worker

Individuals Served at WorkSource Lane

- 7,105 received personalized services to support their job search
- 58 completed On-The-Job Training
- 44 were awarded training scholarships
- 88 job seekers placed in targeted industries

Employer Engagement at WorkSource Lane

- 100% of employers were very satisfied with the individuals they hired through services at WorkSource Lane
- 880 positions posted on iMatchSkills in targeted sectors
- 8 new businesses utilized the OJT program

Dislocated Worker Grant - Fire

- 126 people were provided Career Services
- 29 people were employed in humanitarian or fire restoration and cleanup work

Dislocated Worker Grant - COVID

- 148 people were provided Career Services
- 5 people were employed in humanitarian work

Youth/Young Adults

- 233 youth served
- 43 participated in a work experience
- 8 completed an internship with occupational skill gains and achieved positive evaluations
- 29 participated in Financial Foundation courses

Business Services and Sector Strategies - \$360,614

Sector Strategies - \$138,025

- Discard Upcycling (Creatives) - \$76,800
- Bohemia Food Hub (Food & Beverage) - \$25,000
- Season to Taste (Food & Beverage) - \$15,000
- Technology Association of Oregon - \$10,200
- Open for Business (Chamber Publication) - \$4,600
- Luna Jimenez Centering Relationships - \$4,225
- Leading with Cultural Intelligence (TAO) - \$2,200

WorkEX – State of Oregon General Fund Work Experience - \$114,289

- 21 Received On-the-Job Training Opportunities
- 14 Received Training Scholarships
- 8 Received Adult Work Experience Opportunities

Business Services - \$108,300

- Working with Onward Eugene connecting the workforce with industry opportunities, activating the entrepreneurial ecosystem, and developing a strategy to bring Lane County businesses effective layoff aversion services includes On-the-Job Training (OJT).
- Expansion of business services to 575 businesses resulting in 19 OJTs.