



LANE WORKFORCE PARTNERSHIP EXECUTIVE BOARD MEETING
Thursday, September 21, 2023
11:30am – 1:00pm

Meeting being held in-person and via Zoom

In-Person: 1401 Willamette Street, Eugene (Eugene Chamber Building)
(2nd Floor, LWP Conference Room)

Zoom Meeting

<https://us02web.zoom.us/j/8428428857>

Meeting ID: 842 842 8857

AGENDA

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

- I. CALL TO ORDER / *Shondra Holliday*
- 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 18th, 2023, Executive Board Meeting / Action* Pages 1 - 5
 - *Minutes of the June 15th, 2023, Lane Council Meeting / Action* Pages 6 - 7
- IV. WIOA SUB-RECIPIENT FINANCE MONITORING / *Information* Pages 8 - 48
Tiffany Cink, Lane Workforce Partnership
- V. LWP LOCAL STRATEGIC PLAN 2024 – 2028 / *Information* Pages 49 - 51
Cindy Perry, Lane Workforce Partnership
- VI. LWP YEAR-END PERFORMANCE REPORT / *Information* Pages 52 - 76
Cindy Perry, Lane Workforce Partnership
- VII. EXECUTIVE DIRECTOR’S REPORT / *Information*
Ashley Espinoza, Lane Workforce Partnership
- VIII. EXECUTIVE BOARD MEMBER UPDATES / *Information*
- IX. OTHER BUSINESS
- X. ADJOURNMENT

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LANE WORKFORCE EXECUTIVE BOARD MEETING

Thursday, May 18, 2023

11:30am – 1:00pm

MINUTES

In Attendance: Shondra Holliday, Solomon Harris, Stan Pickett, Heather Buch, Mike Clark, Michelle Webber, Dana Merryday
Absent: Jennifer Adams
Staff: Ashley Espinoza, Tiffany Cink, Cindy Perry, Stephanie Lovell, Lyle Lang

Recommendation	Motion	Seconded	Status
Approve Executive Board Meeting Minutes, April 20, 2023	Michelle Webber	Dana Merryday	Approved
Approve Program Year 2023 – 2024 General Operating Budget	Solomon Harris	Michelle Webber	Approved

I. CALL TO ORDER

Shondra Holliday called the meeting to order.

II. PUBLIC COMMENT

There was no public comment.

III. CONSENT CALENDAR

Michelle Webber made a motion to approve the April 20, 2023, Executive Board meeting minutes. Dana Merryday seconded and the motion was approved.

IV. PROGRAM YEAR 2023 – 2024 GENERAL OPERATING BUDGET

Tiffany Cink provided an overview of the budgeting process at Lane Workforce Partnership, where the original budget is prepared annually for final approval by the LWP Executive Board in May. This is followed by Budget Modification #1 in September/October to finalize revenue allocations and carry-forwards.

Comparing to the 2022 – 2023 Modification #1, there was a revenue decrease of \$2,792,753 (\$10,027,347 to \$7,234,593). Notably, 53% of this reduction can be attributed to the State of Oregon Future Ready Oregon Prosperity 10,000 one-year funding allotment. The State of Oregon General Funds were awarded and made available in May 2022 with an expiration date of June 30, 2023. The Future Ready Oregon Prosperity 10,000 program has continued funding with Federal American Rescue Plan Act (ARPA) with spending allowed until June 30, 2026.

For the Federal Department of Labor Workforce Innovation and Opportunity Act (WIOA) Program Year 2023 – 2024, the formula allocations for Oregon published on April 23rd, 2023, saw a decrease across all categories (WIOA Adult, Dislocated Worker, Youth). This overall decrease exceeded 8%, compared to the previous decrease of 5.5% in 2022 – 2023. These annual reductions in WIOA Formula Funds affect essential programs for Adult, Dislocated Worker, and Youth, prompting LWP to explore diversified funding sources to mitigate formula-induced fluctuations.

Additionally, state general fund programs such as General Fund Work Experience, Industry Engagement, Workforce Strategies, and the Oregon Youth Employment Program (OYEP) are funded through the state biennium budget, with flat funding anticipated for the 2023 – 2025 period.

Total expenses saw a decrease of \$1,169,618, reducing the amount from \$7,049,137 to \$5,879,519. The reserve for Future Expenditures also diminished by \$1,623,136, now standing at \$1,355,074. This reserve will support ongoing endeavors in State General Funds, the HOWTO Grant, and the remaining ARPA portion of Prosperity 10,000. Moreover, it will fund existing WIOA Adult, Dislocated Worker, and Youth programs during the months of July, August, and September 2024.

Personnel Services represent 20% of annual expenses, encompassing nine positions (8.2 FTE) and an annual budget including benefits amounting to \$1,164,503.

Materials and Supplies account for \$335,447, equivalent to 6% of annual expenses. This category encompasses non-personnel costs linked to the office and personnel at 1401 Willamette Street, and expenses tied to the Lane Workforce Partnership Board of Directors.

Community Investments, totaling 74% of overall expenses, are directly allocated to provide workforce services for Lane County residents. The objective is to cultivate a skilled workforce equipped with the knowledge and skills/capabilities required for successful careers.

Regarding the impact of cuts to the WIOA Adult, Dislocated Worker, and Youth programs, Stan Pickett inquired about their repercussions. In response, Ms. Cink noted that evaluating these cuts is challenging, especially in terms of the staff positions funded for these programs. Efforts to mitigate the impact include refraining from funding certain vacant positions. Ashley Espinoza highlighted ongoing discussions with partners to foster collaboration and ensure the continuity of services for the community.

Solomon Harris made a motion to adopt the Original Operating Budget for 2023 – 2024 as presented. Michelle Webber seconded and the motion was approved.

V. HECC/OWI FINAL MONITORING REPORT

Tiffany Cink delivered an overview. Annually, the State of Oregon conducts monitoring, primarily directed at federal compliance. Ms. Cink reported that once again this year, our monitoring yielded positive outcomes, requiring no further actions on this agenda item.

VI. EXECUTIVE DIRECTOR'S REPORT

Ashley Espinoza provided a summary.

- Jennifer Adams, LWP Board Chair, and Ashley Espinoza met with all nine prospective board members vying for the five open positions. These positions consist of four representatives from the business sector and one from a community-based organization. A recommendation resulting from these discussions will be presented to the Lane Workforce Council for their consideration during the meeting scheduled for June 15th, 2023. The newly appointed board members will serve a three-year term beginning July 1, 2023.
- LWP staff remains integral partners/collaborators in both statewide and local initiatives, actively contributing to the enhancement and collaborative development of a more accessible, streamlined, and recognized public workforce system.
- Ms. Espinoza holds a position on the Board of Directors for Connected Lane County, where she presently serves as co-chair of a subcommittee dedicated to refining the profile of a K – 12 graduate. This subcommittee is actively engaged in assessing the extent of students' exposure and identifying areas of deficiency. Inquiries have been directed towards both community and industry partners, encompassing:
 - How can youth demonstrate their aptitude?
 - What mechanisms do employers use to access and provide evaluative input?
 - In instances where gaps or opportunities for additional growth are identified, to what extent are employers willing and capable of assisting an employee or candidate, particularly within a competitive labor landscape?

Ms. Holliday shared an exciting collaboration between Lane County Medical Society, Connected Lane County, and Lane Community College. A comprehensive day of training is scheduled for late June, targeting individuals currently in entry-level roles within medical practices, as well as those wanting to venture into the medical field. The anticipated participants include approximately 30 students from Connected Lane County and 15 to 20 current medical practice employees. Lane Community College will oversee the facilitation of this training session. This initiative originated from discussion Lane County Medical Society was having with their employers regarding the skill gaps identified within their workforce.

Dana Merryday inquired about specifics of the Elevate, Navigate, and Spark programs offered by Connected Lane County. In response, Ms. Espinoza shared that Elevate is a program that empowers youth and educators by creating meaningful connections with industry partners. It has a proven track record of providing opportunities that lead to post-secondary success and high-wage, high-demand jobs. Navigate is a program that offers a variety of support services to youth facing significant barriers to success. LWP supports this program through our WIOA funding. Services include support for education, career goals, financial stability, employment, and more. Spark is a program that brings community, education, and industry together through hands-on learning. Ms. Espinoza emphasized that the preliminary visual aid presented in the packet is just a starting point and more specific information will be added to the visual aid throughout the ongoing process.

- Connected Lane County invites you to join them at Spark at Booth Kelley in Springfield on Friday, June 9th from 4:00pm – 6:00pm for a donor appreciation event.
- Future Ready Oregon Round 2 will be coming out shortly presenting an opportunity to secure funding of up to \$35 million for community-based organizations and workforce

service providers. These funds are earmarked for education and training initiatives in critical sectors of Oregon's economy. The application deadline is June 23 and LWP will be applying.

- The Eugene-Springfield Lane Leaders group has been active this year in the realm of workforce development. One of the initiatives brought forward is the introduction of Oregon Tradeswomen to Lane County. With a proven track record of over 30 years in delivering effective pre-apprenticeship training in the Portland region, Oregon Tradeswomen is expanding to Lane County. This program is scheduled to start in July and conclude in September. Local businesses and organizations are invited to contribute to the program's success by offering their support in various capacities such as guest speakers, field trips, mock interviews, and mentorship. Please share this opportunity across your networks.
- Ms. Espinoza encouraged everyone to engage in the upcoming LWP board training scheduled for May 25th, facilitated by the consulting team from the Center for Workforce Excellence International (CWEI).
- Tomorrow at noon, a groundbreaking ceremony will take place at Lane Community College for the Lane Industry and Trades Education Center (ITEC). All are invited to attend this event.

VII. EXECUTIVE BOARD MEMBER UPDATES

- Shondra Holliday (Lane County Medical Society): Ms. Holliday shared that in addition to the training mentioned earlier, Lane County Medical Society is working with Oregon Medical Education Foundation to bolster the mentorship program.
- Heather Buch (Lane County Board of Commissioners): Ms. Buch stated that the county is currently in the midst of its budgetary process which is anticipated to conclude within the next couple of weeks. This year's budget is notably more constrained compared to previous years, reflecting a readjustment in funding priorities.
- Mike Clark (Councilor, City of Eugene): Mr. Clark stated that the City of Eugene underwent a significant budgetary shift this year by transitioning from annual budgets to biennium budgets. As the new budget cycle commenced, the city was confronted with a budgetary deficit of \$20 million. In response, Eugene managers have formulated a budget proposal aimed at implementing comprehensive reductions across all sectors. Mr. Clark and others on the Eugene Council are taking steps to amend some of the proposed reductions. It is a difficult but interesting process. Additionally, Mr. Clark shared that the Eugene-Springfield Fire Department will begin its apprenticeship program within the upcoming months. Ms. Espinoza indicated that LWP has engaged and established connections with the parties involved.
- Dana Merryday (Councilor, City of Cottage Grove): Mr. Merryday mentioned that Cottage Grove is also currently in the midst of its budget cycle. The city's overall financial status appears satisfactory across numerous areas. However, there is a significant backlog of unfunded improvement projects, requiring a total of \$78 million to bring them up to the

desired standards. The condition of the roads has led to the formation of an ad-hoc committee tasked with exploring various funding options. Considerable portions of the American Rescue Plan Act (ARPA) funds have been utilized to establish programs aimed at assisting the unhoused population. While there is funding allocated in the current budget cycle for these programs, there are no provisions for future cycles unless the State allocates additional financial support. Regarding workforce efforts, Cottage Grove has initiated a practice of hiring high school students for summer internships.

- Michelle Webber (Councilor, City of Springfield): Ms. Weber conveyed her enthusiasm about the arrival of Spark to Springfield, expressing excitement for the collaborative opportunities that lie ahead.
- Solomon Harris (CEI Coatings): Mr. Harris mentioned that his company has collaborated with Connected Lane County to provide opportunities for job shadowing.
- Stan Pickett (Delta Sand & Gravel): Mr. Pickett reported a positive outcome resulting from grant funding provided by LWP. Specifically, the company has successfully trained five new CDL drivers into their workforce who are now actively operating on the road. Additionally, efforts are underway to further enhance the skills of existing employees, with a focus on training in equipment operation and concrete finishing.

VIII. OTHER BUSINESS

Since this marks Stan Pickett's final meeting as an Executive Board Member, Lyle Lang and the LWP team took the opportunity to acknowledge Mr. Pickett. They commended his tremendous contributions in the construction, aggregate, and transportation realms, as well as his steadfast dedication to working with youth. Mr. Pickett has been a true industry champion.

IX. ADJOURNMENT

Shondra Holliday adjourned the meeting.



LANE WORKFORCE COUNCIL MEETING
Thursday, June 15th, 2023
1:00pm – 1:30pm

MINUTES

In Attendance: Heather Buch, Dana Merryday, Michelle Webber
Absent: Mike Clark
Staff: Ashley Espinoza, Anne Nestell

Recommendation	Motion	Seconded	Status
Re-appoint Jennifer Adams, Bettina Hannigan, Solomon Harris, Phil Hohnstein, Shondra Holliday, Bailey McEuen, Sarah Means, and Stan Pickett to the Lane Workforce Partnership Board of Directors for an additional three-year term beginning July 1, 2023	Michelle Webber	Dana Merryday	Approved
Appoint Billy Dover, Jeff Graham, Courtney Griesel, John Stapleton, and Steve Yamamori to the Lane Workforce Partnership Board of Directors for a three-year term beginning July 1, 2023	Michelle Webber	Dana Merryday	Approved

I. CALL TO ORDER

Heather Buch called the meeting to order.

II. PUBLIC COMMENT

There was no public comment.

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

Michelle Webber made a motion to re-appoint Jennifer Adams, Bettina Hannigan, Solomon Harris, Phil Hohnstein, Shondra Holliday, Bailey McEuen, Sarah Means, and Stan Pickett to the Lane Workforce Partnership Board of Directors for an additional three-year term beginning July 1, 2023. Dana Merryday seconded, and the motion was unanimously passed.

IV. APPOINTMENT OF NEW LANE WORKFORCE BOARD MEMBERS

Michelle Webber made a motion to appoint Billy Dover, Jeff Graham, Courtney Griesel, John Stapleton, and Steve Yamamori to the Lane Workforce Partnership Board of Directors for a three-year term beginning July 1, 2023. Dana Merryday seconded, and the motion was unanimously passed.

V. LANE COUNCIL MEMBER UPDATES

Heather Buch shared that the Lane County Board of Commissioners approved Lane County's budget of \$1.1B this past Tuesday.

Dana Merryday shared that Matt Sayre with Collaborative EDO came to Cottage Grove this past Tuesday and met with Faye Stewart and Mr. Merryday. This was an outgrowth of the recent LWP board training Mr. Merryday attended. They had a great discussion about possibilities for Cottage Grove.

VI. OTHER BUSINESS

Ashley Espinoza shared that there will be a make-up LWP board training with the team from CWEI for those board members who were unable to attend in May and we will make sure to include the new board members just appointed. We are also working with CWEI on providing a separate training to our WIOA providers as well.

VII. ADJOURNMENT

Heather Buch adjourned the meeting.

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**ANNUAL SUB-RECIPIENT FISCAL AND PROGRAM MONITORING
2022-2023**

BACKGROUND

In compliance with the State of Oregon Higher Education Coordinating Commission Monitoring, Corrective Actions, and Sanctions Policy, attached are the Subrecipient Monitoring Reports for the July 2022-June 2023 fiscal year.

DISCUSSION

2022-2023 LWP Subrecipients:

- Connected Lane County (CLC) – WIOA Youth
- Lane County Health and Human Services (HHS) – WIOA Adult and Dislocated Worker
- Oregon Manufacturing Extension Partnership (OMEP) – One Stop Operator

The attached pages include the final reports/responses.

CLC is one of three WIOA Youth providers during 2022-2023. The primary service location is Spark on 7th at 22 West 7th Avenue. CLC is now a stand-alone non-profit organization operating independently of the Lane ESD. The 2022-2023 contract was \$890,000. On-site fiscal and program monitoring was completed on May 1, 2023.

Expenditure Rate

2022 - 2023 Budget	Total Expenditures	Variance	Percentage Expended
\$890,000	\$867,593	\$22,407	97.5%

Youth Served

	In-school	Out-of-School	Work Exp.
Goal	44	134	39
PY 22 Enrolled	9	52	
Carry-In	44	125	
Total	53	177	60
Percent of Goal	120%	132%	154%

Fiscal Monitoring: LWP requested updates to several Fiscal Policies and clarification of transaction processing. CLC provided the updated policies and has hired a bookkeeper to manage the day-to-day financial transactions. CLC has chosen Jones and Roth to perform their first annual audit for 2022-2023.

The Program Monitoring included the review of 23 participant files and noted the following:

Overall Observations:

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

The absence of the required Equal Opportunity and Non-Discrimination (EO) posters listing LWP's Director of Workforce Programs as the Equal Opportunity Officer for the Lane Workforce Development Board is noted. LWP will order and deliver new posters for CLC to ensure compliance.

Best Practice Observations:

- CLC utilized outside funding resources to hire a case manager for in-school youth. This allowed in-school youth who were on the waiting list to be placed into the WIOA Youth Program.
- Staff have done an excellent job in placing participants in work-based learning experiences. Through the March 31, 2023, Cost Report, CLC exceeded the 20% work-based learning requirement by achieving 43%.
- CLC has expended 79% of its budget through the March 2023 Cost Report which is in-line with the first three quarters completed. OSY expenditures represent 78% of monies expended.
- Staff have exceeded enrollment goals for the program.

Both the *Lane County Youth Services* and *Marcola School District* WIOA Youth Services contracts were ended in September 2022 with services for customers transitioning to Connected Lane County.

HHS is our WIOA Adult and Dislocated Worker Service provider operating primarily from the WorkSource Oregon Lane office at 2510 Oakmont Way. The initial Monitoring Report was issued on June 8, 2023.

Expenditure Rate

2022 - 2023 Budget	Total Expenditures	Variance	Percentage Expended
\$1,767,639	\$1,596,953	\$170,686	90.34%

Participant Enrollments by Funding Source

	OJT	Scholarship	Fire DWG Career Svcs*	WorkEX	Driving Prosperity
Goal	56	30	200	13	20
Year-to-Date Actual	63	31	205	20	21
Percent of Goal	112%	100%	100%	154%	100%

*DWG Fire represents total grant participant enrollments.

The Fiscal Monitoring found several policies in need of updating, an accrued expense/refund reporting issue, a large budget/actual variance, and a difference in the Schedule of Federal Award reporting in the external audit report completed by Moss Adams, LLP. (See attached HHS Response Letter and below Corrective Action Plan)

The Program Monitoring included the review of 84 participant files and noted the following:

Overall Observations:

The PY 22/23 review of participant records reveal many inconsistencies in participant engagement, documentation, and accurate data entry. The state and accuracy of the records has deteriorated over this past year.

It is evident that the multiple funding sources in which customers are enrolled, and the way in which i-Trac is structured has created a problem with the accuracy of data entry. Most every participant record reviewed contains one or more errors. While many of the errors can be directly

linked to the confusion created by multiple funding sources in i-Trac, human error in accurate record keeping in both I-Trac and eBridge is also a contributing factor.

Of the 84 files reviewed, half (42) were enrolled in Individualized Career Services and Training Services. Of these:

- 23 (54.7% of the 42) of the participant records have questioned costs that require corrections; and
- 37 (88% of the 42) of the participant records have one or more mistakes that require corrections.

Better Practice Observations:

- Staff have done an excellent job in braiding and blending resources and co-enrolling customers with partner programs. There is evidence that customers are co-enrolled in the funding sources within this contract as well as the contractor's STEP program and programs of other workforce service delivery system partners.
- Continued use of the OJT wage reimbursement summary provides a clear explanation of the OJT invoice amount.

Monitoring Outcomes Recommendations and Plan for Correction(s):

Lane Workforce Partnership is placing the contractor on Correction Action and a Performance Improvement Plan for the entirety of PY 23/24. The Performance Improvement Plan will require the contractor to comply with the following:

1. Accurate cost and monthly program reports shall be submitted on time by the 25th of each month including accruals for expenditures and refunds. Each monthly cost report will include the General Ledger detail for both the current month and the subsequent month through the 15th as documentation of accruals.
2. LWP has updated the monthly Cost Reports to include a % of Budget Column, in order to maintain reasonable assurance that the Contractor is operating the program within the contracted budget amount and to verify that payments reflect the services provided.
3. Contractor will establish a written Payment Control Process including:
 - a. Verification by Employment Specialists before direct service payments (training, support services, OJT's) are authorized that requests comply with LWP Caps and Limitations.
 - b. Process used by Employment Specialists to collect prior approval to exceed caps and limitations.
 - c. Tracing of all payments for direct participant services ensuring:
 - i. timely collection of receipts from customers
 - ii. verification of actual payments made including the funding stream of payment.
 - d. Timeline to upload documentation and payment verification into I-Trac and eBridge.
 - e. Process for the purchase, distribution and reconciliation of initial gas cards including the responsibilities of Employment Specialists in documenting the need(s) of their customers, the receipt of the cards by their customers and the collection of final receipts.
 - f. Verification that all direct service payments have been included on a monthly cost report in the approved funding stream.

- g. Clearly defined roles and responsibilities including job titles.
4. Contractor shall comply with the contractual requirements to document all services in i-trac and upload all supporting documentation to eBridge within 72 hours of the provision of the services.
5. Complete a review of all participant records for accuracy of the data, eligibility determination, service provision, active case management, participant engagement, document collection, and fiscal reporting. The review shall be completed no less than twice per customer enrollment. The first review is to be required following customer intake and eligibility. The second is recommended to take place prior to the customer exiting services. LWP recommends an additional review of the customer record at points in time in which funding is expended for the provision of customer services.
6. Contractor shall provide LWP with a quarterly report of the participant file review, due the 20th of the month following the end of each quarter (October, January, April, and July).

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 2022-2023, we paid \$26,597 for OMEP to accomplish the following work:

- OMEP consultant shall assist Lane Workforce Partnership staff with the assessment of each comprehensive and affiliate one-stop career center in Lane County for the purposes of completing the certification process;
- Facilitation and coordination of continuous improvement work and/or teams in the one-stop centers;
- Facilitation and coordination of Strategic, Local and Center Leadership Teams in the local areas;
- Memorandum of Understanding (MOU) assessment and alignment to the WorkSource Oregon Operational Standards;
- One-Stop Delivery System gap analysis and improvement recommendations;
- Development and implementation of feedback mechanisms to provide data driven decision-making;
- One-Stop Delivery System program assessment and alignment; and
- Other improvement projects specific to local area needs.

As a low-risk auditee, we reviewed the audit completed by Kern Thompson for the period ending June 30, 2022. There were no findings or observations, and the Schedule of Federal Awards was accurately presented.



LANE WORKFORCE PARTNERSHIP

Youth Fiscal Monitoring – Connected Lane County
2022-2023 Onsite Review – February 2023

WIOA Youth Contract # 31163
OYEP Contract # 31165

Amount \$ 890,000
Amount \$ 516,222

Connected Lane County: Heidi Larwick, Executive Director, Annie Dropek, Project Coordinator-WIOA, Lizzie Brown, Program Manager-OYEP, Jodi Arrant, Payroll Specialist & Bookkeeper, Valerie White, Kernutt Stokes

LWP: Tiffany Cink, Cindy Perry, Ryan Kounovsky and Stephanie Lovell

Written responses to the Lane Workforce Partnership WIOA & OYEP Youth Fiscal Monitoring Questionnaire were provided by Heidi Larwick, Executive Director, Annie Dropek, Project Coordinator-WIOA, Lizzie Brown, Program Manager-OYEP Connected Lane County. The following details were noted:

- Connected Lane County total expenditures for WIOA Youth In School are 63% and Out of School are 73% of budget respectively, OYEP is 84% of budget, all programs are at or above targeted expenditures.
- Quarterly WEX costs reported based off actual enrollments of youth served In-School or Out-of-School.
- February 2023 WEX expenses reported were 24% of total invoiced costs. The contract states a 20% minimum of total funds to be spent on WEX.
- Payroll records are kept online in Gusto, a payroll management software. Timecards are entered by employees and then electronically approved in Gusto, by Heidi Larwick, Executive Director.
- All staff were verified by Stephanie Lovell, LWP Accountant. WIOA Youth & OYEP Customers were verified in eBridge and Itrac by Anne Nestell, LWP Board Relations and Program Administration.
- Gift cards are used as Incentives, each incentive is documented in I-Trac and eBridge.
- Connected Lane County does not have a Federally approved Indirect Cost Rate, rather they have elected to use an indirect rate of 7.00%.
- No program revenue was generated.
- Total WIOA In-School and Out-of-School Youth participant services expenditures for February 2023 were detailed in the general ledger provided and match the \$76,898.67 expenditures reimbursed for the period.
- The total OYEP Youth participant services expenditures for February 2023 were detailed in the general ledger provided and match the \$56,109.40 expenditures reimbursed for the period.
- In May 2022, Connected Lane County separated from Lane Education Services District, and now operates as a stand-alone non-profit organization. LWP is monitoring the following areas:

Timesheets/Paystubs/Support Services/Incentive payment processes for documentation both in I-Trac / eBridge.

- Connected Lane County monitors their subcontractor, Looking Glass Community Services throughout the year, a formal monitoring will be completed prior the end to the end of this fiscal year and provided to LWP.

On May 1st, LWP performed Onsite Monitoring of CLC:

During the onsite visit, transaction testing was performed to evaluate the accuracy and integrity of expenditures charged to both the WIOA Youth & OYEP contracts:

- Staff Wages and Fringe for Feb 2023 – timecard entry and paystubs were reviewed in Gusto and matched to the payroll registers in QuickBooks. The costs follow the CLC allocation method for the WIOA Youth and OYEP contracts. All expenditures charged to the contracts were validated.
- February 2023 QuickBooks Bank Register, Oregon Pacific Bank February Statement and the QuickBooks Online bank reconciliation reports were reviewed, expenditure and revenue transactions matched and there were no questioned entries.
- February 2023 Capital One Credit Card Statement, Google doc’s tracking log with detailed cost allocation of expenditures to CLC grants, and the February 2023 bill payment to Capital One were reviewed, transactions charged were verified against expenditures charged in Feb. 2023 to WIOA Youth and OYEP contracts. Capital One CC payment was also verified against the statement charges in QuickBooks.
- Chart of Accounts # 6080 – Indirect Cost Allocation Account transaction detail was verified against February 2023 WIOA Youth & OYEP Cost Reports and was accurate, the cost allocation follows CLC’s policy.
- Petty Cash log and February 2023 transactions were reviewed and verified. The review of the log for petty cash did not clearly show a Petty Cash Fund total.
- Travel Expenditures for February 2023 for the OYEP contract were reviewed and balanced against the expenditures charged on the Cost Report.
- Looking Glass Community Services contract was reviewed. Section E of the contract needs to list the contractors Unique Entity Identifier number. Looking Glass Community Services February invoice and payment were reviewed and matched the expenditures charged in the February 2023 cost report.

During the onsite visit, the following items from the Monitoring Questionnaire were confirmed by CLC Staff:

Section A – Administrative Systems:

- A-1 –Support Service Payment Form information collected by Resource Navigators prior to payment of support services and incentives will be uploaded to eBridge with signed receipts starting with the new contract year – July 1, 2023. CLC Staff also clarified that actual payments are made via the process described in Question F-2
- A-2 – Confidential Youth Participant Records uploaded to EBridge are kept for one year and then confidentially shredded/destroyed.
- A-4 – Each Participant signs a Grievance Policy and the document is uploaded to eBridge as part of the Registration Packet.

- A-8 – Records Retention Policy – Update Policy to match 8-year requirement of contracts.
- A-6 – Injuries sustained by participants in CLC programs outside of work-related injuries are covered by CLC’s extensive General Liability policies.

Section F – Fiscal Systems:

- F-1 – See updated Internal Control Policy.
- F-4 – See updated Petty Cash Policy/Procedure.
- F-5 – See updated Procurement Policy.
- F-8 – The 7% Indirect Costs charged each month are calculated as 7% of Direct Salaries and Fringe.
- F-21 – Staff Wages are allocated to the different CLC programs based on annual management review of actual time tracked in CLC staff calendars. WIOA In-School and Out-of-School direct staff costs are based on Caseloads.
- F-23 – For participants receiving paper checks for wages, CLC has developed a close relationship with their bank (Oregon Pacific Bank) which verifies participant identification prior to cashing the check. Participants are only receiving paper checks when they don’t have access to their own bank account.
- F-27 – The LWP WIOA Incident Reporting Policy was provided and CLC confirmed they are following the required steps.

The CAFR including an Independent Auditor’s Report has not yet been performed as this is Connected Lane County’s first year as a stand-alone non-profit organization. CLC has chosen Jones and Roth to perform the audit for the year ended 6/30/23. LWP will review the Audit and Schedule of Federal Awards as soon as it is available.

Connected Lane County is a valued partner providing excellent services to the Lane County community they serve. Overall, the fiscal policies and procedures have been well developed and are being followed by Connected Lane County Staff. We look forward to continuing our work with Connected Lane County as an Innovative Community Partner.

Summary prepared by:

Stephanie Lovell _____

Stephanie Lovell, Accountant
Stephanie@laneworkforce.org

05/02/2023

Date



WIOA YOUTH PROGRAM FILE MONITORING

Connected Lane County

Program Year 2022

Youth Program Service Provider:

Heidi Larwick, Connected Lane County

Date(s) of Report:

April 27, 2023

2022 Contract Amount:

\$890,000.00

Total Participants Included in File Review:

Connected Lane County and Looking Glass: 23 Files

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

Overall Observations:

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

The absence of the required Equal Opportunity and Non-Discrimination (EO) posters listing Lane Workforce Partnership's Director of Workforce Programs as the Equal Opportunity Officer for the Lane Workforce Development Board is noted. Lane Workforce Partnership will order and deliver new posters for Connected Lane County to ensure compliance.

Best Practice Observations:

- Connected Lane County utilized outside funding resources to hire a case manager for in-school youth. This allowed in-school youth who were on the waiting list to be placed into the WIOA Youth Program.
- Staff have done an excellent job in placing participants in work-based learning experiences. Through the March 31, 2023 Cost Report, Connected Lane County exceeded the 20% work-based learning requirement by achieving 43%.
- Connected Lane County has expended 79% of its budget through the March 2023 Cost Report which is in-line with the first three quarters completed. OSY expenditures represent 78% of monies expended.
- Staff have exceeded enrollment goals for the program.

Improvement Since PY 21 Monitoring:

- Connected Lane County has worked very hard to make sure all required eligibility documentation is uploaded to eBridge in a timely manner.
- Staff have done a good job of entering performance reporting documentation in I-Trac in a timely manner. Performance reporting documentation has improved since this time last year.

Performance Measure	Performance Target	Provider Performance, April 2023	Provider Performance, April 2022
Education or training activities or employment in the 2 nd Quarter after Exit	73.3%	72.34%	48.5%
Education or training activities or employment in the 4 th Quarter after Exit	78.6%	68.29%	47.9%
Credential Attainment Rate	66.9%	61.29%	28.6%
Measurable Skills Gain	48.3%	44.64%	35.6%
Median Earnings 2 nd Qtr. after Exit	\$4,604	\$4,655	\$5,189

Note: The following participants are showing an N in the numerator for Measurable Skills Gain. Case Managers need to enter the MSG by June 30th in order for the participant to receive credit.

Measurable Skills Gain

Name	I-Trac Number
██████████	2262113
██████████	2371118
██████████████████	2397653
██████████████████	2398669
██████████	2403613
██████████████	2409609
██████████	2482359
██████████	2488693
██████████	2489279
██████████████	2492116
██████████████	2492726
██████████	2492895
██████████	2512650
██████████████	2524489
██████████	2533442
██████████	2543767
██████████████	2551755
██████████████	2557868
██████████████████	2560143
██████████	2569017
██████████	2569866
██████████████	2569891
██████████████	2574510
██████████	2574775

[REDACTED]	2581530
[REDACTED]	2586421
[REDACTED]	2592257
[REDACTED]	2593526
[REDACTED]	2594021
[REDACTED]	2595163

The following participants are showing an N in the numerator for credential attainment. Keep in mind that this measure is exit based and performance must be captured and documented within a year following the date of exit.

Name	I-Trac Number
[REDACTED]	2273195
[REDACTED]	2302691
[REDACTED]	2350964
[REDACTED]	2368771
[REDACTED]	2396543
[REDACTED]	2398112
[REDACTED]	2409293
[REDACTED]	2413517
[REDACTED]	2416805
[REDACTED]	2482420
[REDACTED]	2557873

PY 22 Records Requiring Corrections:

There are 11 records which need updated documentation. See **Attachment B – Records Requiring Corrections.**

PY 22 Monitoring Outcomes Summary:

Connected Lane County has demonstrated many improvements in their management of the WIOA programs this past year. While there are a few participant record updates 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.

Within the Contractor's response to the Draft Monitoring Report, Contractor shall outline their plan to provide corrections to the items listed in **Attachment B – Records Requiring Correction by May 31, 2023**. NOTE: This is not a Corrective Action Plan, rather it is a response indicating the Contractor's plan to correct the accuracy of the records indicated in Attachment B.

Upon review of the monitoring response from Connected Lane County, Lane Workforce Partnership will provide Contractor with a final Monitoring Report for Program Year 2022/2023.

List of WIOA Youth Program Participants Reviewed

Name	Number
[REDACTED]	1997183
[REDACTED]	2171923
[REDACTED]	2211330
[REDACTED]	2350566
[REDACTED]	2377379
[REDACTED]	2386790
[REDACTED]	2514017
[REDACTED]	2546270
[REDACTED]	2547041
[REDACTED]	2550553
[REDACTED]	2551808
[REDACTED]	2557610
[REDACTED]	2560979
[REDACTED]	2569866
[REDACTED]	2571762
[REDACTED]	2571798
[REDACTED]	2581365
[REDACTED]	2581914
[REDACTED]	2583743
[REDACTED]	2585525
[REDACTED]	2591970
[REDACTED]	2592877
[REDACTED]	2599829

Records Requiring Corrections

NOTE: The following records need to have updates made to their file in I-Trac and/or e-Bridge.

- 2171923:
 - e-Bridge: ISP is not within the past 12 months.

- 2350566:
 - e-Bridge: ISP is not within the past 12 months.

- 2386790:
 - I-Trac: February 28, 2023 is the last case note documented and the last qualifying service was February 28, 2023. It is the expectation of this program that there is on-going communication no less than once every 30 days.

- 2547041:
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2557610:
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2560979:
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2571762:
 - e-Bridge: ISP is not within the past 12 months.
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2571798:
 - e-Bridge: ISP is not within the past 12 months.

- 2581365
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2581914:
 - I-Trac: Missing \$48.06 payment for January/February 2023 Hotspot Verizon. Payment is noted in the case notes but is not listed under the Support Service Payments tab.

- 2583743
 - I-Trac: Missing Support Service payment of \$143.38 for work clothes (Kohls) 8/4/22
 - I-Trac: Missing Support Service payment of \$4.00 for parking 8/5/22
 - I-Trac: Missing Support Service payment of \$2.00 for parking 8/4/22
 - I-Trac: Missing Support Service payment of \$4.00 for parking 8/3/22
 - I-Trac: Missing Support Service payment of \$8.00 for parking 8/2/22
 - I-Trac: Missing Support Service payment of \$8.00 for parking 8/1/22

OYEP YOUTH PROGRAM FILE MONITORING

Connected Lane County

Program Year 2022

Youth Program Service Provider:

Heidi Larwick, Connected Lane County

Date(s) of Report:

April 27, 2023

2022 Contract Amount:

\$516,222

Total Participants Included in File Review:

Connected Lane County: 12 Files

See Attachment A List of Participants for the name of each file reviewed.

Overall Observations:

OYEP is being managed well and required program records are accurate and up-to-date.

Best Practice Observations:

- Piloted a Manufacturing Technology Pre-Apprenticeship Program.
- Hosted multiple recruiting events aimed at BIPOC youth and their families.
- Provided participants the opportunity to participate in financial literacy classes.
- Notable Project: Participants prototyped a full-size arcade game cabinet with CNC files for Microsoft's Makecode Arcade. The CAD files designed by the participants to construct the prototype will be posted on MakeCode's website for free download so schools with woodshops can make their own.
- Strong partnerships with educators, administrators, high school guidance counselors, and community organizations.

PY 22 Records Requiring Corrections:

There are not any records requiring correction.

PY 22 Monitoring Outcomes Summary:

Connected Lane County staff are doing a tremendous amount of work and have worked diligently to meet contractual expectations and compliance.

List of OYEP Participants Reviewed

Name
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]



LANE WORKFORCE PARTNERSHIP

WorkSource Lane Fiscal and Program Monitoring – Lane County HHS
2022-2023 Desk Review

Date: 6/8/2023
Contract #: 31167 and modifications Amount: \$1,767,639.00

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 Deanna Strachan-Wilson. The following details were noted:

- Draft Records Confidentiality Policy – provide Final Upon Completion
- The Lane County Fraud Hotline Reporting and Investigation policy, Fraud Hotline APM Ch 2 Section 26, does not meet the requirements of Lane Workforce Partnership’s Incident Reporting Policy. Lane Workforce Partnership’s Incident Reporting Policy requires: “If an incident of fraudulent activity is detected, it must be immediately reported to the Department of Labor Office of the Inspector General (OIG) utilizing the online Submission Form at the Department’s Incident Reporting system, found at the website: www.oig.dol.gov/hotlinecontact.htm.” Contractor shall follow Lane Workforce Partnership’s policy.
- Record Retention – Policy is Draft and needs to reflect 8 years in compliance with Contract Section 7 (see attached)
- Accrued Expenditures/Refunds – In accordance with Section C, Paragraph 3 “The Subcontractor shall add accruals to their invoice of actual and allocable costs incurred, but not yet paid”. In the past, the Lane County system of invoicing based on cash expenditures for July through May and then including all accruals with the June and/or June final invoices has been acceptable. During the current year, there has been a marked increase in the number of “refunds” and “canceled/voided checks”.
 - Example #1: The December 2022 Invoice included Tuition and Fees of \$5708 for customer C Shaner, the January 2023 Invoice included additional Tuition of \$2250. The check written in December had been returned in January but the credit wasn’t recorded until February. After verifying with staff, it was known in December that the customer wouldn’t be completing training and that only a portion of the Tuition would be owed
 - Example #2: The February 2023 Invoice included Tuition of \$5000 paid for customer A Miscoe to Aisling Trucking and the March 2023 Invoice included Tuition of \$5000 paid for A Miscoe to Driving 160. After verifying with staff, the original payment was made to the wrong vendor, LWP reduced the March invoice by the \$5000 duplicate payment with notification to both Connie Perry and Deanna Strachan-Wilson. The April 2023 Invoice included a credit of \$5000 for the original incorrect payment.

As part of the overall Corrective Action Plan for 2023-2024 for Lane County:

With each Monthly Invoice, Lane County will include General Ledger Documentation for both the Current Month Invoiced and the Following Month through at least the 15th.

- Payroll records are tracked in the PeopleSoft Timecard System. Both employees and supervisors electronically sign off on a weekly basis.
- No significant variances to budgeted totals were noted by Lane County. However, the actual contract expenditures for December 2022 were only 39% of the overall budget which is more than \$180,000 less than expected at 50% of the contract year.
- All Staff are listed in the Guide and verified by Cindy Perry, Director of Workforce Programs.

- For all Customer Enrollment and related payment verifications, see “Program File Monitoring” starting on page 3. 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. During 2022-2023, LWP negotiated for reduced indirect costs based on the substantial increase in Lane County costs. An agreement was reached to reduce the Indirect Costs and fund more OJT slots.
- No program income was generated.
- Total expenditures for December 2022 were detailed in the general ledger provided and equal the \$158,846.76 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 6/30/22 was provided electronically. The Schedule of Expenditure of Federal Awards details all federal awards with CFDA numbers starts on page 229. The WIOA funds are detailed as “Passed through Lane Workforce Partnership” and do not match the amounts paid by LWP to Lane County. The attached summary was emailed on December 2, 2022 with the correct amounts for the WIOA Adult 17.258, WIOA Dislocated Worker 17.278 and WIOA Dislocated Worker Grants: COVID and Fire Restoration 17.277. For WIOA Youth 17.259, the amounts are correct but the Pass Thru Entity Identification Number should be 31151.

Additionally, the audit report cites a material weakness finding in regards to the Reporting of Bond Proceeds. This finding does not directly affect the WIOA Funds. LWP will follow up during the 2023-2024 monitoring to verify compliance.

We are citing findings for the following fiscal items with a written response required by June 23, 2023.

- Accrued Expenditure Reporting specifically the delayed reporting of refunds and voided transactions.
- Budget to Actual Variances.
- Incorrect Reporting on the Schedule of Federal Awards.

As part of the 2023-2024 corrective action plan, Lane County is required to:

- With each Monthly Invoice, Lane County will include General Ledger Documentation for both the Current Month Invoiced and the Following Month through at least the 15th.
- Detail an expenditure plan each quarter that the Budget to Actual variance is greater than 5%.

Summary prepared by:

Tiffany Cink

Tiffany Cink, Chief Operating Officer

tiffanyc@laneworkforce.org

PROGRAM FILE MONITORING

Lane County Health and Human Services/Human Services Division

Program Year 2022

WIOA Adult/DW or Youth Program Service Provider:

Kachina Inman, Assistant Director

Kate Budd, Interim HSD Manager

Deanna Strachan-Wilson, Workforce Services Supervisor

Date(s) of Report:

May 22, 2023

2022 Contract Amount:

\$1,767,639

Total Participants Included in File Review:

Total Number of Files Reviewed: Total of 84 participant files reviewed for those served during the period of July 1, 2022 – March 31, 2023.

File review included participants enrolled in the following funds:

- Dislocated Worker Grant – Fire
- Driving Prosperity/EDA Grant
- State of Oregon Prosperity 10K
- State of Oregon WorkEx Grant
- WIOA Adult and Dislocated Worker

See Attachment A: List of Participant Files Reviewed.

Overall Observations:

The PY 22/23 review of participant records reveal many inconsistencies in participant engagement, documentation, and accurate data entry. The state and accuracy of the records has deteriorated over this past year.

It is evident that the multiple funding sources in which customers are enrolled, and the way in which i-Trac is structured has created a problem with the accuracy of data entry. Most every participant record reviewed contains one or more errors. While many of the errors can be directly linked to the confusion created by multiple funding sources in i-Trac, human error in accurate record keeping in both iTrac and eBridge is also a contributing factor.

Of the 84 files reviewed, half (42) were enrolled in Individualized Career Services and Training Services. Of these:

- 23 (54.7% of the 42) of the participant records have questioned costs that require corrections; and
- 37 (88% of the 42) of the participant records have one or more mistakes that require corrections.

Better Practice Observations:

- Staff have done an excellent job in braiding and blending resources and co-enrolling customers with partner programs. There is evidence that customers are co-enrolled in the funding sources within this contract as well as the contractor's STEP program and programs of other workforce service delivery system partners.
- Continued use of the OJT wage reimbursement summary provides a clear explanation of the OJT invoice amount.

Improvement Since PY 21 Monitoring:

- Staff are beginning to provide follow up services and engaging customers in rapid re-employment services when needed.

Concerning Observations from PY 21 Which Continue to Persist in PY 22:

- 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.
- Completion of OJT Progress Reporting and Invoicing is late in several records.
- Career Services and Case notes continue to require the following improvements:
 - Supportive services – identification of need, provision of the service, follow up when needs are identified
 - Training costs and attaching training to the goals identified on the Individual Employment plan
 - Closing case notes at completion/exit of services and documentation of unsubsidized employment are rarely completed
 - Next steps are often identified, but not followed up on.

New PY 22 Concerning Observations:

LWP Policy Compliance:

- The Eligibility Policy and Enrollment guidelines require approval from Lane Workforce Partnership for all customers not in compliance with Selective Service registration requirements.
- The policy requiring participants to receive Career Exploration either through workshop attendance or meeting one-on-one with a Career Advisor has not been followed consistently.
- Accurate and timely processing of direct participant expenditures is lacking.
 - Instances of check requests to H&HS Fiscal made more than 30 days after completion of OJT;
 - Instances of check requests and check's processed for inaccurate amounts;
 - Instances of expenditures charged to an incorrect fund; and
 - Payment processing timeline is extraordinarily long.
- Cost reports submitted to LWP are late and often need corrections.

Reporting of Services:

- Request for scholarship application is being documented as a career service by the Office Assistants. This is technically providing information and is not a career service. The practice of documenting the provision of the application in iTrac needs to be discontinued.
- It is evident, that for the most part, staff are working to actively engage customers in services. One of the staff is consistent with providing following up services post-employment and engaging customers in rapid re-employment services when needed. However, proactive case

management and participant engagement is not consistently evident in case notes and i-Trac service records.

Reporting of Outcomes:

- There are many instances in which a case note indicates the participant is employed, but the information is not documented in the outcomes tab in i-Trac.
- Participants enrolled in any type of training activity are included in the denominator for the measurable skill gain performance measure. There are several instances of the services being paid for and documented in more than one fund, but the Measurable Skill Gain only being recorded in one of the funds. It must be recorded in all of the funds in which the service is provided.

General Observation and Future Correction for the OJT Program:

- There were several instances of short eight-week OJT plans in which the mid-point review was completed at the time of the final review, which technically would be late. It is evident that completing the required mid-point progress report for short-term OJT's is not feasible. The OJT policy will be revised to eliminate the requirement to complete a mid-point progress report and allow staff to complete only a 30-day and final progress report for OJT's less than 8 weeks long beginning PY 23/24.

General Observation and Future Correction for the Provision of Supportive Services

- Based on the number of repeat instances in which gas cards are provided for transportation supportive services without the collection of receipts to verify the purchase, a policy change will be implemented beginning PY 23/24. This change will allow for only one gas card per participant. A receipt must be collected and all subsequent services shall be in the form of mileage reimbursement to and from allowable job search and training activities.

PY 22 Records Requiring Corrections:

There are several records in which items are missing documentation, proof of credential attainment, record completion, accurate data entry. While these do not, in general, pose a concern for questioned costs, they do need to have corrections made. **See Attachment B – Records Requiring Corrections.**

PY 22 Participant Records with Potential Questioned Cost:

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

Eligibility Concerns:

Participant #1815386 – B. Bash

This customer is potentially not eligible for services due to not being registered with Selective Services.

- Customer is not registered with Selective Service and there is no approval on file from Lane Workforce Partnership authorizing enrollment. Customer's statement does not indicate reason for non-registration.
- Supportive Service provided for hardship license - \$125 – Case note indicates the customer is not eligible to get the license from DMV yet a payment was made for the provision of this service. Copy of the license is not on file.

- **Total questioned cost = \$125.00**

Correction Need:

- Selective Service – Provide customer statement demonstrating the customer did not knowingly or willfully fail to comply with Selective Service registration requirements. Submit statement and request for retroactive approval to enroll the customer to Lane Workforce Partnership’s Director of Workforce Programs.
- Resolve status of the DMV licensing fee:
 - Was the fee paid to DMV refunded to the customer? If yes, collect the refund from the customer and pay it back to the program; or
 - Was the customer able to attain the hardship license? If yes, a copy is needed for the records.

Participant #411577 – C. Jackson

- NOTE: E-mail sent to Deanna Strahan-Wilson on 5/2/23 regarding this file – the correction may be in progress at the time of finalizing this monitoring report.
- Customer is not eligible for enrollment in DWG. Customer does not qualify as a dislocated worker as a displaced homemaker. Customer’s self-attestation states she is dependent on the income of her husband, which is still available to support the household. There is no indication that the spouse is not working nor that the spouse has left the household. All case notes indicate the spouse continues to work and provide support to the household. There for, the supportive services funded under DWG are not allowable and are currently questioned costs as follows:
 - 7/27/22 – Support Service – Gas Cards - \$50 (also missing receipts in eBridge)
 - 6/10/22 – Support Service – Gas Cards - \$50 (also missing receipts in eBridge)
 - 5/17/22 – Ed2Go Tuition - \$299
 - 4/12/22 – Ed2Go Tuition - \$129
 - **TOTAL Questioned Costs: \$528.00**

Correction Needed:

- Move all charges to Prosperity 10K/Adult
- Collect receipts for gas cards provided and upload them into eBridge.

Gas Cards with Missing Receipts

The following list of participants were provided gas cards for which there are no receipts on file in eBridge to support the expense. The correction needed for each is:

- Collect and file the receipt for the purchase of gas; or
- If unable to collect the receipt, document in a case note the attempts made.
- For those customers who have not provided receipts, a case note shall be added indicating the customer is no longer eligible for additional supportive services **of any type** without the approval of Lane Workforce Partnership’s Director of Workforce Programs.

Participant #1485753 – K. Gillooly: Supportive Service provided - \$25 gas card.

Participant #2533473 – H. McCoy: Supportive Service provided - \$25 gas card.

Participant #2419808 – M. Wiley: Supportive Service provided - \$50 gas card.

Participant #491714 – L. Wilson: Supportive Service provided 10/6 - \$50 gas card.

Participant #411577 – C. Jackson: Supportive Services provided – 7/27 - \$50 gas card and 6/10 - \$50 gas card

Participant #2563856 – T. McGahan: Supportive Services provided. There is a case note acknowledging the participant lost the receipt for one of the cards issued on 3/23. There are no receipts for the cards issued on 4/18 - \$50 gas card. Two additional cards were issued on 5/15.

Participant #2256697 -M. Kuster: Supportive Services provided – 3/2/23 - \$100 gas card

Participant: #1274114 – A. Cline: Supportive Services provided – 12/2/22 - \$100 and 2/28/23 - \$50

- For the 12/2 services, there is a case note indicating the attempt to collect the receipt
- For the 2/28 service, a receipt was collected for \$25, there are no case notes regarding the attempt to collect the receipts for the remaining \$25.

Participant: #1563935 K. Patterson: Supportive Services provided 3/17/23 - \$50 gas card

Participant: #1739691 K. Issetel: Supportive Services provided on 12/27 - \$50 and 1/3 - \$50 gas cards

Participant: #1669217 B. Peais: Supportive Services provided on 1/3 - \$50 gas card

Participant #2591442 – D. Thomson: Supportive Service provided on 3/23 - \$50 gas card

Participant #2308540 – C. Barrow: Supportive Service provided on 12/2 - \$50 gas card

Participant #2553482 – C. Shaner: Supportive Service provided on 12/2 - \$100 gas card

Participant #2588427 – L. Trzop: Supportive Service provided on:

- 12/19 - \$50, 2/7 - \$50, and 2/16 - \$30 gas cards.
- There is no request form for gas card issued on 1/3.

Total Questioned Costs for Missing Gas Card Receipts = \$955

General Support Services:

Participant #2295458 – K Henry

- 7/22/22 Support Service in the amount of \$90. The supporting document indicates the amount is \$105. Need documentation supporting actual amount paid.

Correction Needed:

- Provide matching documentation for actual amount paid.
- There is no questioned cost as amount paid is less than supporting documents. However, the record needs to be corrected.

Participant #3337242 – D. Huesca

- Supportive Service documented in i-Trac of \$24.99 on 11/30/23. There is no supporting documentation in eBridge.
- Cost report indicates a refund from Best Buy of \$88.57 on 12/1/23. There is no record of the refund in either i-Trac nor eBridge.

Correction Needed:

- Provide supporting documentation for the \$24.99 service provided.
- Document the Best Buy refund in iTrac and provide supporting documents.
- **Questioned costs = \$24.99**

Participant #1739691 – K. Issertel

- Missing documentation for the processing fee of \$19.71 for child support payment on 1/4/23.

Correction Needed:

- Provide supporting documentation for the \$19.71 fee.
- **Questioned costs = \$19.71**

Participant #1669217 – B. Peais

- Driving Prosperity is still showing an over-expenditure of \$29.60 in the i-Trac record. Note: After request made to H&HS in January to accurately account for the expense, LWP reduced the payment to H&HS in March by \$29.60 to correct the over-expenditure.

Correction Needed:

- Correct the i-Trac payment record.

Incorrect Charges on the December Cost Report:

Participant #2585769

- Customer is listed as DW on the December cost report and should be Adult. This customer is not DW eligible. All charges need to be credited to DW and charged to Adult.

Participant #2588822

- Customer is listed as DW on the December cost report and should be Adult. This customer is not DW eligible. All charges need to be credited to DW and charged to Adult.

PY 22 Monitoring Outcomes Summary:

Lane County Health and Human Services has not demonstrated many improvements in their management of the WIOA programs this past year. In general, there are mistakes that are being made that can be corrected with a regular compliance review of the participant records. Therefore, LWP is placing the contractor on correction action and a Performance Improvement Plan for the entirety of PY 23/24. The Performance Improvement Plan will require the contractor to complete a second review of all files for accuracy of the data, eligibility determination, service provision, active case management, participant engagement, document collection, and fiscal reporting. The review shall be completed no less than twice per customer enrollment. The first review is to be required at customer intake and eligibility. The second is recommended to take place prior to the customer exiting services. LWP recommends an additional review of the customer record at points in time in which funding is expended for the provision of customer services. Contractor shall provide LWP with a quarterly report of the review, due the 20th of the month following the end of each quarter (October, January, April, and July).

LWP is requesting Contractor to correct the items listed above in **PY 22 Participant Records with Potential Questioned Costs** by June 15, 2023. A summary of the corrections shall be included in Contractor's response to this Draft Monitoring Report, which shall be due on June 23, 2023.

Within the Contractor's response to the Draft Monitoring Report, Contractor shall also outline their plan to provide corrections to the items listed in **Attachment B – Records Requiring Correction**. 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 Contractor with a final Monitoring Report for Program Year 2022/2023.

List of Participant Files Reviewed

Name	Number
[REDACTED]	2580437
[REDACTED]	2584552
[REDACTED]	2585769
[REDACTED]	2588822
[REDACTED]	4147818
[REDACTED]	4115777
[REDACTED]	3327339
[REDACTED]	3847090
[REDACTED]	4138355
[REDACTED]	4174392
[REDACTED]	1526914
[REDACTED]	4164907
[REDACTED]	1915319
[REDACTED]	4154505
[REDACTED]	1274114
[REDACTED]	4170337
[REDACTED]	1804874
[REDACTED]	1479229
[REDACTED]	4167363
[REDACTED]	2918756
[REDACTED]	4118376
[REDACTED]	4163765
[REDACTED]	1815386
[REDACTED]	1726856
[REDACTED]	1485753
[REDACTED]	3846525
[REDACTED]	2295458
[REDACTED]	3337242
[REDACTED]	2533473
[REDACTED]	1961922
[REDACTED]	2886181
[REDACTED]	2419808
[REDACTED]	491714
[REDACTED]	3825588
[REDACTED]	2591132
[REDACTED]	2574650
[REDACTED]	2256697
[REDACTED]	2553458
[REDACTED]	2580277
[REDACTED]	1873779
[REDACTED]	2571548
[REDACTED]	1806459
[REDACTED]	2152919

[REDACTED]	2580823
[REDACTED]	1915968
[REDACTED]	2119324
[REDACTED]	1961679
[REDACTED]	974803
[REDACTED]	2581358
[REDACTED]	2586379
[REDACTED]	2587847
[REDACTED]	2586529
[REDACTED]	1595104
[REDACTED]	2582953
[REDACTED]	266135
[REDACTED]	2589864
[REDACTED]	2585439
[REDACTED]	2015342
[REDACTED]	158611
[REDACTED]	1747832
[REDACTED]	584990
[REDACTED]	2583328
[REDACTED]	1532678
[REDACTED]	2586335
[REDACTED]	478589
[REDACTED]	2130051
[REDACTED]	1637456
[REDACTED]	2563541
[REDACTED]	1793455
[REDACTED]	2590958
[REDACTED]	2075765
[REDACTED]	2593220
[REDACTED]	1770661
[REDACTED]	1774138
[REDACTED]	2563856
[REDACTED]	2603893
[REDACTED]	2553195
[REDACTED]	2591025
[REDACTED]	1667927
[REDACTED]	1772872
[REDACTED]	1563935
[REDACTED]	2146936
[REDACTED]	2608880
[REDACTED]	1905686

Attachment B

Records Requiring Corrections

Basic Career Services Customers: Of the 84 files reviewed, half (42) of the customers only received basic career services, NCRC testing, or attended workshops. These customers are technically enrolled in the WOA program. All but one of the customers did not receive Individualized Career Services which would have triggered a requirement to complete WIOA intake and eligibility. Therefore, all of these records were clean and passed the file review.

Participant #1772872, P. Patras did receive Individualized Career Services and should have had WIOA intake and eligibility completed to enroll her in WIOA DW. Staff will receive training from LWP to ensure their understanding of the types of staff assisted services that require enrollment into a WIOA fund.

Records Requiring Corrections:

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 were reviewed.

Participant #2256697

- Measurable Skill Gain (MSG) needs to be added to DW and WorkEx fund
- Case note on 3/17 states participant has a job, case note on 5/5 states he is applying for jobs. Need clarification and employment outcome needs to be added to DW/DWG/WorkEx funds.

Participant: #1563935

- Case note on 4/11 indicates customer is employed but the employment information is not completed and needs to be added to DW/DP funds. Note: A majority of case notes for this participant are found in the DW record.

Participant #2574650

- Great job in transitional work experience employment to OJT. However, the OJT training plan was signed after the OJT start date. Even when transitioning from one type of service to another, the plan needs to be signed prior to the start date of training. The OJT start date was 1/31/23 and the plan was signed by the employer on 2/6/23. There is no visible date next to the participant's signature on the OJT training plan.
- P10K Employment record is duplicated in the outcomes tab – one needs to be deleted
- The MSG needs to be added to DW fund

Participant #1772872

- Customer provided with individualized career services which means that documentation should have been completed for WIOA eligibility, intake, and enrollment. The P10K application was completed, but no services provided under P10K.
- Note: This customer was laid off from Arcimoto, which means they are eligible to receive rapid response services.

Participant: 2608880

- The employment record in DW needs to be updated to reflect the last date of employment of 4/25.
- MSG needs to be added to DW.
- The Planned payments need to be removed from DW.
- The payment of the OJT needs to be documented in P10K.

Participant #2563856

- MSG needs to be documented in DW and P10K fund.
- Case notes are not clear about blended funding and payments. Nor are there consistent case notes regarding the need for and provision of supportive services. There is a 3/21 case note

indicating that the participant will also be supported by the STEP program. All payments for training and support services appear to have been provided by DWG and P10K. Case notes should clearly state sources of funding and which partner/program is paying for which service.

Participant #2585439

- The original wage amount documented on the OJT training plan was “approx.” and crossed out and hand written in as \$22.90. Wage cannot be an approximate. All OJT participants should know the actual wage they will earn prior to the start of the OJT.
- The 30-day wage verification document is not clear as to the actual wage paid to the participant.
- The amount paid on the invoice is \$24.10. The backup documentation supports \$24.10 as the wage paid. However, the OJT plan was not modified to this amount and there are no case notes explain the wage discrepancy.

Participant #2567736

- Two DW records were opened on 2/15/22 – one of them needs to be deleted.
- 12/1/22 case note indicates training progress – the measurable skill gain needs to be documented
- Multiple case notes indicate the customer is working – the employment information needs to be added to iTrac records.

Participant #2596459

- Measurable skill gain needs to be added to the WIOA Adult record.
- There was no case note supporting the 12/20 support service of \$120.04
- The OJT wage was increased from \$16 - \$17 midpoint, but the OJT training plan was not modified as required.
- Great job on transitioning this customer from homelessness to self-sufficiency.

Participant #4147818

- Measurable skill gain needs to be added to the P10K record.
- Payments need to be removed from the i-Trac Adult record.
- Add explanation documents to eBridge and an i-Trac case note regarding the support service request for \$531.98, refund of \$485. The difference of the two is documented in i-Trac and support documents as \$46.98.

Participant #2585769

- Measurable skill gain needs to be added to the adult record.
- Planned payment needs to be deleted from the adult record as the funding source for the OJT is P10K.
- OJT start date needs corrected – iTrac service states 8/25, case note and training plan state 8/29.
- Customer is listed as DW on December cost report and should be Adult. Customer is not DW eligible.

Participant #2588822

- OJT start date needs to be corrected – iTrac service states 9/22 and training plan states 9/29.
- Customer is listed as DW on the December cost report and should be Adult. Customer is not DW eligible.

Participant #2460625

- Training services need to be added to DWG record as training is partially paid with DWG.
- There is a gap in service from 12/20 – 4/28 indicating a lack of active customer engagement

- The employment information is only documented in P10K and needs to be added to both DW and DWG
- The P10K application is missing in eBridge
- Training is paid out of two funds – an itemization of the payment on the supporting documents would be helpful. For example:
 - Tuition - \$7,000
 - P10K Payment - \$4,500
 - DWG Payment - \$2,000
 - Student Paid - \$500

Participant #2584552

- Measurable skill gain needs to be added to the adult record.

Participant #2585769 – D. Dobbins

- Case note on 12/9 indicates the OJT check amount was incorrect. The OJT reimbursement was calculated at \$3,148.11 but the check request was for \$3,148. The check was written for \$3,148.11. The check was to be canceled and a check in the amount of \$3,148 was to be mailed to the employer on 12/30/22. The amount charged to LWP in the December cost report is for \$3,148.11 with an adjusted cost of -\$3,148. If LWP was only reviewing the December fiscal reports, this would result in a questioned cost. LWP determined that the case note did not accurately reflect the entire fiscal transaction.

Correction needed:

- The Case note and the original fund charged was not accurate. The case note needs to be corrected to reflect the fiscal records as follows:
 - East West Tea was paid \$3148 on 11/29/2022 for D Dobbins from Adult – P10K
 - East West Tea check was VOIDED on 12/7/2022 for D Dobbins – reports say DW but was changed to Adult on the final payment
 - East West Tea was paid \$3148.11 on 12/30/2022 for D Dobbins – again, reports say DW but was changed to Adult.

Participant # 4154505

- Measurable skill gain needs to be added to both the Adult and P10K record.
- There are no services provided since 2/27/23 – services need to be provided at least once every 30 days.

Participant #2565504

- Employment documented as \$22.25 per hour, case note indicates \$19 per hour – needs to be corrected.
- Measurable Skill Gain needs to be added to both DW and Work Ex record.

Participant #1726856

- Employment information needs to be entered in i-Trac

Participant #1485753

- Employment information needs to be entered in i-Trac

Participant #2295458

- Training service needs to be added to DWG as the payments were made from that fund.

Participant #3337242

- Document 11/30 Support Service payment of \$113.56 in i-Trac payment tab.
- Correct Employment start and end date information in all funds (DW, DWG, P10K)
- Enter training completion information in the services tab
- Document measurable skill gain in the assessment tab
- Provide explanation and documentation for the 12/1/22 refund of \$88.57 from Best Buy

Participant #2533473

- Correct Training Start Date in Service tab based on information provided in 2/7 and 2/13 case notes.
- iMatch banner does not indicate TANF/SNAP, documentation indicates agency record reviewed. Provide agency record or update the iMatch EDR with TANF/SNAP banner for cross-match purposes. (While this fund does not require priority of service, we should provide the documents when it is indicated that the participant falls within a priority/targeted population.)

Participant #2886181

- NOTE for observation: The OJT training plan was not signed by the employer until after the OJT start date. The plan needs to be signed by trainee and employer prior to the start date.

Participant #491714

- Enter employment end date in the DW outcomes tab.

Participant #4115777

- As noted above – customer is not eligible for DWG enrollment – all payments made must be charged to a fund for which the customer is eligible and customer needs to be removed from the grant.
- Measurable skill gain needs to be documented in both WIOA Adult and P10K fund

Participant #2392287

- Services are paid out of DWG but the training service is not entered in the fund – it needs to be entered.
- If the participant realized a measurable skill gain it needs to be added to DWG, DW, and P10K

Participant #2119324

- OJT end date case note needs to be corrected:
 - 10/24 case note states OJT completed
 - 11/28 case note states OJT completed on 11/1
 - OJT Completion documents state OJT completed on 10/24
- OJT mid-point/60-day progress report needs to be uploaded to eBridge

Participant #2591132

- Delete the duplicate employment record in the WEX record outcomes tab
- Add MSG outcome to the Adult record

Participant #2574650

- Delete the duplicate employment record in the P10K fund
- Add MSG outcome to the DW record

Participant #2589328

- Measurable skill gain needs to be added to adult record.
- Employment information needs to be added to adult record

- Sequence of case notes 10/26, 11/7, and 11/14 do not make sense. The 10/26 case note indicates OJT employment ended, the 11/7 case note asks how job is going, the 11/14 case note confirms termination of OJT employment. The case notes need to be corrected to reflect the accuracy of when the OJT employment ended.

Participant #1915319

- OJT employment needs to be ended in both the DW and P10K fund as OJT was terminated
- MSG needs to be documented in the DW fund

Participant #1739691

- All information needs to be copied over to the Driving Prosperity fund in i-Trac.
- There is no documentation on CDL credential attainment in eBridge.

Participant #166217

- Transfer to EDA fund still needs to be completed in i-Trac.
- Training credential/completion documents need to be uploaded to eBridge.

Participant #2591442 – D. Thomson

- Missing case notes and documentation for completion of CDL training.
- Transfer to EDA fund still needs to be completed in iTrac.

Participant #2308540 – C. Barrow

- Scholarship information in eBridge came in nearly two months after the initial award.
- Many of the scanned documents in eBridge are not legible and need to be rescanned.
- CDL attainment is missing in eBridge.
- Documentation supporting dislocated worker status is missing in the eBridge scholarship packet.

Participant #2553482 – C. Shaner

- Services dates are not accurately entered in each fund – there is a discrepancy that needs to be corrected.
- CDL training outcome needs to be documented in iTrac and supporting documents uploaded to eBridge.

Participant #2588427 – L. Trzop

- Case notes regarding payment amounts do not match actual payment – they must be consistent.
- The receipt in eBridge for the fiscal expense issued on 12/13 is not legible and needs to be replaced with one that is.
- Ebridge is missing documentation for CDL training outcomes.
- Request form for gas card issued on 1/3 needs to be added to eBridge.



**LANE COUNTY HEALTH & HUMAN SERVICES
RESPONSE TO ADULT/DW PROGRAM FILE MONITORING
PROGRAM YEAR 2023**

DATE OF RESPONSE: 6/16/2023

TO: Lane Workforce Partnership

Thank you for the opportunity to serve residents and businesses of Lane County through the provision of employment and training services.

RESPONSES TO REVIEW OF MONITORING QUESTIONNAIRE REGARDING POLICIES:

- Lane County will comply with both Lane County and Lane Workforce Partnership (LWP) policies as they relate to Confidentiality, Fraud, and Records Retention.
- Updated policies will be provided to LWP following review with Lane County Quality & Compliance.

FISCAL RESPONSES:

1. Accrued Expenditure Reporting specifically the delayed reporting of refunds and voided transactions.

Lane County Health & Human Services (HHS) will adhere to the 2023-2024 requirement to include General Ledger Documentation for both the Current Month invoiced and the Following Month through at least the 15th with each monthly invoice. HHS Admin will enter vendor credits within 5-10 business days once submitted to the LCHSFISC@lanecountyor.gov email address.

2. Budget to Actual Variances.

Lane County HHS disputes the Budget to Actual Variances fiscal finding as the expectation, to our knowledge, was not communicated until the WorkSource Lane Fiscal and Program Monitoring – Lane County HHS 2022-2023 Draft Desk Review was received on June 2nd, 2023 via email. The expectation, or requirement, to document “significant variances to budgeted totals” is not a term or condition of the “Contract for Workforce Development Services under the Workforce Innovation and Opportunity Act of 2014” nor outlined in the Federal Government’s Uniform Guidance (2 CFR Part 200).

Although Section 5: Compliance of the aforementioned contract, states, “the Subcontractor further agrees to comply with the management policies and program controls of the Lane Workforce Partnership implemented to carry out this program or project,” the expectation to detail an expenditure plan if budget to actual variance was greater than 5% was unknown to Lane County HHS.

3. Incorrect Reporting on the Schedule of Federal Awards

Lane County HHS is reviewing its Year-End (YE) close policies and procedures, accounting practices, and internal controls to correct reporting on the Schedule of Federal Awards. As the 2022-2023 Fiscal Year Ends June 30th, 2023, Lane County HHS will implement changes, if necessary, to YE policies and procedures,

accounting practices, and internal controls. Lane County HHS has notified the County Treasurer of the fiscal findings outlined in this report. Moss Adams, LLP will be notified when the 2022-2023 audit cycle begins.

PROGRAM FILE RESPONSE:

Response to “Overall Observations regarding state and accuracy of the records”.

We believe the accuracy of our data entry is impacted by 1) delay of fund being created in iTrac by the platform company combined with the need to deliver services and 2) lack of written instructions from the contractor on how to appropriately determine eligibility and what performance measures/payment to enter and where.

1) Delay of Fund in iTrac.

The WorkEx fund was received in October 2021, though the iTrac database was not updated for data entry until January 2022. This has occurred with both the P10k Fund and the Driving Prosperity fund as well. Each had a 3 month delay between service provision and updating iTrac. This delay in updating the iTrac database results in staff spending time on duplicate record keeping and data entry and increases the likelihood of data entry errors when staff enter retroactive data while also continuing to provide services and enter data for current services. An additional concern is customers being asked to complete additional eligibility information once iTrac is updated.

2) Lack of written instructions.

Lane County provides services for several funds. Each fund has different eligibility requirements, priority populations, performance measures, etc. that Lane County is required to track. In order to fully comply with our funder requirements Lane County has requested, but not received, written data entry instructions specific to iTrac for each fund for which we are currently responsible.

Examples of requests:

- Deanna has requested multiple times to Cindy Perry during weekly contractor meetings including providing examples of the Michigan Works WIOA Manual and Virginia Career Works Title 1 Manual.
- On 1/9/23, the STEP partners presented to WSET and LWP. Following this presentation, Deanna provided Ashely Espinoza with a copy of the STEP Service Provider Manual as an example of instructions the WIOA team would greatly benefit from having.
- On 2/9/23, Deanna met with Ashley to discuss the program and provided a sample of written instructions obtained from the Portland Workforce Investment Board for their service providers for the P10K fund. This was shared as an example of what our WIOA Team needs in order to confidently and accurately enter data.
- The Driving Prosperity fund was received 10/1/2022, WIOA staff received training from LWP/SOWIB on 4/5/2023 but not written instructions for iTrac or other electronic records management system.

Observations from PY 21 Which Continue to Persist in PY 22:

- Priority of Service – Following the PY21 monitoring, LWP provided training on Priority of Service Policy per Lane County request. The training request also included a request for written instructions on what documentation needs to be collected and where/how it is to be recorded as well as written instructions and examples of Priority of Service documents, which we have not received. Please also clarify whether this should be applied to every customer even when the fund does not require it.

- We believe the OJT team has done an excellent and timely job in delivering services this year. LCHHS will continue to gather progress reports and process invoices according to the OJT Manual process.
- Through case notes, staff will continue to tell the story of the customer’s journey with a focus on improving the areas identified in the report.

New PY 22 Observations:

- LCHHS will follow all LWP policies.
- LCHHS cannot find a policy on the LWP website* specific to Career Exploration.

See Excel Spreadsheet for response to: Eligibility, Gas Card Receipts, Support Services, and Records Corrections.

- All questioned costs have been justified and are allowable.
- See ATTACHMENT A for any supporting documentation for questioned costs.
- All iTrac revisions have been updated or will be updated by 6/30/23.

Monitoring Outcomes Summary:

- LCHHS will discontinue the practice of documenting the provision of a scholarship application as a service.
- Staff will continue to document, in case notes, 3 attempts to engage customers when there is a lack of response as discussed in the questionnaire.
- Staff will enter employment information in both case notes and outcomes tab.
- **NEED:** LCHHS requests written instructions on all data elements and which fund to utilize when there are multiple funds in which customers may be enrolled.
- LCHHS will follow new OJT policy regarding short training plans. **PLEASE SEND POLICY WHEN UPDATED.**
- LCHHS will follow gas card / mileage policy as described in monitoring report. **PLEASE SEND POLICY WHEN UPDATED.**

Performance Improvement Plan:

LCHHS will comply with the Performance Improvement Plan provided we have clearly written instructions and expectations from LWP. Written guidance will help to ensure that the WIOA team is set up for success in meeting and exceeding these expectations and that each party understands and agrees to said expectations.

We request:

- Written guidance on data elements and specific entry, eligibility determination, service provision, active case management, participant engagement, document collection, and fiscal reporting. It would be helpful if policies were combined into one manual with a table of contents for each subsection of the policy or policies. This would create ease in finding information.
- Written guidance to include a percentage or average by which files must be accurate upon review with the understanding that such items will be edited and corrected where needed.
- Written instructions presented at the File Monitoring Training with Cindy Perry including what data elements need to be entered in which fund when there are multiple funds (WIOA Adult / DW, P10K, and Driving Prosperity).

- Other items as identified as we move forward together.

Additionally, Lane County requests to be removed from the year-long Performance Improvement Plan if expectations are being met by the end of the 2nd quarter.

Thank you again for the opportunity to provide employment and training services to residents and businesses of Lane County. Please let me know if you have any questions or would like further clarification on any specific items in the report. We believe that a follow up meeting to our response would be the next logical step in moving forward in this work together.

Deanna Strachan-Wilson

Deanna Strachan-Wilson, Workforce Services Supervisor
Lane County Health & Human Services / Human Services Division



ADULT/DW PROGRAM FILE MONITORING

Final Report 6/29/23

Lane County Health and Human Services/Human Services Division

Program Year 2022

WIOA Adult/DW or Youth Program Service Provider:

Kachina Inman, Assistant Director

Kate Budd, Interim HSD Manager

Deanna Strachan-Wilson, Workforce Services Supervisor

Final Report:

On May 22, 2023, Lane Workforce Partnership completed the file monitoring of the WIOA Adult/DW Service Provider contract and issued the Draft Monitoring Report. Lane County Health & Human Services, Human Services Diversion submitted a response to the report on June 16, 2023.

Final Monitoring Results and Resolutions

PY 22 Records Requiring Corrections:

Contractor's plan is to have all records requiring corrections to be completed by June 30, 2023. This plan is accepted by Lane Workforce Partnership.

PY 22 Participant Records with Potential Questioned Cost:

Participant #1815386 – B. Bash

This record has been resolved as follows:

- Contractor provided an applicant statement regarding selective service registration. LWP has accepted this statement and approved the customer for services.
- Contractor provided a copy of the customer's hardship license from the DMV.

Participant #411577 – C. Jackson

This record needs the following resolutions:

- Payments to move from DWG Fire to WIOA Adult/P10K: SEE ATTACHED DETAIL OF INVOICE ADJUSTMENT
- Additionally, \$894.99 was paid for a laptop with no specific approval/explanation about exceeding the \$500 Computer Purchase Limit

Participants Issued Gas cards that were Missing Receipts

These records have been resolved as follows:

- Contractor provided a list of each file indicating either the receipt had been collected or case notes were added indicating the attempts to collect the missing receipts.

Participant #2295458 – K Henry

- 7/22/22 Support Service in the amount of \$90. The supporting document indicates the amount is \$105. Need documentation supporting actual amount paid.

This record is resolved as follows:

- Contractor provided an explanation of payment with supporting documentation.

Participant #3337242 – D. Huesca

- Supportive Service documented in i-Trac of \$24.99 on 11/30/23. There is no supporting documentation in eBridge.
- Cost report indicates a refund from Best Buy of \$88.57 on 12/1/23. There is no record of the refund in either i-Trac nor eBridge.

This record is resolved as follows:

- Contractor provided an explanation of payments and refunds with supporting documentation.

Participant #1739691 – K. Issertel

- Missing documentation for the processing fee of \$19.71 for child care payment on 1/4/23.

This record is resolved as follows:

- Contractor provided an explanation of payment with supporting documentation.

Participant #1669217 – B. Peais

- Driving Prosperity is still showing an over-expenditure of \$29.60 in the i-Trac record. Note: After request made to H&HS in January to accurately account for the expense, LWP reduced the payment to H&HS in March by \$29.60 to correct the over-expenditure.

This record is resolved as followed:

- Contractor moved the over-expenditure to P10K and corrected the iTrac record.

Incorrect Charges on the December Cost Report:

The following two records were not addressed in the Contractor's Response to the Draft Monitoring Report, but have been resolved per LWP Fiscal Records.

Participant #2585769 – D Dobbins

- D Dobbins payment was corrected on Dec 2022 Invoice to Adult prior to payment, no additional documentation needed

Participant #2588822 – A Hill

- A Hill payment was corrected on Dec 2022 Invoice to Adult prior to payment, no additional documentation needed.

PY 22 Monitoring Outcome:

Lane Workforce Partnership is placing the contractor on Correction Action and a Performance Improvement Plan for the entirety of PY 23/24. The Performance Improvement Plan will require the contractor to comply with the following:

1. Accurate cost and monthly program reports shall be submitted on time by the 25th of each month including accruals for expenditures and refunds. Each monthly cost report will include the General Ledger detail for both the current month and the subsequent month through the 15th as documentation of accruals.
2. LWP has updated the monthly Cost Reports to include a % of Budget Column, in order to maintain reasonable assurance that the Contractor is operating the program within the contracted budget amount and to verify that payments reflect the services provided.
3. Contractor will establish a written Payment Control Process including:
 - a. Verification by Employment Specialists before direct service payments (training, support services, OJT's) are authorized that requests comply with LWP Caps and Limitations.
 - b. Process used by Employment Specialists to collect prior approval to exceed caps and limitations.
 - c. Tracing of all payments for direct participant services ensuring:
 - i. timely collection of receipts from customers
 - ii. verification of actual payments made including the funding stream of payment.
 - d. Timeline to upload documentation and payment verification into Itrac and eBridge.
 - e. Process for the purchase, distribution and reconciliation of initial gas cards including the responsibilities of Employment Specialists in documenting the need(s) of their customers, the receipt of the cards by their customers and the collection of final receipts.
 - f. Verification that all direct service payments have been included on a monthly cost report in the approved funding stream.
 - g. Clearly defined roles and responsibilities including job titles.
4. Contractor shall comply with the contractual requirements to document all services in i-trac and upload all supporting documentation to eBridge within 72 hours of the provision of the services.
5. Complete a review of all participant records for accuracy of the data, eligibility determination, service provision, active case management, participant engagement,

document collection, and fiscal reporting. The review shall be completed no less than twice per customer enrollment. The first review is to be required at customer intake and eligibility. The second is recommended to take place prior to the customer exiting services. LWP recommends an additional review of the customer record at points in time in which funding is expended for the provision of customer services.

6. Contractor shall provide LWP with a quarterly report of the participant file review, due the 20th of the month following the end of each quarter (October, January, April, and July).

Workforce Development Board Strategic Plan And Workforce Development Boards Local Five-Year Plan

Informational Item

This item is to inform the Workforce Development Board and Lane Executive Board of the process by which the Board’s Strategic Plan and Local Plan will be updated for Program Year 2024 – 2028.

Background

The Workforce Innovation and Opportunity Act (WIOA) requires states and local boards to develop and update a local plan once every four years (known as the Local Plan). In Oregon, all Boards are on the same schedule, which requires updating the Local Plan for implementation in Program Year 2024. Simultaneously, in Lane County, the Workforce Development Board creates a Strategic Plan which guides the work of Lane Workforce Partnership (LWP) over the four-year period.

Process and Timeline

Lane Workforce Partnership will begin the development process in September 2023 with the convening of focus groups in each region of the county. The Final Local Plan is due to the State Workforce and Talent Development Board on March 18, 2024. Implementation shall begin on July 1, 2024. The timeline for the development of both plans is as follows:

Activity/Task	Timeline
Focus Group Sessions	9/15/23 – 10/30/23
Strategic & Local Plan Document Developed	9/8/23 – 1/2/24
30-Day Public Comment Period	2/1/24 – 3/2/24
Finalize Local Plan	3/2/24 – 3/17/24
Local Plan Due Date (Submit to WTDB)	3/18/24
Workforce Talent Development Board Evaluation Period	3/18/24 – 6/7/24
Workforce Talent Development Board Approval	6/14/24 (meeting date)
Governor’s Review and Approval Period	6/26/24 – 6/28/24
Local Board Notices Sent Out	7/1/24 – 7/12/24

Focus Group Sessions are planned to include:

- Two Metro Area Sessions
- One Rural (Cottage Grove) Session
- One Rural (Florence) Session
- One Metro/Rural (Springfield) Session
- One Rural (Junction City) Session

All Board members, local elected officials, businesses, community members & stakeholders, workforce service delivery partners, and economic development partners will be invited to attend the session of their choice.

Workforce Development Board Responsibility

A committee of the Workforce Development Board will be convened to participate in the process. Functions of the Workforce Development Board members throughout the development of both the Strategic Plan and the Local Five-Year plan shall include:

- Oversight of the process;
- Review and Approval of the draft documents;
- Ensure compliance with regulations;
- Ensure the voice of community is incorporated into the plans; and
- Development of metrics by which LWP staff and the Board members are held accountable to deliverables within the final plans.

Lane Workforce Partnership staff leadership is assigned to Cindy Perry, Director of Workforce Programs.



Vision

Lane County will have a trained workforce & individuals will have the knowledge & skills for career success.

Mission

Meet the workforce needs of employers & individuals through partnerships & innovation.

LWP Role

Catalyzer, Convener, Analyzer, Broker, Community Voice, Capacity Builder/Investor

STRATEGIC PLAN 2020-2024

LWP Goals

Strategies

Support Industry & Workers in a Constantly Changing Economy

1

Prepare workers for self-sufficiency employment in a new and changing economy.

2

Connect individuals to education, skill-building & employment opportunities in occupations most impacted.
[aging workforce, technology impacts]

3

Prepare our youth for future employment.

- Analyze worker self-sufficiency data driven by systemic challenges [e.g., housing, childcare, legislative policy].
- Be the community voice for individual workers seeking self-sufficiency employment.
- Broker relationships to create solutions to address identified systemic challenges.
- Build capacity to support innovative solutions by seeking incremental funds for investment.

- Invest in training programs, including on-the-job training, apprenticeship & customized training focused on replacement opportunities for youth/young adults in jobs most impacted by retirement & other types of projected worker shortages.
- Analyze the impact of AI/technology on worker displacement.
- Invest in career pathway models.

- Invest in proven strategies & partner with successful youth programs (e.g. Connected Lane County, Chamber Work Ready initiatives, High School CTE programs) to better align industry & education to increase student access to work opportunities.
- Be the community voice to improve policy makers understanding/willingness to remove apprenticeship pipeline barriers.

Move the Dial on Systemic Challenges

4

Catalyze the community around diversity, equity and inclusion (DEI) to expand workforce leadership & participation opportunities for all.

5

Align strategic partnerships to expand our collective capacity to address systemic workforce challenges.
[housing, childcare, legislative policies]

- Be a catalyst for systemic change that raises DEI to the level of sector strategy.
- Convene an advisory board as a model of DEI leadership.
 - Research & evaluate DEI "state of workforce."
 - Gather & disseminate learning.
- Invest in workforce board training to understand unconscious bias & to lead by example.
- Embed DEI in all LWP policies.

- Continue to invest in sector strategy work.
- Analyze impacts of technology on industry employment & on workforce training.
- Identify & share job skills with current & emerging workforce.
- Analyze, gather & disseminate projected data about job evolution/changes/growth.
- Be the voice to create understanding of self-sufficient wages in our community.





Lane Workforce Partnership Workforce System Year-End Performance Report

July 1, 2022 – June 30, 2023

System performance partners include:

- Department of Human Services
- Lane Community College
- Lane Workforce Partnership
- Oregon Employment Department
- Vocational Rehabilitation Services



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Introduction:

Lane Workforce Partnership (LWP) is the designated local Workforce Development Board for Lane County, Oregon. The local board is charged with making targeted investments in the community utilizing funding in line with its mission: *To meet the workforce needs of employers and individuals through partnership and innovation.*

This report is a compilation of outcomes achieved through two primary investments in Lane County: 1) **Adult and Dislocated workforce services**; and 2) **At-Risk Youth/Young Adult programs**.

WorkSource Oregon Lane is the primary location in which Lane Workforce Partnership invests federal funds to deliver employment services to adults and dislocated workers. Lane Workforce Partnership has distributed \$1,596,953.02 to Lane County Health and Human Services for the period of July 1, 2022, through June 30, 2023, for program services throughout Lane County.

In addition to the funds invested by Lane Workforce Partnership, the following partners invest funds and resources each year through a committed partnership to create a strong workforce system for Lane County:

- Department of Human Services
 - Self-sufficiency Programs
 - Vocational Rehabilitation Services
- Lane Community College
- Oregon Employment Department
- Easter Seals of Oregon

LWP contracts with Connected Lane County to serve at-risk youth and young adults in Lane County. The primary focus of this investment is to create or expand programs that will increase the graduation rates, connect youth to higher education opportunities, and expand work experience opportunities. LWP invested \$903,431.75 in federal funds targeted to serve at-risk youth. Connected Lane County expanded their service locations this year with the opening of Spark at Booth Kelly in Springfield.

During the development of the [2020-2024 local strategic plan](#), specific goals and strategic objectives were developed to align the work of the LWP with the work of Oregon Workforce and Talent Development Board within the context of Lane County's local economic and workforce environment.

Year-End Performance Report July 1, 2022 – June 30, 2023

This report serves as documentation of the effectiveness of workforce development services, and the implementation of the Local Strategic Plan. Elements from this report will be updated semi-annually and posted on the Lane Workforce Partnership's website.

Note: The following strategies related to Goals 2 and 5 are a continuous work in progress that require ongoing research:

- Goal 2 (Strategy 2): Analyze the impact of AI/technology on worker displacement.
- Goal 5 (Strategy 2): Analyze impacts of technology on industry employment and on workforce training.
- Goal 5 (Strategy 4): Analyze, gather, and disseminate projected data about job evolution/changes/growth.

The constantly changing landscape of technology in the workforce warrants constant and in-depth review. The 2022 State of the Workforce Report addresses the labor market in Lane County with an analysis of projected changes and growth in Lane County's industries. The report also focuses on the people who are in the workforce. With the evolution of artificial intelligence and its impact on the workforce, what we are seeing is that workers continue to be in high demand. Increased automation and the use of robotics seems to have enhanced many jobs rather than eliminated them. The integration of artificial intelligence and human interaction is one companies seem to embrace as they continue to evolve their product lines.

Program Year 2022/2023 Goals and Progress Measures

Goal 1: Prepare workers for self-sufficiency employment in a new and changing economy.

Strategies:

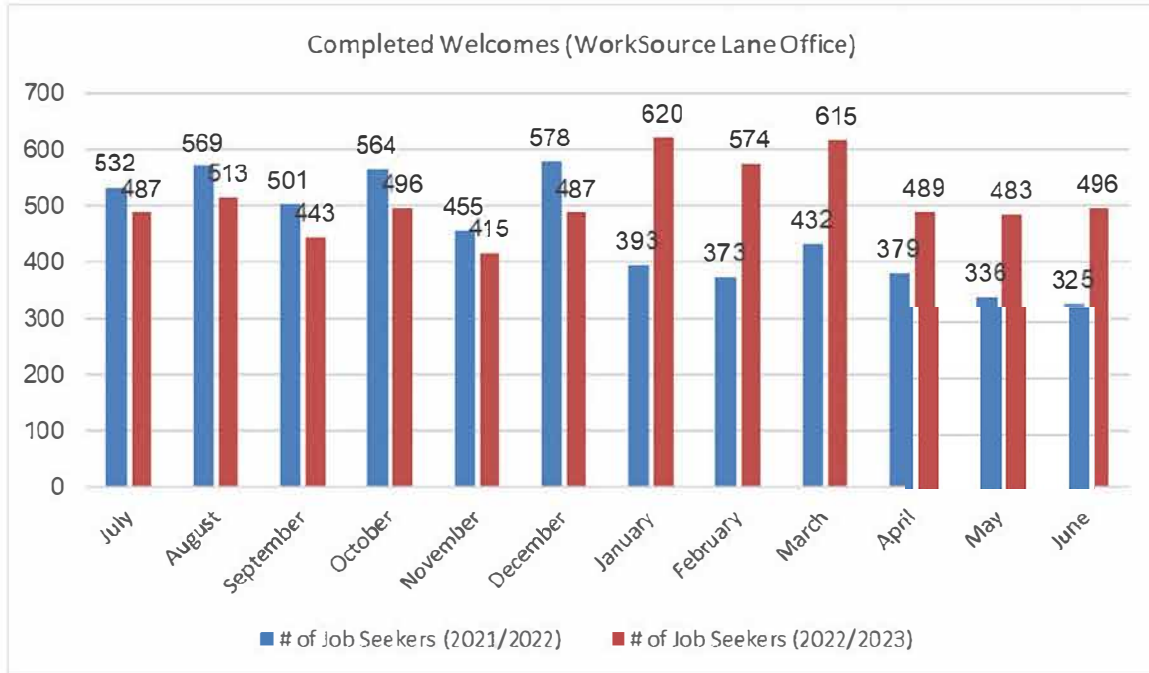
1. Analyze worker self-sufficiency data driven by systemic challenges (e.g., housing, childcare, legislative policy).
2. Be the community voice for individual workers seeking self-sufficiency employment.
3. Broker relationships to create solutions to address identified systemic challenges.
4. Build capacity to support innovative solutions by seeking incremental funds for investment.

Progress Measures:

- Performance Outcomes for WIOA Youth, Adult, and Dislocated Worker programs
- Fund development
- Analysis of Lane County's economy as published in the [2022 State of the Workforce Report](#)

WorkSource Lane Personalized Services for Job Seekers in Targeted Industries

The first step toward receiving services at the WorkSource Center is to have a “Welcome” Conversation with staff. During the welcome conversation, customers are informed of the services available to them. From July 2022 to June 2023, 6,046 new customers came into the Center seeking services. This number increased by 1,568 customers compared to the prior 2021/2022 year’s total.



Performance Outcomes for WIOA Programs

WIOA Youth Performance

Measure	Program Year 2022		
	Goal	Actual Q4	Percent of Goal
WIOA Youth			
Employment Rate Q2	73.3%	65.3%	89.1%
Employment Rate Q4	78.6%	67.4%	85.8%
Median Earnings Q2	\$4,604	\$5,654	122.8%
Credential Attainment Rate	66.9%	55.9%	83.6%
Measurable Skill Gain	48.3%	39.3%	81.4%

WIOA Adult Performance

Measure	Program Year 2022		
	Goal	Actual Q4	Percent of Goal
WIOA Adult			
Employment Rate Q2	73.4%	77.3%	105.3%
Employment Rate Q4	69.8%	76.2%	109.2%
Median Earnings Q2	\$7,160	\$9,507	132.8%
Credential Attainment Rate	89.2%	87.2%	97.8%
Measurable Skill Gain	83.8%	46.5%	55.5%

WIOA Dislocated Worker Performance

Measure	Program Year 2022		
	WIOA Dislocated Worker	Goal	Actual Q4
Employment Rate Q2	74.4%	73.4%	98.7%
Employment Rate Q4	71.6%	70.9%	99.0%
Median Earnings Q2	\$7,461	\$9,636	129.2%
Credential Attainment Rate	90.9%	80.8%	88.9%
Measurable Skill Gain	89.7%	35.7%	39.8%

Business Engagement Services

- WorkSource Lane Staff Assisted Hires from Job Postings – resulted in 111 hires
- WorkSource Lane Business Engagement Events – 42 events with 179 participating businesses
- Number of Businesses Participating in OJT and Work Experience – 59

Fund Development

PY 2022/2023 Fund Development

July 1, 2022 – June 30, 2023				
Lane County ARPA	Lane County	July 2022	\$500,000	Not Selected
RISE Grant	Dept. of Ag.	April 2023	\$599,000	Pending
Future Ready/Work Ready – Broadband	HECC/Oregon	June 22, 2023	\$963,241	Pending
Future Ready/Work Ready – CT	HECC/Oregon	June 22, 2023	\$993,050	Pending

Prosperity 10K Year 1 Impacts
July 1, 2022 – June 30, 2023

Training/Service Provider	Training Program or Service	Number of Businesses Participating	Number of Individuals Participating
Industry Wide Training Projects			
Onward Eugene	RISE Bootcamp	26	39
OMEP	SMART Training	6	39
Lane ESD	Teacher Bootcamp	17	21
Springfield Chamber	Essential Skills Train the Trainer	24	40
TAO	Organizational Wellbeing and Transforming Organizations through HR and Upskilling Women	27	35
Season to Taste	Growing People Program	5	14
Total		105	188
Customized Training Programs			
Babb Construction	Heavy Equipment Operators	1	12
Pearl Buck Center	Job Coaches	3	30
Gheen Irrigation	Robotic Welding	1	10
Lanz Cabinets/CCS	Manufacturing	1	32
Total		6	84
Career and Training Services Programs			
Health & Human Services	On-the-Job Training	19	44
Health & Human Services	Scholarship Training	N/A	28
Health & Human Services	Career Services	N/A	94
Health & Human Services	STEP Program	N/A	211
Total		19	377
Total All Projects			
		130	649

**Industry-Wide Training Future Ready Oregon/Prosperity 10K Expenditures
Spent through June 30, 2023**

Applicant Name	Amount Spent
Lane ESD	\$41,150.00
OMEP	\$50,000.00
Onward Eugene	\$32,791.19
Springfield Chamber	\$44,686.00
Season to Taste (Eugene's Table)	\$30,000.00
TAO	\$50,000.00

**Customized Training Future Ready Oregon/Prosperity 10K Amount
Spent through June 30, 2023**

Applicant Name	Amount Spent
Babb/Delta Construction	\$72,750.38
RiverBend Materials	-
Pearl Buck Center	\$53,760.00
Catholic Community Services/Lanz Cabinets	\$51,109.65
Gheen Irrigation Works	\$22,450.00
Trip N Transport	\$5,053.00
Tyree Oil	\$41,023.00

Additional Future Ready/Prosperity 10K Amount Spent through June 30, 2023

Applicant Name	Amount Spent
Training and OJT's (WorkSource Lane)	\$305,353.39
Youth Transportation and Spark Lab	\$150,000.00
SNAP/STEP Customer Support Services	\$123,268.73
Dell Hubs (WorkSource Lane)	\$35,709.60

	Amount Spent
TOTALS	\$1,109,104.94

Driving Prosperity
Awarded \$896,873

Applicant Name	Contracted	Amount Spent
Lane County	\$130,000.00	\$128,138.16
Babb/Delta Construction	\$65,000.00	\$30,470.01
Wildish	\$26,000.00	\$25,460.00
Tyree Oil	\$22,000.00	\$22,000.00
Spring Creek	\$15,564.00	\$15,564.00

Driving Prosperity
October 2022 – June 2023

Lane Workforce Partnership partnered with the Southern Oregon Workforce Investment Board on a Good Jobs Challenge grant through the Department of Commerce. The project, Driving Prosperity, will train 100 commercial truck drivers in Lane County over a two-year period.

Year to Date Goal	Year to Date Actual	Year One Goal	Year Two Goal	Total Contract Goal
50	38	50	50	100

Oregon Health Authority HOWTO Program

Lane Workforce Partnership partnered with Nurturely and received funding from Oregon Health Authority HOWTO program. The goal of this project is to promote perinatal health equity through the certification, inclusion, and sustainability of Black, Brown, Indigenous, and Spanish-Speaking doulas in the Lane County workforce. Our project will increase racial and cultural inclusion in the current healthcare systems, by bolstering the diversity of the Doula workforce through Doula Training, Doula Transition, Doula Sustainability, and Doula Support.

Applicant Name	Awarded	Amount Spent
Nurturely	\$910,776.00	\$188,264.33

Note: The grant period is July 1, 2022, through June 30, 2025.

Nurturely Performance through June 30, 2023

Doula Training Total Contract Enrollment Goal	Planned Performance through 6/30/23	Actual Performance through 6/30/23
45	10	8

Note: Nurturely is planning two cohorts for Program Year 2023/2024, which will result in enrollments being at or above target by the end of year two of this project.

Goal 2: Connect individuals to education, skill-building, and employment opportunities in occupations most impacted.

Strategies:

1. Invest in training programs, including on-the-job training, apprenticeship and customized training focused on replacement opportunities for youth/young adults in jobs most impacted by retirement and other types of projected worker shortages.
2. Analyze the impact of AI/technology on worker displacement.
 - a. See notes related to this strategy addressed in Goal 5 (page 16)
3. Invest in career pathway models.

Progress Measures:

- Training investments (All Partners' Programs)

Training Investments (All Partners' Programs)

WorkSource Lane Workforce Innovation and Opportunity Act Scholarship Award
July 1, 2022 – June 30, 2023

Measure	Goal	Number/Percent Achieved
# of training scholarships awarded	30	31/103% of goal (15 adult/16 DW)
# of training scholarships awarded by industry		Health Care: 16 Truck Driving: 3 Information: 3 Manufacturing: 3 Other: 6
# of individuals completing training	22.5 (75% of 30)	20/89% of goal
# and % of training completers placed in training related employment	None indicated	13/65%

WorkSource Lane On-the-Job Training Program (OJT)
July 1, 2022 – June 30, 2023

Measure	Goal	Number Served
# of OJT placements	56	63/112% of goal (36 Adult/27 DW)
# of businesses with OJT		18
# OJT placements with new businesses		36 placements with 10 new businesses
# of OJT placements by target industry		Health Care: 13 Information: 1 Manufacturing: 23 Construction & Aggregate: 5 Transportation: 15 Other: 6
# of OJT placements \$15.00/hr. - \$16.99/hr.		\$15.00 - \$16.99: 9
\$17.00/hr. - \$19.99/hr.		\$17.00 - \$19.99: 35
\$20.00/hr. or more		\$20+: 19

Adult Work Experience (Work Ex) Program

Work Ex Tuition

Outcome	Number Achieved
# of trainings funded	7 trainings funded
	7 trainings started
	2 Healthcare/5 Truck Driving
# of individuals completing training	5 (sixth individual will complete in August 2023)
# of training completers placed in training related employment	4
Employment Confirmation (At Exit)	12

Work Ex Internship (Work Experience)

Outcome	Number Achieved
# of participants in Work Experience training	9 new individuals started work experience
	9 individuals completed work experience
	0 still in progress
Target Industry	Truck Driver/Transportation: 2 Health Care: 4 Construction & Aggregate: 1 Manufacturing: 1 Welding: 0 Other: 1 (Food & Beverage)
Wages of Work Experience placements at \$13.50+	All placements were above \$15/hr. Average: \$17.79/hr.
% of training completers placed in training related employment	67% of completers obtained training related employment. Average wage: \$20.12/hr.

Work Ex On-The-Job Training (OJT)

Outcome	Number Achieved
# of participants in Work Ex OJT	8 participants started
	11 participants ended WorkEx OJT
	9 completed training
Target Industry	Truck Driver/Transportation:3 Health Care: 0 Construction & Aggregate: 0 Manufacturing: 2 Welding: 0 Tech: 1 Other: 2
Wages of OJT placements at/above \$15.00	100% were at or above \$15.00/hr. Average: \$21.60/hr.

Workforce Partner Investments July 1, 2022 – June 30, 2023

Department of Human Services – JOBS Program

Measure	Total
# of JOBS Plus placements	12
# of businesses participating in JOBS Plus	8
# of work experience placements	17
# of businesses participating in work experience	11
# of Vocational Training Completions	57
# of Vocational Training Completers Placed in Employment	38
Average Wage at Employment for Vocational Training Participants	\$19.52/hr.

Lane Community College – Title II

Measure	Total
# of individuals achieving an increase in skill gains in reading	121
# of individuals achieving an increase in skill gains in math	61
# of individuals earning a GED	49
# of individuals achieving an increase in skill gains in listening	31
# of individuals achieving an increase in skill gains in speaking	39

Special Projects

Fire Dislocated Worker Grant (DWG) – The State of Oregon was awarded a DWG from DOL in response to the devastating wildfires during the summer and early fall of 2020. The purpose of the funds is to assist the impacted communities in Lane County with fire restoration, recovery, and cleanup efforts.

LWP released an application for community stakeholders to request funds which they were able to use to employ humanitarian workers or work crews whose sole purpose was to work on projects related to fire restoration, recovery, and clean-up. LWP entered into Service Agreements with:

- McKenzie Community Development Corporation (Humanitarian Workers)
- Love First (Humanitarian Workers)
- Northwest Youth Corps (Fire Restoration and Clean-up)
- Suulutaaq Construction (Fire Restoration and Clean-up)
- Cascade Relief (Both Humanitarian Workers and Fire Restoration and Clean-up)

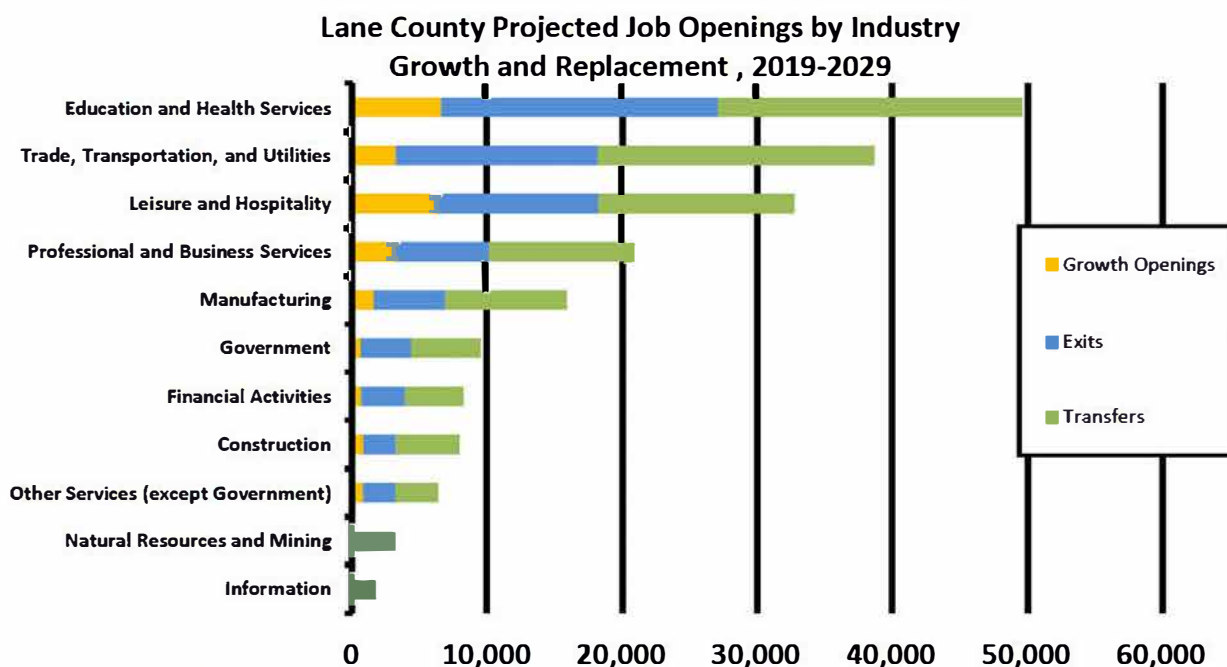
Each of the above service agreements were completed and closed as of September 2022. In addition to the above, Lane County Health & Human Services provided eligible participants with career and training services through WorkSource Lane. Lane County Health & Human Services continues to provide these services to actively engaged customers.

DWG Performance to Date

Enrollment Goal	Actual Enrollment to Date
200	205

Research Impact of Aging/Retiring Workforce

In partnership with Oregon Employment Department’s economist, Lane Workforce Partnership staff published the 2022 State of the Workforce Report for Lane County. This report outlines the impact of the aging workforce in Lane County as well as the industries that are expected to have a large number of replacement job openings. Replacement openings are often a result of retirements.



Goal 3: Prepare our youth for future employment.

Strategies:

1. Invest in proven strategies and partner with successful youth programs to better align industry and education to increase student access to work opportunities.
2. Be the community voice to improve policy makers understanding/willingness to remove apprenticeship pipeline barriers.

Progress Measures:

- Create and track outcomes for multiple Lane County industry awareness and work-based opportunities for middle/high school and community college students.
- Identify individual sector’s apprenticeship barriers and chart progress of measurable results to overcome these barriers.

Connect Industry Workforce Needs to Education – LWP partners with Elevate Lane County to coordinate industry awareness for students, teacher externships, and work-based learning opportunities.

Measure	Number Served
# of Lane County students participating in industry tours	426
# of participating industry sectors in tours	3 Manufacturing x 6 companies; Natural Resources x 3 companies; Tech x 6 companies
# of Lane County schools participating in industry tours	22
# of Lane County students participating in DevNW Financial Foundation courses	169
# of Lane County students participating in the 2022/2023 Middle School Career Expo	462
# of Lane County schools that participated in the 2022/2023 Middle School Career Expo	12
# of Lane County businesses represented at Career Expo	28
# of Lane County students participating in the Hiring Fair	250
# of Lane County schools that participated in the Hiring Fair	25
# of Lane County businesses represented at the Hiring Fair	35
# of students participating in job shadows	154
# of students participating in a mentorship with industry	9
# of high school teachers participating in an externship	6
Industry sectors participating in externships	4*
# of high school students participating in an internship	63
Industry sectors participating in internships	14**
# of high school students participating in a micro internship	7
Industry sectors participating in micro internships	2***

*Culinary; Tech; Manufacturing; Construction

**Manufacturing; Tech; Healthcare; Education; Natural Resources; Arts; Marketing; Business; Automotive; Construction; Law; Government; Early Childhood Education; Social Services

***Manufacturing and Tech

Additional Information

Measure	Number Served
School Presentations:	
• # of presentations: 8	
• # of students: 735	
• # of high schools: 7	
• # of middle schools: 0	
• # of industry representatives: 25	
# of Lane County schools participating in codeORcreate (student tech hackathon)	12
# of Lane County students participating in codeORcreate	36
# of participating industry reps in codeORcreate	12
# of Lane County schools participating in marketingJAM	10
# of Lane County students participating in marketingJAM	32
# of participating industry reps in marketingJAM	11
# of Lane County youth participating in MFG Tech Excelerator	11
# of Lane County industry reps participating in MFG Tech Excelerator	6
# of Lane County youth participating in Youth Support Specialist Training	23
# of Lane County youth participating in Wonder Wednesday Life Skill Building Workshops	220
# of WIOA Youth/Young Adults served	281

Testimonial

Jack has been in the WIOA/Navigate program less than a year and has really enjoyed the events in which he has participated. Jack had this to say about DevNW and the WIOA Job Shadow: “Both of the experiences were very insightful on things I didn’t know about and wanted to know about. The homeowner’s class was very interesting. I learned things I never would have thought of when considering buying a home of my own and the job shadow at the radio station was very cool, learning about all the jobs and inner workings of a radio station.” – Connected Lane County

Through events that the WIOA/Navigate program has been able to put on, DJ has blossomed from a very shy youth into someone who feels more confident and asks questions. They have started engaging more actively and advocating for themselves and have found their experience in the program to be “helpful in finding jobs, building resumes and cover letters, and very clearly the staff cares about the wellbeing of the youth and wants to see them succeed.” – Connected Lane County

WIOA Youth/Young Adult Paid Work Experience Opportunities

Measure	July 1, 2022 - June 30, 2023
# of WIOA youth/young adult participating in a work experience	101
# of youth/young adult who completed an internship and achieved positive evaluations	12

Testimonial

Ocean entered the program with a strong desire to secure employment near her remote rural residence, which she shared with her grandmother. Faced with limited options and lacking transportation, she encountered challenges in her job search. The WIOA/Navigate program connected her with a nearby farm, where she embarked on a work-based learning experience focused on honing her equine and animal husbandry skills. Ocean fell in love with the work, re-engaged with school, and joined the FFA program. She had this to say about her experience: “It was helpful and encouraging and gave me more experience around equine care and helped me be more confident in what I’m doing.” – Connected Lane County

Fred has found immense value in the work experience opportunities he has been fortunate to engage in. These experiences have allowed him to explore options he had not previously considered, and he appreciates the opportunity to acquire new knowledge. He said his favorite part is “getting to learn about the local workplaces and opportunities in a fun and ideal environment.” – Connected Lane County

Oregon Youth Employment Program

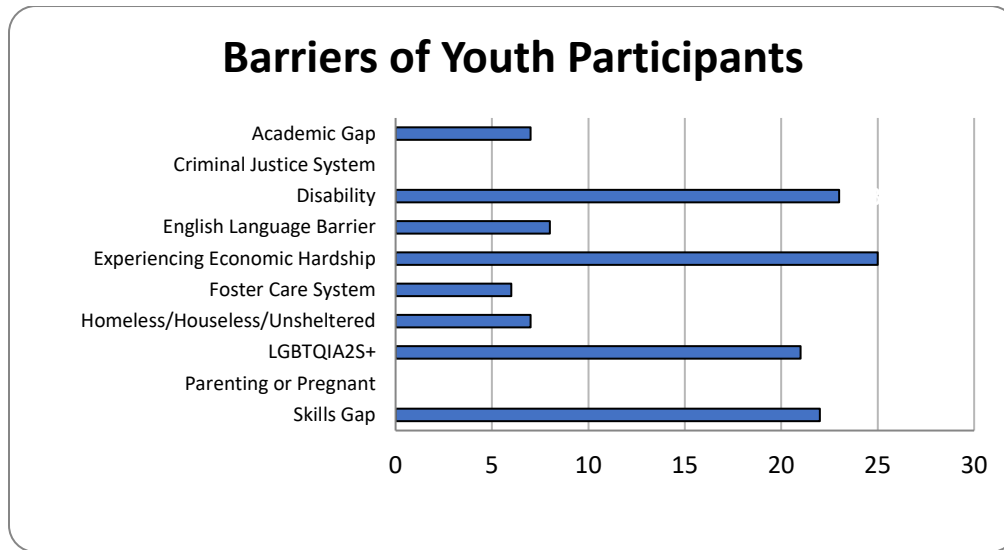
Lane Workforce Partnership was awarded \$767,914.00 from the Higher Education Coordinating Commission (HEC) for the Oregon Youth Employment Program (OYEP) for Program Year 2022/2023.

The focus of the Oregon Youth Employment Program is to serve youth and young adults ages 14 – 24 through work-based learning opportunities including paid internships, pre-apprenticeship training, occupational skills training, and other workforce services in three high wage/high demand sectors: construction, manufacturing, and technology. LWP entered into a Service Agreement with Connected Lane County for Program Year 2022/2023.

OYEP Performance July 2022 – June 30, 2023

Enrollment Goal	Enrollment through June 30, 2023
82	82

Youth Served in OYEP were the most marginalized in our community. The following chart demonstrates the barriers of those who participated in the program:



Goal 4: Catalyze the community around diversity, equity, and inclusion (DEI) to expand workforce leadership and participation opportunities for all.

Strategies:

1. Be a catalyst for systemic change that raises DEI to the level of sector strategy.
2. Convene an advisory board as a model of DEI leadership.
3. Invest in workforce board training to understand unconscious bias and to lead by example.
4. Embed DEI in all LWP policies.

Progress Measures:

- Increase service utilization among targeted populations
- All LWP policies will contain DEI and Equity Lens language and requirements
- LWP staff and Board members receive diversity, equity, and inclusion training as well as the establishment of an advisory board

Every two years, LWP releases a State of the Workforce Report. This report provides readers with information about the current state of Lane County's economy. The theme of the 2022 State of the Workforce Report is about the people currently in the workforce – who they are and how our businesses can tap into their talents.

- [2022 State of the Workforce Report \(English\)](#)
- [2022 State of the Workforce Report \(Spanish\)](#)

Each year, LWP reviews and updates its policies and procedures to ensure they are current and meet the requirements of federal and state legislation. These policies are also developed to align with the goals set by the Workforce Development Board. Lane Workforce Partnership's current policies and procedures (both in English and Spanish) can be found on our website.

- [Lane Workforce Partnership Policies](#)

Increase Service Utilization Among Targeted Populations

Targeted Outreach Activities

The Equity and Inclusion Task Team set a priority around increasing outreach activities to under-represented populations for services available at WorkSource Lane, specifically WIOA training scholarship opportunities. Staff created and implemented the outreach plan.

Scholarship Application Completed (July 2022 – June 2023)						
	Minority Groups	50+	Veterans	Women	Disabilities	Offenders
2020/2021	12 (29%)	12 (29%)	3 (7%)	22 (54%)	3 (7%)	6 (15%)
2021/2022	12 (38%)	8 (25%)	3 (9%)	15 (47%)	4 (12%)	7 (22%)
2022/2023	13/46 (28%)	5/46 (11%)	1/46 (2%)*	28/46 (61%)	8/46 (17%)	7/46 (15%)

Scholarship Application Awarded (July 2022 – June 2023)						
	Minority Groups	50+	Veterans	Women	Disabilities	Offenders
2020/2021	9 (28%)	11 (34%)	3 (9%)	15 (47%)	1 (3%)	4 (13%)
2021/2022	14 (31%)	13 (29%)	3 (6%)	26 (59%)	5 (11%)	7 (15%)
2022/2023	9/33 (27%)	1/33 (3%)	0/33 (0%)*	23/33 (70%)	4/33 (12%)	5/33 (15%)

*The overall program served a total of 26 Veterans in 2022/2023 for a total of 6% served. Of those, 67% received training services. This number was obtained from WorkEx, Driving Prosperity, and OJT to demonstrate that while no Veterans received a WIOA scholarship, efforts were made to provide training through other methods. This could be done with all demographics to provide a larger picture of the overall training services being provided to these groups.

Demographics of Populations Served through WorkSource Lane: Eugene and Florence July 2022 – June 2023

Measure	Number Served	%
# of disabled individuals served	1,240	13.3%
# of minority populations served (e.g., Hispanic, Native American, Asian, Pacific Islander, African American)	2,216	23.7%
# of individuals 45 – 54	1,819	19.5%
# of individuals 55+ served	1,583	17.0%
# of Veterans served	693	7.4%
# of Veterans placed in employment – Targeted Sectors	2	.0002%
# of disabled Veterans placed in employment – Targeted Sectors	2	.0002%

**Demographics of Populations Served through Lane Community College (LCC) – Title II
July 2022 – June 2023**

Measure	Number Served	%
# and % of disabled individuals served	121*	8.6%
# and % of minority populations served	585	60%
# and % of individuals ages 50+ served	166	11.6%
# and % of ex-offenders served	121	8.6%
# of Veterans served	5	>1%

*Number of disabled students is based on information self-reported during the intake process and includes physical, learning, and other disabilities.

Other notable LCC information Program Year 2022 – 2023 (July 2022 – June 2023)

Measure	Number Served
# of homeless	83
# of long-term unemployment	77
# of single parents	121
# of displaced homemakers	19

WIOA Youth/Young Adult Program (June 2023)
Current Enrolled Participants: 281

CATEGORIES	PERCENTAGE
SEX	
Female	53.0%
Male	43.1%
Not Disclosed	3.9%
RACE	
White	74.0%
More than one race	12.5%
Not Disclosed	6.8%
American Indian or Alaskan Native	3.2%
Black/African American	2.5%
Asian	.7%
Native Hawaiian or Other Pacific Islander	.4%
ETHNICITY	
Not Hispanic/Latino a/x	67.3%
Not Disclosed	16.7%
Hispanic or Latino a/x	16.0%
DISABILITY	
Not Disabled	43.8%
Disability	40.9%
Not Disclosed	15.3%
SCHOOL STATUS	
Out of School	76.9%
In-School	23.1%
HIGHEST EDUCATION LEVEL COMPLETED	
Did not complete HS Diploma/GED/Equivalent	58.4%
High School Diploma	35.2%
GED	6.1%
Completed one or more years of post-Secondary education	.3%
BASIC SKILLS STATUS	
Deficient in Basic Literacy Skills	84.7%
Not Deficient	15.3%
EMPLOYMENT STATUS	
Not Employed	87.2%
Employed	12.8%
INCOME	
Low Income	94.3%
Not Low Income	5.7%
AGE AT PARTICIPATION	
18+	60.5%
17 and below	39.5%

WIOA Adult/Dislocated Worker Program (June 2023)
Current Enrolled Participants: 190

CATEGORIES	PERCENTAGE
SEX	
Female	52.6%
Male	45.8%
Not Disclosed	1.6%
RACE	
White	76.7%
Not Disclosed	10.5%
Black/African American	5.8%
More than one race	3.7%
Asian	1.1%
American Indian or Alaskan Native	1.1%
Native Hawaiian or Other Pacific Islander	1.1%
ETHNICITY	
Not Hispanic/Latino a/x	78.4%
Hispanic or Latino a/x	14.8%
Not Disclosed	6.8%
VETERAN STATUS	
Never Served	96.3%
Veteran	3.7%
UNEMPLOYMENT INSURANCE	
Not a Claimant or Exhaustee	69.5%
Claimant	25.8%
Exhaustee	4.7%
HIGHEST EDUCATION LEVEL COMPLETED	
Did not complete HS Diploma/GED/Equivalent	4.7%
GED	2.7%
High School Degree	37.9%
Post-secondary technical/vocational certificate	5.8%
Completed one or more years of post-Secondary education	12.1%
Associate degree	15.3%
Bachelor's degree of equivalent	16.8%
Education beyond Bachelor's degree	4.7%
EMPLOYMENT STATUS	
Not Employed	63.7%
Employed	36.3%
INCOME	
Not Low Income	58.9%
Low Income	41.1%
AGE AT PARTICIPATION	
18 – 25	15.8%
26 – 40	32.1%
41 – 55	31.6%
56+	20.5%

Vocational Rehabilitation Services Workforce Metrics

Measure	Number Served
Total number served 7/1/22 – 6/30/23	1,554*
Total number with Employment Outcome	245**

*Eugene: 865/Springfield: 689

**Eugene: 152/Springfield: 93

“Employment Outcome” means that the person with a disability has obtained a job, all accommodations are in place, the job is going well, and the individual has maintained that employment for a minimum of 90 days and the job is not expected to end in the foreseeable future.

Goal 5: Align strategic partnerships to expand our collective capacity to address systemic workforce challenges.

Strategies:

1. Continue to invest in sector strategy work.
2. Analyze impacts of technology on industry employment and on workforce training.
3. Identify and share job skills with current and emerging workforce.
4. Analyze, gather, and disseminate projected data about job evolution/changes/growth.
5. Be the voice to create understanding of self-sufficient wages in our community.

Progress Measures:

- Annual investments specific to each industry sector

Community Engagement and Industry Sector Partnerships

Lane Workforce Partnership continues to focus on sector strategies, investing funds in talent development, job creation, and business competitiveness in targeted sectors such as Technology, Food and Beverage Manufacturing, Wood Products, Construction-Aggregate, Transportation, Creatives, Child Care, and the recently launched Bioscience Sector.

Sector Name	Next Gen Step (Planning, Implementing, Sustaining)
Technology	Sustaining
Bioscience	Implementing
Food and Beverage	Sustaining
Childcare	Implementing
Transportation	Implementing
Construction-Aggregate	Sustaining
Creatives	Planning
Wood Products	Planning

Targeted Sector investments of \$101,480 were made from July 1, 2022 – June 30, 2023. The following projects would not have been possible without collaboration from community partners:

- Lane County Latino a/x Leaders Workgroup received an Oregon Community Foundation (OCF) grant awarded through Lane Workforce Partnership.
- Eugene Chamber of Commerce Unhoused Workforce Project is a Chamber-led collaboration with Lane Community Health Council.
- The Springfield Chamber Work Ready Initiative is an on-going partnership with the City of Springfield and Chambers Construction.
- Leading with Cultural Intelligence cohorts were provided in partnership with the Technology Association of Oregon and the Lane County Human Resources Association (LCHRA).

Targeted Sectors	Funds Expended
Food & Beverage (Connected Lane County – Accelerator to Culinary Program)	\$30,000
ALL (Eugene Chamber Unhoused Workforce Project)	\$25,000
ALL (TAO – Leading with Cultural Intelligence)	\$ 9,500
Creative (Arts & Business Alliance)	\$ 8,000
ALL (State of the Workforce – Printing and Translation)	\$ 6,987
ALL (CEDO – Data Collection – Entrepreneurs and Women’s Innovation Network)	\$ 5,000
Transportation (Aisling Trucking Academy – Gravel for Parking Lot)	\$ 5,000
ALL (Next Gen 101 Workshop Registrations)	\$ 3,918
ALL (Springfield Chamber Work Ready Initiative)	\$ 2,500
ALL (Centro Latino - Sponsorship)	\$ 2,000
ALL (Latino Professional OCF-YP Summit/Leadership Eugene-Springfield)	\$ 1,975
ALL (Eugene Chamber – Celebration of Business)	\$ 1,600
TOTAL	\$101,480

Industry Engagements

In August 2022, Onward Eugene was named Lane Workforce Partnership’s business service provider. Through this expanded partnership, Onward Eugene engaged regional industries essential in our local economy, in proven programs and initiatives that accelerated high wage job growth. Onward Eugene provided Sector Strategy leadership and support to community stakeholders in existing and new targeted industry sector initiatives.

In April 2023, the subject matter experts at Onward Eugene, Matt Sayre, Nicole Desch and Caitlin Vargas established a new entity: Collaborative Economic Development Oregon (Collaborative EDO). Collaborative EDO, a 501(c)3 nonprofit organization, is dedicated to “Lead(ing) inclusive regional economic development initiatives and programs primarily in Lane County through targeted business recruitment, entrepreneurial support, workforce development, business expansion, regional marketing, strategic innovative projects and the formation of effective public/private partnerships.”

Based on this commitment and the team of subject matter experts, LWP contracted with Collaborative Economic Development Oregon until June 30, 2023 for the same Business Services that were in the previous Onward Eugene Business Services Contract.

Under this partnership, Collaborative EDO actively engages with key industries vital to the local economy, implementing proven programs and initiatives to accelerate the growth of high wage jobs. The organization collaborates closely with community stakeholders, both in existing and new targeted industry sector initiatives.

Key strategic goals for this partnership:

- Identify and support sector strategists and leads;
- Activate cross-sector collaboration opportunities;
- Host an Annual State of the Industry Summit;
- Establish measurements of success;
- Dive into new practices and strategies that have not been launched or developed;
- Be a catalyst for systemic change and elevating the importance of embedding DEI practices in our workforce system.

This investment in Sector Strategies strengthens Lane County’s workforce and economic development efforts significantly, with a focus on talent development, high wage job creation, business competitiveness, and industry-specific training that meet the demands of the region’s growth industries.

The below table highlights the combined number of Industry Engagements from July 1, 2022 through June 30, 2023:

Targeted Sectors	# of Businesses Engaged
Technology	261
Bioscience	210
Food and Beverage Manufacturing	107
Childcare	101
Transportation	57
Construction-Aggregate	35
Creatives	35
Wood Products	4
TOTAL	810

Learn more about Lane Workforce Partnership's *Lane County Sector Strategy Team* by visiting our [website](#). There, you can learn about ongoing efforts to connect industry partners, regional collaborations, and the Next Generation Sector Partnership model. Stay in the loop with the latest updates, events, and career opportunities, by following Lane Workforce Partnership on [LinkedIn](#), [Twitter](#), [Facebook](#), and [Instagram](#) or by subscribing to our monthly [newsletter](#). By connecting to Lane Workforce Partnership, you can join the conversation, learn about new career opportunities, and support the mission of meeting workforce needs of employers and individuals through partnerships and innovation.

Engage Relevant Agencies and Programs

LWP, as the Local Workforce Development Board, has a long history of working with business leaders to advance and strengthen workforce development in our community.

- The [Lane County Community Collaborative](#) is a group of economic and workforce development stakeholders from across Lane County that come together with the goal to better align efforts and resources to effectively meet the needs of our communities and have a positive ripple effect across our region. These monthly meetings are designed to foster rich conversation, relationship building, and collaboration.
- The [Lane County Latino a/x Leaders Work Group](#) convened for the first time in June of 2020, in partnership with The Oregon Community Foundation, OCF's Latino Partnership Program, Palo Alto Software, and Lane Workforce Partnership. Each gathering brings together Latino a/x leaders from across the county that work in a variety of sectors and have an assortment of influence. Meetings are structured to inspire and facilitate personal connections and help mobilize community-driven solutions. This initiative is co-facilitated by Dr. José Meléndez, Assistant Professor of Planning for Engaging Diverse Communities at the University of Oregon's School of Planning, Public Policy, and Management. Lane Workforce Partnership is providing additional support for a Latino Professional Leadership Institute.
- The [Institute for Networked Communities \(INC\)](#) has launched the Next Generation Sector Partnerships initiative, which has been closely working with our region for several years to develop and curate best practices and tools for sector partnerships across the county. As a result of this involvement, Lane Workforce Partnership is sponsoring registrations for Next Generation Sector Partnerships 101 Workshop.