

SKILLSOURCE REGIONAL WORKFORCE BOARD

Meeting Agenda

Tuesday, June 25, 2024 - 5:30 p.m.

Via ZOOM

Join Zoom Meeting

<https://skillsource.zoom.us/j/82957958102>

Meeting ID: 829 5795 8102

Passcode: 954765

Phone in: 1-253-215-8782

1. Call to Order – Zach Williams, Chair
2. March 15, 2025 Board Meeting Minutes ACTION
3. Director's Report - Lisa Romine INFO

Committee Reports & Action Items

4. **Funds Transfer Request (2024-25)**
-- Motion to Approve Recommended ACTION
5. **Okanogan Committee Meeting Report**
-- Motion to Approve 24-25 Service Delivery Budget Recommended ACTION
6. **Grant/Adams Committee Meeting Report**
-- Motion to Approve 24-25 Service Delivery Budget Recommended ACTION
7. **Chelan/Douglas Committee Meeting Report**
-- Motion to Approve 24-25 Service Delivery Budget Recommended ACTION
8. **Executive Committee Meeting Report**
-- Motion to Approve 24-25 Executive Budget Recommended ACTION
9. **Policy Revisions**
-- Motion to Approve Recommended ACTION

New Business

10. **Work-based Training Opportunities** INFO
11. **Media, Communications & Business Engagement Report** INFO

Enclosures

Meeting Schedule
Membership Roster
Success Story Compilation
Administrative Expenditures 3rd Quarter

Mission Statement

SkillSource builds workforce skills with business and one-stop partners to increase economic prosperity throughout North Central Washington and the Columbia Basin.

SkillSource Regional Workforce Board
Meeting Minutes
March 15, 2024
Confluence Technology Center, Wenatchee

Zach Williams, Board Chair, called the meeting to order at 4:35 pm. Lisa led introductions and oriented the board and attendees to the meeting agenda.

November 28, 2023 Board Meeting Minutes

Sara Thompson Tweedy made a motion, and Tom Legel seconded to approve the minutes for the November 28, 2023 Board Meeting. Motion passed.

Director's Report

Lisa summarized the director's report. She briefly recapped the trip to Olympia last month where SkillSource staff met with legislators to advocate for SHB 2230 which codifies Economic Security for All into law. She presaged the discussion about WorkSource Policy 1015 which has implications for direct delivery of services. She briefly summarized service delivery outcomes versus performance targets, and described the trip that she, Susan, and two board members will take to Washington, DC next week to attend NAWB. She introduced Kelli Martinelli and the new board newsletter. She summarized events over the past four months, including the AJAC apprentice signing night, the Othello hiring event, and the recent Grant/Adams Workforce Collaboration Summit. She invited the board members to the learning center graduations in June happening in Wenatchee, Othello and Omak. The board packet also includes short summaries of tonight's awardees.

Committee Reports:

Lisa recapped the committee meetings, which all had similar agendas. In each area, the staff gave an overview of the quarter's performance and an update on the regional plan. In Omak and Moses Lake, the One-Stop Operator gave their annual report; in Wenatchee, Susan reported on the Open Doors program. Each committee also recommended approval of the funds transfer and discussed WorkSource Policy 1015. Roni pointed out that the housing summit will be on March 25, not April 25.

Funds Transfer Request

Lisa recapped the request to transfer \$260,000 from Dislocated Worker to Adult. This moves funds to where they are needed.

Tom Legel made a motion, and Irasema Ortiz-Elizalde seconded to approve the transfer of \$260,000 from Dislocated Worker to Adult. Motion passed.

Direct Delivery Request

Lisa explained that since the inception of the Workforce Innovation and Opportunity Act, the SkillSource board and CLEO has requested permission to provide career services to Adults and Dislocated Workers and also deliver youth services. The board, staff, and the Forum of County Commissioners all advocated for adherence to federal regulations that permit direct delivery of youth services without competitive procurement and career services for Adults and Dislocated workers with agreement of the Governor. However, the State Board is currently on course to maintain the more restrictive nature of their previous policy. Lisa outlined the board's ongoing

rationale for direct delivery of services – in short, better performance and outcomes with more efficient use of funds. Lisa asked the board if they were still in favor of direct delivery, to approve this request. Zach and Tom earlier this year rated and selected an independent procurement manager in a failed competition, and this manager is available to run procurement until June, if needed. Sara asked what next steps could be taken; Lisa responded that the news of the intent to maintain policy is very fresh and she is still unsure; she is frustrated by the stated intent to remove administrative barriers from local boards, only to have burdens emplaced through policy. There are no entities who have identified themselves as potential service providers, and SkillSource continues to provide excellent service and performance. Roni suggested further involvement from the board to advocate for these types of actions whenever possible; Lisa appreciates the support of the board. Zach thanked Lisa for her efforts and passion in pursuing this policy.

Roni Holder-Diefenbach made a motion, and Sara Thompson Tweedy seconded to approve the finalization and submittal of the proposed request for direct delivery for Adult, Dislocated Worker and Youth services. Motion passed.

Regional Strategic Plan 2024-2028 (Presentation)

The board staff presented an executive summary of the draft regional strategic plan, which is currently available for public comment on the SkillSource website. The board was oriented to the structure of the plan and excerpts from the regional analysis. Aaron and Joe discussed the shifting proportions of highly skilled occupations and agricultural occupations, age demographics, the contract between the federal poverty level and other measures of poverty, and the relationship between English proficiency and labor market participation. Joe described the two major sector strategies (technology occupations and the healthcare industry) and the staff's reasoning for selecting them. Lisa concluded with a description of the plan's sections on services and performance accountability, as well as the stated strategic goals and objectives. The board thanked the staff for their work on the plan.

Tom Legel moved and Sara Thompson Tweedy to approve the draft regional plan as presented for submittal to the State Board.

The meeting was adjourned at 5:49 pm.

In Attendance:

Ryan Beebout
Faimous Harrison
Tad Hildebrand
Julie Helligso
Roni Holder-Diefenbach
Ken Johnson
Tom Legel
Nate Mack
Irasema Ortiz-Elizalde
Anthony Popelier
Michelle Price
Sara Thompson Tweedy
Zach Williams
Todd Wurl

Not in Attendance:

Randy Curry
Crystal Gage
Augustine Gallegos
Annette Herup
Brant Mayo
Kyle Niehenke
Pablo Villarreal

Staff in Attendance:

Lisa Romine
Susan Adams
Laura Leavitt
Aaron Parrott
Joe Hauth

Guests:

Susan Hauth

County Commissioners:

Chris Branch
Danny Stone

1. Current Significant Issues

a) WIOA Reauthorization: A Stronger Workforce for America (ASWA)

- On Wednesday, June 12, the Senate Health, Education, Labor, and Pensions (HELP) Committee held a hearing on Capitol Hill regarding the reauthorization of the Workforce Innovation and Opportunity Act (WIOA). **Some key takeaways from the National Association of Workforce Board (NAWB):**

1. Senators are eager to reauthorize—and amend--WIOA.

While no comprehensive WIOA bill has yet been unveiled in the Senate, several "placeholder" bills have been introduced, including an increase in the percentage of funds available to Governors for statewide youth workforce investment activities, changes to the law's performance accountability system, and strengthening reporting requirements, which could signal that these provisions are being considered for inclusion in a forthcoming Senate bill. **Takeaway:** workforce development boards need to effectively tell their story to lawmakers.

2. Will there be a training mandate? And if so, how will it be structured and defined?

Ranking member Cassidy argued that a greater share of WIOA funding should be going to training. He noted that there are eight million job openings, low labor force participation rates across the country, and only 200,000 individuals completing training each year. **Takeaway:** workforce development boards need to demonstrate and quantify their impact, including how and in what ways local workforce development boards help meet the unique needs of the communities that they serve.

3. Wrap-around services are essential.

Senators heard loud and clear the need for wrap-around and supportive services, including transportation, childcare, uniforms, and the need to address issues such as mental health, trauma, substance abuse, and homelessness. "Getting the job" is not nearly as important as "keeping the job," according to one witness. A recent CJC report showed that six months is not enough time to seamlessly transition into the workforce after experiencing trauma such as homelessness.

4. WIOA is significantly underfunded.

The Jobs coalition (CJC), testified that WIOA funding is not commensurate with need. Indeed, NAWB has called for at least a 5% increase, and we must, collectively as a network, call for increased funding, enhanced flexibility, and rigorous accountability. **Takeaway:** How well do we calculate and communicate the needs in our communities? What specifically would your Workforce Development Board be able to do if WIOA funding increased?

b) Local Strategic Plan Approval & Direct Delivery Update:

- The State Workforce Board will act on all 12 Local Board Strategic Plans at their meeting on June 20th. I anticipate the North Central Plan to be approved and the Board re-certified along with a one-year extension to our direct delivery approval for WIOA formula grants through June 30, 2025. This will allow the WTB time to finalize the complex procurement policy 1015 currently in draft.

2. Compliance Update

a) Program Year 2023 State monitoring results

We received the draft monitoring report for Program Year (PY)23. The report indicates, no findings, unresolved questioned costs or disallowed costs.

b) Equal Opportunity & ADA Compliance Monitoring

The State completed their full ADA facility compliance monitoring at WorkSource Okanogan. They had suggested modifications throughout the building and parking lot and some other minor adjustments. A final report will be received in order for ESD in Okanogan to address any necessary modifications.

c) 2024 State Monitoring Scheduled:

- State monitor team will be onsite November 4-8 to monitor programmatic and fiscal compliance for program year 2024.

3. Progress on Goals/Strategic Plan Implementation

This quarter's focus has been dedicated to drafting the new four-year strategic plan and refreshing priorities, goals and objectives. Future reports will return to highlighting specific examples.

Goal ONE: INDUSTRY	Goal TWO: YOUTH	Goal THREE: SKILLS & CREDENTIALS	Goal FOUR: SYSTEM & DATA
<p>North Central workforce system proactively engages companies & economic development to develop strategic partnerships for increased growth, competitiveness and workforce success.</p> <p>Objective 1: Identify emerging trends to build and expand career pathways for critical industries to include apprenticeship.</p> <p>Objective 2: Coordinate and align business services and outreach.</p> <p>Objective 3: Upskill and reskill working learners.</p> <p>Objective 4: Promote skilled trades development.</p> <p>Objective 5: Create a Regional Quality Jobs Framework and promote awareness to partners, businesses and career seekers.</p>	<p>North Central workforce system helps older teens and young adults understand the qualifications necessary to succeed in the workplace and how to make informed career pathway choices.</p> <p>Objective 1: High school graduates make informed career pathway choices.</p> <p>Objective 2: Improve access to activities leading to accelerated credential attainment for individually meaningful careers.</p> <p>Objective 3: Young people explore careers & workplace experiences through career connected learning and work-based learning.</p> <p>Objective 4: Increase youth awareness of workforce services and programs.</p> <p>Objective 5: Improve retention & graduation.</p>	<p>North Central workforce system equips and supports all career seekers throughout the region to obtain in-demand, industry-recognized skills and credentials for competitive occupations.</p> <p>Objective 1: Create accessible, in-demand pathways and credentials.</p> <p>Objective 2: Prepare career seekers for meaningful career employment.</p> <p>Objective 3: Advance the acknowledgment and acceptance of skills and lived experience for hiring, education, training & career development.</p>	<p>North Central workforce system uses data for continuous improvement and increased customer knowledge & access of One-Stop programs.</p> <p>Objective 1: Enhance collaboration and customer experience through shared operational data, partner services and outcomes.</p> <p>Objective 2: Streamline one-stop service access and service delivery through enhanced technology and processes.</p> <p>Objective 3: Improve community awareness of the One-Stop system through outreach campaigns and coordinated partner outreach plans.</p>

4. Organizational Performance Dashboard

Sub area performance for Q3 was reviewed at the sub-area committee meetings. See committee packets. Also included at the end of this report is a letter from our grantor agency ESD regarding SkillSource performance highlights through April, 2024.

5. Items of Information

- **Board Retreat Planning:** We are targeting March 2025 for a board planning retreat. This will be similar to the retreat held at Sage Cliffe Resort in 2023. More details to come.
- **National Association of Workforce Boards:** Annette, Sara, Todd, Lisa & Susan attended the National Association of Workforce Board Forum in Washington DC, March 22-26. In addition to attending sessions, both Sara and Annette made the Hill climb to meet with Senator Cantwell and Senator Murray staff. These are great opportunities for locals to show up and help educate law makers about the needs of our communities and workforce. It really does matter and really can make a difference. Thank you, Annette, Sara and Todd for making the trip. Next year NAWB will be held March 29- April 2 in WA DC. Consider attending! We typically take 3 board members.



Business Outreach & Engagement Report

| April 2024 – June 2024 | Susan Adams

Business Outreach & Engagement Report

The SkillSource Regional Workforce Board continues to expand **business outreach and services** for all programs, but with a current focus on the Community Reinvestment Funds and the State Economic Security for All Grant. Both grants prioritize serving Black, Indigenous, and Latino businesses and career seekers. SkillSource sponsored three **cultural events** targeted at these communities in each sub area: La Terraza de Main Street (Wenatchee), Cinco de Mayo (Othello), and the Sunflower Festival (near Omak). Staff presented to and connected with over 60 businesses and 100 career seekers at these events, providing an opportunity to share **incumbent worker training (IWT), on the job training, internships, and small business grants** opportunities. Since receiving the CRF investment in January, staff have connected with 82 priority businesses. Seventy-five employees at Stemilt earned forklift certifications this Spring utilizing CRF funds, with 95% of the employees representing the priority population. Currently staff are working with Latino-owned businesses to develop several IWT's and work experiences.

SkillSource and partners in our three sub areas served over 300 businesses, 500 career seekers, and 400 partner staff through outreach and hosting Spring events. **Hiring events** served businesses and job seekers in Othello, Moses Lake, Wenatchee, and Omak and Workforce **Collaboration Summits** convened partners in Omak, Moses Lake, and Wenatchee. Additionally, SRWB prioritizes training staff to gain current labor market and workforce strategies to provide robust services. Ten SkillSource and WorkSource Okanogan staff members attended the **National Association of Workforce Development Professionals (NAWDP) Conference** in May with learning tracks including Improving Access to Good Jobs, Artificial Intelligence and Technology, Expanding Opportunities for Vulnerable Workers and Communities, Leadership in Workforce Development, Utilizing Data and Labor Market Information, and Developing Strategic Partnerships.

The start of our fiscal year will be an opportunity to build on these diverse efforts. In July, our **new Business Engagement Specialist** will join our team to lead the CRF business service efforts. She is a former SkillSource employee, small business owner, and co-chair of the Hispanic Business Council. With the efforts to date, coupled with the launch of our Salesforce CRM, "by and for" contracts with the Hispanic Business Council and Cafe, and new team members, SkillSource is positioned well to impact our businesses and communities with these investments.



STATE OF WASHINGTON
EMPLOYMENT SECURITY DEPARTMENT

PO Box 9046 • Olympia WA 98507-9046

April 18th, 2024

Lisa Romine
Chief Executive Officer
SkillSource
Via e-mail

Dear Lisa,

It is important to take a moment to recognize your positive performance on the outcomes shown below from your WIOA Title I grants and discretionary contracts. Please feel free to share this with your board and entire team, as you see fit, in appreciation of the hard work and dedication they put into finding solutions and support for the communities served by your LWDB.

SkillSource quarter ending December 31st, 2023 (June 30th, 2023 for employment outcomes):

Outcome	Target	Actual
WIOA Adult Enrollments	110	162
WIOA Adult Employment Placements	66	83
WIOA Youth Enrollments	84	157
WIOA Youth Employment Placements	44	52
Federal EcSA Enrollments	42	59
Federal EcSA Employments Above Self-Sufficiency Wage	30	27
State EcSA Enrollments	36	62
State EcSA Employments Above Self-Sufficiency Wage	8	13

You exceeded your enrollment targets for the quarter by 86%, more than double the rate at which you exceeded performance last year. This marks a continuing trend year-over-year for the middle of the program year, a time which is traditionally difficult for the Adult program across the state due to the holidays. Additionally, your credential rate continues to be excellent, and your entered employment rate for Grant/Adams and Chelan/Douglas are both 94%, a mark of your excellent work in preparing your clients to enter the job market and achieve their goals for employment. Additionally, you continue to run an exemplary EcSA program, providing best practices that will help the rest of the state to quickly implement the Community Reinvestment Fund incentives program. We see your exemplary work, and we want you to know that we appreciate it, every day. If we could offer additional technical service in any area of grant administration, training, policy guidance, or others, please just let us know. Our goal is to support your local success.

We are always looking for successful practices to share with the rest of the workforce development system. If you would like to share any tools or practices with your peers across the state, please send them to ESDGPWorkforceInitiatives@esd.wa.gov. Also, let us know in that message if you would be willing to present during the next quarterly peer-to-peer teleconference. By sharing your successes, you can help the entire state continue to pursue and achieve excellence.

If you would like more information, please let me know. Congratulations again on your success, and thank you for serving Washington's employers, workers, jobseekers, and youth.

Sincerely,

Tim Probst
Grants Director
Washington State Employment Security Department

SkillSource Regional Workforce Board (WDA 8)

Request for Funds Transfer

June 2024

Note: This item was recommended for full Board approval at each sub-area Committee meeting on June 10, 11 & 12, 2024.

1) The Transfer Fund Source: Dislocated Worker formula to Adult formula

2) The dollar amount of the transfer request, including the percentage share of the base allocation represented by that dollar amount:

The amount requested is broken down as follows:

Program/Fiscal Year	Amount	% Allocation
PY24/FY25	\$284,500	30%
Total	\$284,500	30%

3) The reason(s) for the transfer: SkillSource requests a transfer of \$284,500 from Dislocated Worker formula to Adult formula for these reasons:

- 1) In Program Year (PY) 23, SkillSource requested a \$260,000 (30%) transfer from Dislocated Worker to Adult. The PY22 transfer request totaled \$141,000 (17%) and the PY21 transfer was \$300,000 (30%); the underlying issues which triggered those requests have not changed. Numbers of dislocated workers seeking retraining through the local one stop system remain low. In contrast, the relatively higher number of Adults seeking career and training services continues to grow. Additionally, Federal and State EcSA funding, as well as the Community Reinvestment Fund, continue to provide the local area increased training capacity for this group as well as more flexible eligibility criteria. These funds have been utilized along with formula funds to serve this group of individuals.
- 2) Performing this transfer at the beginning of the year allows SkillSource to set accurate performance targets for enrollment and services for the three subareas that do not have to be adjusted mid-year. In the unlikely event that Dislocated Worker service need in the region surges, SkillSource can transfer back funds or request increased Rapid Response funds.
- 3) Adult program funds will support the case management and training needs of the large number of Federal and State EcSA participants enrolling for services, and to assist with case management of the Community Reinvestment Fund incentives for those participants.
- 4) The unobligated \$137K of QUEST NDWG funds being carried into PY24 will assist in supporting Dislocated Workers through the end of December.

- 5) This transfer will enable continuing robust services for Adults throughout the WDA's five counties. As the labor market continues to open up, the Area is seeing more Adults seeking services than Dislocated Workers (199 Adults vs. 80 DWs through 4/30/24). The business environment is relatively stable in North Central, meaning that there are few large layoffs or closures which would require Dislocated Worker services. These trends have preserved in North Central for many years.
- 6) This transfer will also assure that Adult PY24 base quarter funds are sufficient to continue Adult outreach, intake and new enrollment throughout the summer.

4) Approval from the local board requesting the transfer: The SkillSource Board will act on this request at their June 28, 2024 board meeting.

5) Change in Planned Participants

- a) *Proposed services and number of participants originally planned to be served by the base allocation compared to the services and number of participants planned to be served after funds are transferred:*

This request will accompany the grant package to Employment Security and the revised amounts will be used to determine proposed PY24-25 enrollment and service goals.

- b) *Justification that the transfer of funds will not adversely impact the provision of services to participants and the necessary services and client-planned activities will be maintained in the program from which funds are transferred:*

Currently, we are aware of no potential or actual permanent closures that will require significant dislocated worker funds. Formula funds post-transfer will be sufficient to match PY23 Dislocated Worker activity. Also, adequate Local Formula funds will be carried over to meet dislocations anticipated through September 30, 2024. PY23/FY24 Dislocated Worker formula funds will also be available to serve laid-off workers next fiscal year. The Area received \$731,000 of QUEST funding from the State to serve dislocated workers, \$137,000 of which remains carried over into PY24. With all of these factors, this transfer is justified and will not adversely impact our ability to serve dislocated workers over the program year.

Okanogan Committee Meeting
June 10, 2024
WorkSource Okanogan, Omak, WA

5

Present: Roni Holder-Diefenbach, Laura Hamilton (DVR, for Pablo Villareal)

Staff: Lisa Romine, Aaron Parrott, Susan Adams, Kelli Martinelli, Juan Martinez, Lisa Bauer

Introduction and Updates

Lisa thanked the members present for attending the meeting, led introductions and summarized the agenda. A revised budget handout was distributed to the members present.

Workforce Investment Performance Report and Corrective Action Update

Aaron summarized this quarter's success story. This quarter nearly 80 workforce professionals and partner staff assembled for the Okanogan Workforce Collaboration Summit on April 9. The summit featured keynote speakers Tamar Jackson and Kelly Brickhouse from Workforce Central.

Aaron summarized Title I service delivery performance through March 31st. WorkSource Okanogan has served 158 individuals against a goal of 311, or just over 50%; Aaron noted that that number has grown to 198 individuals as of the end of May. WSOK has enrolled 43 adults against a goal of 71 and 20 dislocated workers against a goal of 35. These goals were revised following the funds transfer from DW to adult last quarter. 29 youth have been enrolled against a goal of 30. Outcomes to employment and credential attainment are all at or above target.

Ten participants are enrolled at WVC-Omak this year compared to seven last year. Overall, WSOK is 52% expended and 74% obligated for budgeted funds as of March 31st; Lisa explained that the Okanogan contract will be renewed on June 1st.

Lisa called the group's attention to the Sunflower Festival held at Paschal Sherman Indian School, sponsored in part by SkillSource through the Community Reinvestment Fund in order to promote business services and raise awareness of the new opportunities with these funds.

Susan summarized the status of the corrective action which was renewed in a memorandum on April 26. In February three staff members departed which had the potential to derail the improvement made over the past several quarters. Regional Director, Todd Wurl, responded on behalf of Employment Security; Susan reported that the action steps detailed in his response was satisfactory and Lisa added that improvement is already evident. Juan reported that one new staff member started today, another starts next week and a third starts July 1. In addition, the part-time Pre-ETS staff member was transitioned to a full-time youth counselor position. In addition, the learning center will transition to Open Doors with a start date of August 1.

Funds Transfer Request

Susan explained that normally the staff recommends a funds transfer from Dislocated Worker to Adult about 2/3 of the way through the year. This year, staff is recommending this transfer be conducted at the beginning of the year to streamline planning and have set goals at the onset. There is an ongoing trend of much less demand for dislocated worker services through the five counties, and there are sufficient funds under the QUEST DWG to assist with those services.

As sole board member present, Roni Holder-Diefenbach recommended approval of the described funds transfer to the full board.

2024-2025 Proposed Budget

Lisa gave an overview of the 2024-25 allocations. In general, funding for WIOA formula funds increased 9% for the five-county area. Okanogan received a 36% increase, largely comprising added incentive funds from Community Reinvestment. Susan summarized where budget lines have changed, including a 49% increase in personnel, a 31% decrease in basic education, a 21% increase in computer basic skills, 22% more work based learning, and 551% more incentive funds. ESD indirect costs have increased to 38%. Total number served target will increase 6% from this year. Susan directed the group's attention to Page 4 which depicts the 11 different funding streams which comprise the Okanogan budget, as well as goals for enrollments, activities and outcomes. Okanogan will receive Federal and State EcSA funds starting this year. Roni wondered if this level of funding increase is sustainable. Lisa replied that discretionary funding has eclipsed formula funding, and that the LWDB directors' advocacy for the discretionary programs is resulting in continued legislative support for these funds into the future.

As sole board member present, Roni Holder-Diefenbach recommended approval of the 2024-2025 Okanogan budget to the full board. The motion carried.

Policy Revisions/Updates

Lisa explained that in accordance with WorkSource System Policy 1028, changes to local directives are being presented to the Board for information and approval. Aaron summarized the changes:

- Local Directive 17-162 (Incumbent Worker Training) will be revised to include a third tier of employer match for small businesses.
- Local Directive 22-179 (State EcSA Incentives) will be revised to add Community Reinvestment Fund incentives and adds activities eligible for incentives.
- Local Directive 22-180 (Economic Security for All) will be revised to align with state policy which excludes training costs from the \$5000 cap for participants from households at or above 200% of FPL.

As sole board member present, Roni Holder-Diefenbach recommended approval of the proposed revisions to the local directives to the full board. The motion carried.

Community Reinvestment Updates

Lisa explained that the Community Reinvestment Fund will continue into the 2024-25 program year, and will include several new initiatives, including a small business grant program to help Black, Indigenous, and Latino-owned or operated businesses; contracting with community-based organizations for outreach and referrals; and matched savings accounts which will be used along with performance incentives to financially benefit participants in training and education. Roni asked how much information the applicants for the small business grants would be asked to provide, and advised careful and transparent administration of the grants program.

The meeting adjourned at 1:09 PM. The full board meeting will be held on Tuesday, June 25th at 5:30 PM via Zoom.

OKANOGAN 24-25 BUDGET

Overview of the Budget

Washington's formula share of PY24 Adult, Dislocated and Youth funds increased by 12%. North Central's share of formula funds increased from 5.6% to 6.1%, an average of 9%. This increase in new formula revenue is added to carry-in revenues and \$2.8M of new Economic Security for All (EcSA) funds for a total of \$9.8M available for PY24. This represents an increase of almost \$2.5M. A 30% transfer of PY24 Dislocated Worker funds to Adult is planned in order to have sufficient training slots available to incentivize under the State EcSA funds. Okanogan's share of all funds, formula and discretionary are listed below.

FUNDING:

- Adult 357,210 (4,357 decrease)
- Dislocated Worker 151,689 (112,869 decrease)
- State Economic Security 112,046 (82,092 increase)
- Community Reinvestment 399,362 (312,408 increase)
- Federal Economic Security 50,972 (new)
- Youth 256,443 (84,437 increase)
- Pre-Employment Transition 70,965 (2,102 decrease)
- State Education 171,171 (7,878 increase)

TOTAL BUDGETED EXPENSES \$1,569,858 (418,459 increase 36%)

Major Budget Categories

HUMAN RESOURCES (Salaries & Benefits) \$526,380 (\$172,691 increase 49%)

Four (3.7 FTE) trainers are budgeted to conduct outreach, determine eligibility, assess skills and interests, guide career plans, teach workshops, serve business, facilitate training, placement, and follow-up 176 enrolled participants for an average ratio of 48:1. This compares to 3 trainers this year and a 56:1 ratio. The extra staff effort involved with the Economic Security for All self sufficiency calculator, incentives, and managing the matched savings accounts results in a lower staff to participant ratio. A fulltime manager is proposed compared to current year where the manager was budgeted to carry a partial caseload. Total served (including career information) increases from 311 this year to 342 next year. Staff are budgeted at their current rate. Five percent (5%) is budgeted for cost of living and step increases. The fringe benefit rate remains the same at 40%.

ONE-STOP OPERATOR - \$30,000 (no change)

A One-Stop Operator has been contracted to serve the Okanogan Center. OIC was selected as fiscal agent for a Consortium Operator. The consortium is comprised of management level personnel from DVR, SkillSource, and Employment Security.

PHYSICAL RESOURCES – (Supplies, Facilities, Communication, Equipment, and Miscellaneous) \$108,815 (\$2,661 decrease 2%)

Physical resources are budgeted based on a cost per Employment Security staff FTE relative to total staff in the Center. Training related FTE increased from 4.5 to 5 and is budgeted at the Employment Security planning rate of \$17,858 per FTE compared to \$21,843 per FTE in the current year. Career Connect events & supplies are budgeted at \$9,000. Finally, assessment fees, supplies, and staff training are budgeted at \$9,930.

OKANOGAN BUDGET SUMMARY
PROGRAM YEAR 24-25

	PY 23 APPROVED Mod1	% OF BUDGET	PY 24 PROPOSED	% OF BUDGET	INCREASE (DECREASE)	
PERSONNEL (salaries & benefits)	353,689	28%	526,380	34%	172,691	49%
ONESTOP OPERATOR	30,000	3%	30,000	2%	-	0%
PHYSICAL RESOURCES (supplies, equipment, facilities etc.)	111,476	11%	108,815	7%	(2,661)	-2%
BASIC EDUCATION	174,978	12%	120,649	8%	(54,329)	-31%
COMPUTER BASICS	40,821	4%	49,485	3%	8,664	21%
WORK BASED LEARNING	133,932	16%	163,688	10%	29,756	22%
VOCATIONAL EDUCATION	131,200	14%	104,500	7%	(26,700)	-20%
INCENTIVES	46,900	1%	305,400	19%	258,500	551%
SUPPORT	29,683	4%	25,075	2%	(4,608)	-16%
INDIRECT (28.43%)	98,720	7%	135,866	9%	37,146	38%
TOTAL TRAINING	1,151,399	100%	1,569,858	100%	418,460	36%
<u>ACTIVITY GOALS:</u>						
BASIC EDUCATION						
ADULT and DISLOCATED WORKER	3		6		3	
YOUTH (federal enrolled only)	10		10		-	
STATE EDUCATION	50		50		-	
	63		66		3	5%
WORK BASED LEARNING						
INCUMBENT WORKER TRAINING	39		40		1	
ON-THE-JOB TRAINING	19		10		(9)	
WORK EXPERIENCE/INTERNSHIP	21		30		9	
	79		80		1	1%
VOCATIONAL EDUCATION						
VOCATIONAL TECHNICAL EDUCATION	36		31		(5)	
COMPUTER BASICS	50		50		-	
	86		81		(5)	-6%
<u>PARTICIPANT GOALS⁽¹⁾:</u>						
YOUTH	30		36		6	
ADULT & ECONOMIC SECURITY FOR ALL (State)	71		59		(12)	
DISLOCATED	48		24		(24)	
ECONOMIC SECURITY FOR ALL FEDERAL	-		6		6	
TRAINING	15		22		7	
PREEMPLOYMENT TRANSITION	30		30		-	
	194		176		(18)	-9%
<u>OTHER PARTICIPANT GOALS⁽¹⁾:</u>						
STATE EDUCATION	50		50		-	
CAREER INFORMATION & ASSESSMENT ONLY	82		119		37	
	132		169		37	28%
TOTAL NUMBER SERVED	326		345		19	6%

1 *PARTICIPANT GOALS + OTHER GOALS = TOTAL SERVED

OKANOGAN COUNTY
PY 24-25 BUDGET SUMMARY BY FUND TYPE

6/7/2024 15:52	ADULT	DISLOCATED WORKER	STATE ECONOMIC SECURITY <200%	STATE ECONOMIC SECURITY >200%	STATE ECONOMIC SECURITY BUSINESS NAVIGATOR	COMMUNITY REINVESTMENT BUSINESS SERVICES & TRAINING	COMMUNITY REINVESTMENT INCENTIVES & INDIVIDUAL DEVELOPMENT ACCOUNTS	FEDERAL ECONOMIC SECURITY	YOUTH	PREEMPLOYMENT TRANSITION	STATE EDUCATION	PY 24 TOTAL	PY23	CHANGE	% CHANGE
SALARIES	93,245	37,369	16,402	5,114	13,024	17,848	28,526	13,024	68,499	23,344	28,004	344,398	243,960	100,438	41%
BENEFITS	37,298	14,947	6,561	2,045	5,210	7,139	11,410	5,210	27,400	9,337	11,201	137,759	97,584	40,175	41%
ALLOCATED SALARIES/BENEFITS	11,949	4,788	2,109	659	1,669	2,284	3,661	1,669	8,786	3,134	3,514	44,223	12,145	32,078	264%
ONESTOP OPERATOR	10,000	10,000			-	-			10,000			30,000	30,000	-	0%
TRAVEL	914	366	161	50	128	175	280	128	672	240	269	3,382	3,220	162	5%
MISCELLANEOUS	12,380	3,759	1,655	517	1,310	1,792	2,873	1,310	6,896	2,460	2,762	37,716	32,496	5,221	16%
SUPPLIES	1,038	416	183	57	145	198	318	145	9,763	272	305	12,843	14,437	(1,594)	-11%
EQUIPMENT	136	55	24	8	19	26	42	19	100	36	40	503	331	172	52%
FACILITIES	10,086	4,042	1,780	556	2,686	2,725	1,677	1,409	7,416	2,645	2,305	37,327	47,136	(9,809)	-21%
COMMUNICATIONS	3,252	1,303	574	179	454	622	996	454	2,391	853	956	12,034	9,187	2,847	31%
STAFF TRAINING	1,354	542	239	75	189	259	415	189	995	355	398	5,009	4,669	341	7%
ON-THE-JOB/ WORK EXP/INCUMB	9,000	27,000	-	-	-	33,660		-	74,760	19,269		163,688	133,932	29,756	22%
VOCATIONAL EDUCATION	62,500	21,000	-	-	-			21,000	-	-		104,500	131,200	(26,700)	-20%
BASIC EDUCATION	12,673	2,293			-				7,700	-	97,984	120,649	174,978	(54,329)	-31%
COMPUTER BASICS	42,557	6,928			-							49,485	40,821	8,664	21%
INCENTIVES/MATCHED SAVINGS	-	-	20,000	12,000	-	-	268,000		4,000	1,400		305,400	46,900	258,500	551%
SUPPORT	9,199	3,628	3,941	1,568	-	-		2,359	3,555	325	500	25,075	29,683	(4,608)	-16%
TOTAL SERVICE DELIVERY	317,579	138,435	53,629	22,829	24,835	66,728	318,197	46,917	232,934	63,669	148,240	1,433,992	1,052,678	381,313	36%
INDIRECT (28.43% of Salaries)	39,631	13,253	5,107	1,593	4,054	5,555	8,881	4,054	23,509	7,297	22,932	135,866	98,720	37,146	38%
GRAND TOTAL	357,210	151,689	58,736	24,421	28,889	72,284	327,078	50,971	256,443	70,965	171,171	1,569,858	1,151,399	418,459	36%
EXPENDITURE PROJECTIONS	357,210	151,689	58,736	24,421	28,889	72,284	327,078	50,972	256,443	70,965	171,171	1,569,858			
REMAINING TO BUDGET	0	(0)	0	(0)	(0)	0	0	0	0	(0)	(0)	0			

	ADULT	DISLOCATED							YOUTH	PREEMPLOYMENT TRANSITION	STATE EDUCATION				
PY 23 BUDGET INCLU INDIRECT	361,567	264,558	-	-	29,954	86,954		-	172,006	73,067	163,293	1,151,399	137,092	cost per staff fte	
(DECREASE) INCREASE	(4,357)	(112,869)	58,736	24,421	(1,065)	(14,670)	327,078	50,972	84,437	(2,102)	7,878	418,459			
	-1%	-43%			-4%	-17%			49%	-3%	5%	36%		increase(decrease) of budgeted expenditures %	

PY 24-25 GOAL PROJECTIONS															
PARTICIPANT GOALS	ADULT	DISLO	SEcSA<200%	SEcSA>200%	Biz Nav	CRBST	CRInc/MSA	FEcSA	YOUTH	PREEMP TRANS	STATE ED	345	326	19	6%
total participants	59	24	17	5		22	22	6	36	30	50	226	244	(18)	-7%
carryin	23	15	10						23	10		81	41	40	98%
new	36	9	7	5		22	22	6	13	20		139	140	(0)	0%
TRAINING ACTIVITY GOALS															
Incumbent Worker Training		24	-	-		16	-	-				40	39	1	
On-The-Job Trng /Work Experience	3	1	-	-		6	-	-	18	12		40	40	-	
Occupational Education	19	6	-	-		-	-	6	-	-		31	36	(5)	
Basic Education	5	1	-	-		-	-	-	23		50	63	63	-	
Computer Basics	43	7	-	-		-	-	-				50	50	-	
Work Readiness												30	16	14	
Total Activities	70	39	-	-		22	-	6	41	42	50	254	229	25	
OUTPUT GOALS															
Placements	26	11							14			51	66		
Cost Per Placement	\$13,111	\$13,018							\$17,553			\$14,304	\$11,683		
Credential	23	10							11			44	67		
Cost Per Credential	\$14,899	\$14,118							\$22,819			\$20,537	\$13,803		
OTHER PLANNING GOALS															
# service delivery staff fte	1.36	0.55	0.24	0.08	0.19	0.26	0.42	0.19	1.00	0.36		4.63	3.80	0.83	22%
# fte trainer	1.07	0.43	0.20	0.07	0.15	0.20	0.34	0.15	0.80	0.33	0.00	3.73	3.10	0.63	20%
# participants per trainer	55	55			-	110		40	45			47	56	(9)	-16%
# total staff (sd & instructional)	1.79	0.62	0.24	0.08	0.19	0.26	0.42	0.19	1.05	0.36	1.14	6.33	5.58	0.75	13%
participants less training activities	(11)	(15)			-	-		-	(5)	(12)					
proposed cost per participant	\$5,900	\$6,014	\$3,455	\$4,884	N/A	\$3,286	\$14,867	\$8,495	\$6,846	\$2,366	\$3,423	\$6,801	\$4,561	\$2,240	49%

* onestop operator is not included in cost per calc

**Grant/Adams Committee Meeting
June 11, 2024
WorkSource Central Basin, Moses Lake, WA**

Present: Ken Johnson, Annette Herup, Sara Thompson Tweedy, Brant Mayo, Irasema Ortiz-Elizalde, Tad Hildebrand

Staff: Lisa Romine, Susan Adams, Aaron Parrott, Kelli Martinelli, Emily Anderson, Alicia Wallace, Lora Wood (ESD), Laura Leavitt (via Zoom)

Introductions, Announcements & Updates

Lisa thanked the members present for attending the meeting, led introductions and summarized the agenda and action items for this quarter.

Workforce Investment Performance Report

Aaron summarized this quarter's success story. Darlene was the recipient of a donated vehicle after successfully completing an OJT with Armada Corp, rescuing her from a cycle of financial distress. Emily told the tale of how Darlene connected with SkillSource and Armada, and some of the challenges she and her family faced.

At the close of the third quarter of the program year, Moses Lake is more than 87% to their goal for total individuals served and has surpassed even the upward revised annual goal for Adult enrollments. Dislocated Worker enrollments are at 69% of the revised annual goal, following the funds transfer. Youth enrollments are at 143% of annual target. Discretionary EcSA and QUEST enrollments are also all above annual targets by end of Q3. Outcomes for all programs continue to be generally strong. Aaron also acknowledged the tremendous work that the Grant/Adams youth team has done in supporting DVR Pre-ETS this year.

Healthcare and office technical education at Big Bend continue to trail last year's enrollments by about 50%, and industrial/technical enrollments are down by two-thirds, partially accounted for by the lack of CDL cohort trainings. Fiscal expenditures are at 59% overall through Q3 with obligations forecasted at 80%.

Lisa thanked Big Bend Community College for hosting the Building the Future Energy Workforce event in April as well as the GC EDC for their Annual banquet. Both were great networking and learning events.

Funds Transfer Request

Susan explained that normally the staff recommends a funds transfer from Dislocated Worker to Adult about 2/3 of the way through the year; this year, it is recommended to the board that a 30% transfer be conducted at the beginning of the year. There is an ongoing trend of much less demand for dislocated worker services through the five counties, and there are funds under the QUEST DWG to assist with those services. This allows management to set accurate performance targets from the beginning of the program year. Susan explained that in the case of large unexpected layoffs, funds can be requested to cover those needs. Tad asked what funds are available to support the Moses lake School District layoffs. Susan responded that SkillSource is in close contact with NCESD through Michelle Price, and is prepared to assist classified staff if the district or those workers request services. Annette asked how the percentage was arrived at; Susan explained that there is great need for additional funding to deploy the several discretionary grants serving adults, so 30% was recommended because to request a larger funds transfer requires extraordinary measures for approval.

Sara Thompson Tweedy moved and Ken Johnson seconded to recommend approval of the described funds transfer to the full board. Motion carried.

2024-2025 Proposed Budget

Lisa gave a quick overview of the 2024-25 allocations. In general, funding for WIOA formula funds increased 12% for the state and 9% for the five-county area. This year, discretionary funding eclipsed federal formula funding, which will require funds braiding and increased administration. Grant/Adams will receive a 33% increase, over \$776,000; \$413,000 of that increase is incentives. Susan referred the group to page 3 of the budget proposal which details increases and decreases; in addition to the huge increase in incentives, personnel increases 25% (about 2.5 FTE), basic education increases 36%, computer skills instruction increases 60% (.3 FTE). Susan explained how increased effort in Othello drives some of the budget increases. Susan described changes in enrollment and activity goals resulting from the budget changes; with the exception of Federal EcSA enrollments, all those targets are increased for next year. Total served goal increases by 14 percent. On the next page Susan showed the committee how these enrollments and activities are supported by twelve different funding sources, and how those translate to performance targets. Lisa and Susan explained how each grant has increased or decreased for Grant/Adams this year, and how the activity targets reflect board priorities for work-based learning and vocational education. Ken asked if there is a possibility of resuming Open Doors in Moses Lake; Lisa explained that the space where the learning center used to be is rented out now, and while it is unlikely to happen, SkillSource would pursue it if the board so directed. Laura explained that Open Doors is fee-for-service and fiscally possible to resume.

Annette Herup moved and Sara Thompson Tweedy seconded to recommend approval of the 2024-2025 Grant/Adams budget to the full board. Motion carried.

Policy Revisions/Updates

Lisa explained that in accordance with WorkSource System Policy 1028, changes to local directives are being presented to the Board for information and approval. Lisa will discuss with Zach Williams the best way to expedite minor policy changes in the future. Aaron summarized the changes:

- Local Directive 17-162 (Incumbent Worker Training) will be revised to include a third tier of 10% employer match for small businesses.
- Local Directive 22-179 (State EcSA Incentives) will be revised to add Community Reinvestment Fund incentives and adds activities eligible for incentives.
- Local Directive 22-180 (Economic Security for All) will be revised to align with state policy which excludes training costs from the \$5000 cap for participants from households at or above 200% of FPL.

Annette asked what percentage of served businesses would benefit from the 10% employer match tier. Lisa and Emily said that the majority of businesses served with IWT have 50 employees or fewer; Emily gave an example of a dental office that has said they would not be able to participate at the 25% employer match level. Aaron added that large businesses often have training resources that smaller businesses do not, making them better prospects for incumbent worker training services.

Ken Johnson moved, and Brant Mayo seconded, to recommend approval of the proposed revisions to the local directives to the full board. The motion carried.

Community Reinvestment Updates

Lisa explained that the Community Reinvestment Fund will continue into the 2024-25 program year, and will include several new initiatives, including a small business grant program to help Black, Indigenous, and Latino-owned or operated businesses; contracting with community-based “By and For” organizations for outreach and referrals; and matched savings accounts which will be used along with performance incentives to financially benefit participants in training and education. Lisa said that this is all new territory and that state policy is still being developed, but this is very exciting work and is the next step in the success stories that have been shared over the last year. Tad asked if there are any priority industries; Lisa responded that the priority is on demographic populations. He also suggested involving the Small Business Council. Emily said she has been in touch with them as well as with OIC. Annette asked if the “priority”

was actually exclusionary; Lisa responded that the small business grants would be narrowly focused on Black, Indigenous and Latino owned; Susan explained further that incentives are prioritized but not exclusive to these populations as they were disproportionately impacted by the War on Drugs and Commerce has prioritized those populations most impacted.

Open Discussion and Updates

Ken Johnson reported the final sale of his business, where he is still working as a consultant. Brant reported work with utilities and current customers as usual. Sara invited the committee to the Big Bend graduation on Friday, with 350 students signed up to participate. She also announced the public announcement of the Bachelors in Behavioral Health in 2025, developed in partnership with WVC, and searches for two dean positions. She reported that two finalists pulled out of contention due to the upheaval in the Moses Lake School District; she's also seen increased interest in Running Start for the same reason. Grant County Animal Outreach received \$2 million in city and county funds for a new facility, and Sara is applying for more philanthropic funds. Irasema reported a new interim community service director at DSHS. Tad announced he is leaving Nash Consulting to start his own consulting business.

The meeting adjourned at 1:34 PM. The full board meeting will be held on Tuesday, June 25th at 5:30 PM via Zoom.

GRANT/ADAMS BUDGET SUMMARY
PROGRAM YEAR 24-25

	PY 23-24 M#1 APPROVED	% OF BUDGET	PY 24-25 PROPOSED	% OF BUDGET	INCREASE DECREASE)	
PROGRAM						
PERSONNEL (salaries & benefits)	916,738	40%	1,150,044	37%	233,306	25%
ONESTOP OPERATOR	40,000	0%	40,000	1%	0	0%
PHYSICAL RESOURCES (supplies, equipment, facilities etc.)	211,867	9%	223,819	7%	11,952	6%
BASIC EDUCATION	148,020	6%	202,013	7%	53,993	36%
COMPUTER BASIC SKILLS	72,001	3%	115,336	4%	43,335	60%
WORK BASED LEARNING	355,266	15%	367,690	12%	12,424	3%
VOCATIONAL EDUCATION	299,840	13%	324,858	10%	25,018	8%
INCENTIVES	191,000	8%	604,000	20%	413,000	216%
SUPPORT	84,402	4%	67,353	2%	(17,049)	-20%
TOTAL	2,319,135		3,095,113		775,978	33%

ACTIVITY GOALS:

BASIC EDUCATION

ADULT and DISLOCATED WORKER
YOUTH (FEDERAL ONLY)
STATE EDUCATION

-	-	-
40	40	-
50	50	-
90	-	90
-	-	-

0%

WORK BASED LEARNING

INCUMBENT WORKER TRAINING
ON-THE-JOB TRAINING
WORK EXPERIENCE/INTERNSHIP

60	63	3
35	39	4
63	80	17
158	182	24

15%

VOCATIONAL EDUCATION

VOCATIONAL TECHNICAL EDUCATION
COMPUTER BASIC SKILLS

89	96	7
80	80	-
169	176	7

4%

PARTICIPANT GOALS⁽¹⁾:

YOUTH
ADULT & ECONOMIC SECURITY FOR ALL (State)
DISLOCATED & DISCRETIONARY DW
ECONOMIC SECURITY FOR ALL (Federal)
COMMUNITY REINVESTMENT BUSINESS SERVICES & TRAINING
PRE-EMPLOYMENT TRANSITION

61	110	49
64	108	44
92	71	(21)
28	12	(16)
38	44	6
50	43	(7)
332	-	388
-	-	55

17%

OTHER GOALS⁽¹⁾:

STATE EDUCATION
CAREER INFORMATION & ASSESSMENT ONLY

50	50	-
78	86	8
166	136	8

5%

TOTAL SERVED 460 523 63 14%

1 *PARTICIPANT GOALS + OTHER GOALS = TOTAL SERVED

onestop operator is not included in cost per calc

Youth Basic Education/Dropout Recovery & Prevention includes 35 Moses Lake Youth and 50 Othello Youth (20 coenrolled state/federal, 5 federal only)

NOT INCLUDED IN THIS PRESENTATION IS \$80,000 OF COMPUTING FOR ALL TO PLACE INDIVIDUALS IN TECH POSITIONS

Chelan/Douglas Committee Meeting

June 12, 2024

SkillSource, Wenatchee WA

7

Members: Todd Wurl, Zach Williams, Michelle Price, Tom Legel, Ryan Beebout, Julie Helligso, Nate Mack

Staff: Lisa Romine, Susan Adams, Laura Leavitt, Aaron Parrott, Heidi Lamers, Christy Mataya, Kelli Martinelli, Lora Wood (ESD), Mitch Jordan

Guests: Seth Wendsel (WSU-CCE), Kyle McEan (AmeriCorps), Eco-Stewardship Students

Introductions and Updates:

Lisa thanked the members present for attending, led introductions and reviewed the agenda.

Eco-Stewardship Presentation

Students from SkillSource Wenatchee led a presentation on their experiences during the Eco-Stewardship paid cooperative work experience conducted by WSU Chelan County Extension. These young adults explained the work that they accomplished and what they took away from the experience, and answered questions from the committee. The staff and committee thanked them for their work and presentation.

Workforce Investment Performance Report

Aaron introduced the success story for this quarter, which outlined another youth project based learning team that supported the Special Olympics in Wenatchee this spring. Christy explained that this project had a balance of classroom and work-based learning, and included a paid incentive. Aaron reminded the committee members that SkillSource is one of the top implementers of work-based training activities across local boards.

Chelan/Douglas has achieved 95% of the total individuals served target, as of the end of Q3; as of the end of April they had exceeded the annual target. With Adult enrollment targets adjusted to account for the funds transferred from DW to Adult, they have achieved 88% of the annual target. DW enrollments are at 79%, the best among the 3 areas. Youth are 98% of enrollment target. Outcomes are generally positive as of Q3.

Participant enrollments in workforce education at WVC have increased slightly since Q2. Expenditures are at 57% with an obligation rate of 77%.

Susan briefly summed up the La Terraza de Main Street event that took place on May 11th, hosted by the Hispanic Business Council of the Wenatchee Valley Chamber of Commerce. SkillSource was the presenting sponsor, and took the opportunity to connect with businesses and career seekers in the Latino community. Susan also mentioned the Chelan/Douglas Workforce Collaboration Summit held at WVC on May 17th, attended by over 110 partner staff. The highlight of the event was a success panel featuring three SkillSource alumni.

Lisa called the committee's attention to the Wenatchee World's feature on the SkillSource Wenatchee Learning Center graduation ceremony, and SkillSource's nomination for the "World's Best" educational services. She also congratulated Julie and Cascade Vet Clinics on the long-awaited codification of the licensed veterinary technician registered apprenticeship as a recognized pathway to licensure.

Funds Transfer Request

Susan explained that normally the staff recommends a funds transfer from Dislocated Worker to Adult about 2/3 of the way through the year when necessary. This year, it is recommended to the board that a 30% transfer be conducted at the beginning of the year. There is an ongoing trend of much less demand for dislocated worker services through the five counties, and there are sufficient funds under the QUEST DWG to assist with those services. This allows management to set accurate performance targets from the beginning of the program year. Susan explained that in the case of large unexpected layoffs, funds can be requested to cover those needs. Ryan asked why funds were not being transferred to Youth; Lisa replied that federal regulations only allows fund transfers between Adult and Dislocated Worker. However, in years past, unexpended administrative funds have been transferred to Youth as needed.

Tom Legel moved and Zach Williams seconded to recommend approval of the described funds transfer to the full board. Motion carried.

2024-2025 Proposed Budget

Lisa gave a quick overview of the 2024-25 allocations. In general, funding for WIOA formula funds increased 12% for the state and 9% for the five-county area. This year, discretionary funding eclipsed federal formula funding, which will require funds braiding and increased administration. Chelan/Douglas's budget will increase by 21% overall; a large portion of this increase is incentives for participants. Susan summarized major increases and decreases; personnel increased by 31% (+2.4 FTE); work-based learning and vocational education decreased 18% and 13% respectively; basic education increased 8%; participant incentives increased 190%, largely driven by Community Reinvestment funding. Support is decreased 41% because increased incentives are offsetting support needs. Susan then summarized proposed enrollments, activities and total individuals served, as well as the twelve major funding streams involved in supporting service delivery and their increases or decreases from the previous year. Todd asked if cost of living had been accounted for; Laura responded that 4% cost of living increase had been included.

Tom Legel moved, and Zach Williams seconded, to recommend approval of the 2024-2025 Chelan/Douglas budget to the full board. Motion carried.

Policy Revisions/Updates

Lisa explained that in accordance with WorkSource System Policy 1028, changes to local directives are being presented to the Board for information and approval. Lisa will discuss with Zach Williams the best way to expedite minor policy changes in the future. Aaron summarized the changes:

- Local Directive 17-162 (Incumbent Worker Training) will be revised to include a third tier of 10% employer match for small businesses.
- Local Directive 22-179 (State EcSA Incentives) will be revised to add Community Reinvestment Fund incentives and adds activities eligible for incentives.
- Local Directive 22-180 (Economic Security for All) will be revised to align with state policy which excludes training costs from the \$5000 cap for participants from households at or above 200% of FPL.

Zach Williams moved, and Michelle Price seconded, to recommend approval of the proposed revisions to the local directives to the full board. The motion carried.

Community Reinvestment Updates

Lisa explained that the Community Reinvestment Fund will continue into the 2024-25 program year, and will include several new initiatives, including a small business grant program to help Black, Indigenous, and Latino-owned or operated businesses; contracting with community-based “By and For” organizations for outreach and referrals; and matched savings accounts which will be used along with performance incentives to financially benefit participants in training and education. This initiative focuses on Black, Indigenous and Latino populations as those groups were disproportionately affected by the War on Drugs. Lisa said that this is all new territory and that state policy is still being developed, but this is very exciting work and is the next step in the success stories that have been shared over the last year.

The meeting adjourned at 1:30 PM. The full board meeting will be held on Tuesday, June 25th at 5:30 PM via Zoom.

CHELAN/DOUGLAS BUDGET SUMMARY**PROGRAM YEAR 24-25**

	PY 23-24 M#1 APPROVED	% OF BUDGET	PY 24-25 PROPOSED	% OF BUDGET	INCREASE (DECREASE)	
PROGRAM						
PERSONNEL (salaries & benefits)	782,474	33%	1,024,816	36%	242,342	31%
PHYSICAL RESOURCES (supplies, equipment, facilities etc.)	221,508	9%	207,737	7%	(13,772)	-6%
BASIC EDUCATION	457,748	19%	493,749	17%	36,002	8%
COMPUTER BASIC EDUCATION	89,823	4%	81,505	3%	(8,318)	-9%
WORK BASED LEARNING	324,833	14%	266,896	9%	(57,937)	-18%
VOCATIONAL EDUCATION	249,429	10%	216,625	8%	(32,804)	-13%
INCENTIVES	190,000	8%	551,700	19%	361,700	190%
SUPPORT	73,032	3%	43,413	2%	(29,619)	-41%
TOTAL	2,388,846		2,886,440		497,594	21%

ACTIVITY GOALS:**BASIC EDUCATION**

ADULT and DISLOCATED WORKER

YOUTH (federal only)

STATE EDUCATION / ADULT BASIC EDUCATION

-	-	-	
15	15	-	
210	210	-	
225	225	-	0%

WORK BASED LEARNING

INCUMBENT WORKER TRAINING

ON-THE-JOB TRAINING

WORK EXPERIENCE / INTERNSHIP / PROJECT BASED

60	53	(7)	
27	29	2	
63	58	(5)	
150	140	(10)	-6%

VOCATIONAL EDUCATION

VOCATIONAL TECHNICAL EDUCATION

COMPUTER BASICS

73	72	(1)	-1%
45	45	-	0%
118	117	(1)	-1%

PARTICIPANT GOALS:

YOUTH

ADULT & ECONOMIC SECURITY FOR ALL (State)

DISLOCATED & DISCRETIONARY DW

ECONOMIC SECURITY FOR ALL (Federal)

COMMUNITY REINVESTMENT BUSINESS SERVICES & TRAINING

PRE-EMPLOYMENT TRANSITION

57	68	11	
54	81	27	
78	55	(23)	
20	16	(4)	
36	41	5	
50	50	-	
296	311	16	5%

OTHER GOALS:

STATE EDUCATION/ADULT BASIC EDUCATION

CAREER INFORMATION & ASSESSMENT ONLY

210	210	-	
101	104	3	
347	314	3	1%

TOTAL SERVED:

606	625	19	3%
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CHELAN/DOUGLAS
24-25 BUDGET SUMMARY BY FUND TYPE

6/3/24 11:45 AM				ECONOMIC	ECONOMIC	COMMUNITY		REINVESTMENT	ECONOMIC				PY 24-25	APPROVED	CHANGE	%
	ADULT	DISLOCATED WORKER	NDWG QUEST	SECURITY (STATE) Below 200%	SECURITY (STATE) Above 200%	BUSINESS NAVIGATOR	BUSINESS SERVICES & TRAINING	INCENTIVES & MATCHED SAVINGS ACCOUNTS		SECURITY (FEDERAL)	YOUTH	PRE EMPLOYMENT TRANSITION	STATE BASIC EDUCATION			
SALARIES	131,384	79,907	17,347	46,221	21,411	19,223	42,956	72,757	27,848	137,239	64,449	90,792	751,532	573,229	178,304	31%
BENEFITS	48,025	26,383	5,584	18,068	8,190	5,957	15,140	28,095	10,871	50,631	27,053	29,287	273,283	209,245	64,038	31%
TRAVEL	949	521	110	357	162	118	299	555	215	1,000	535	579	5,400	5,400	-	0%
MISCELLANEOUS	7,415	2,335	692	1,599	725	513	3,569	2,227	962	18,981	2,394	3,274	44,686	53,472	(8,786)	-16%
SUPPLIES	5,916	3,250	688	2,226	1,009	734	1,865	3,461	1,339	15,237	3,333	11,608	50,667	48,667	2,000	4%
EQUIPMENT	1,757	965	204	661	300	218	554	1,028	398	1,853	990	1,072	10,000	20,000	(10,000)	-50%
FACILITIES	14,366	7,892	1,670	5,405	2,450	1,782	4,529	8,404	3,252	15,146	8,093	8,761	81,750	77,548	4,201	5%
COMMUNICATION	1,799	988	209	677	307	223	567	1,052	407	1,896	1,013	1,097	10,235	11,422	(1,188)	-10%
STAFF TRAINING	984	541	114	370	168	122	310	576	223	1,038	554	-	5,000	5,000	-	-
ON-THE-JOB TR / WORK EXP/INCUMB WRKE	42,000	25,000	10,000	-	-	-	55,695	-	-	91,026	43,175	-	266,896	324,833	(57,937)	-18%
VOCATIONAL EDUCATION	131,047	23,366	6,634	4,000	2,090	-	-	-	47,238	-	-	2,250	216,625	249,429	(32,804)	-13%
BASIC EDUCATION	-	-	-	-	-	-	-	-	-	27,870	-	-	465,880	493,749	457,748	8%
COMPUTER BASICS	50,714	21,735	9,056	-	-	-	-	-	-	-	-	-	81,505	89,823	(8,318)	-9%
INCENTIVES/MSA'S	-	-	-	34,000	9,000	-	-	492,000	-	12,200	4,500	-	551,700	190,000	361,700	190%
SUPPORT SERVICES	10,917	7,029	1,002	3,889	3,030	-	-	-	3,255	7,325	783	6,183	43,413	73,032	(29,619)	-41%
GRAND TOTAL	447,274	199,912	53,312	117,473	48,841	28,889	125,484	610,156	96,007	381,442	156,870	620,781	2,886,441	2,388,847	497,594	21%
EXPENDITURE PROJECTIONS	447,274	199,912	53,312	117,473	48,841	28,889	125,484	610,156	96,007	381,442	156,870	620,781	2,886,441			
REMAINING TO BUDGET	(0)	0	(0)	0	(0)	(0)	(0)	0	(0)	0	(0)	0	0			
PY 23-24 BUDGETS	ADULT	DISLO	NDWG	SEcSA<200%	SEcSA>200%	Bus Navig	CRF BS&T	CRF Incent	EcSA Federal	YOUTH &	PREEMP	STATE ED		97,515	cost per staff fte	
AMOUNT (DECREASE) INCREASE	250,477	261,082	236,389	155,778	77,596	37,803	106,087	84,000	132,878	318,578	143,049	585,132	2,388,847			
% CHANGE	196,797	(61,170)	(183,077)	(38,305)	(28,755)	(8,914)	19,397	526,156	(36,871)	62,864	13,821	35,649	497,594			
	79%	-23%	-77%	-25%	-37%	-24%	18%	626%	-28%	20%	10%	6%	21%			budget increase (decrease) %
PY 24-25 GOAL PROJECTIONS														57%		
PARTICIPANT GOALS	ADULT	DISLO	NDWG	EcSA <200%	EcSA >200%	Bus Navig	Com Reinv Biz	Com Reinv Incent	EcSA Federal	YOUTH	PREEMP	ABE/BSK	625	606	19	3%
total enrolled participants	81	44	11	34	10	-	41	44	16	68	50	210	521	506	16	3%
carryin	20	9	9	21	5			26	11	40	25		166	156	10	6%
new	61	35	2	13	5		41	18	5	28	25		355	350	6	2%
ACTIVITY GOALS																
Incumbent Worker Training		25					28						53	60	(7)	-12%
On-The-Job Training / Work Experience	16	-	1	-	-		13		-	33	24	-	87	90	(3)	-3%
Vocational Education	37	7	5	1	1		-		16	-		5	72	73	(1)	-1%
Basic Education	-	-	-						-	49		210	225	225	-	0%
Computer Basics	28	12	5							-			45	45	-	0%
Work Readiness											50		50	50	-	0%
Total Activities	81	44	11	1	1		41		16	82	74	215	532	543	(11)	-2%
OUTPUT GOALS																
Placements	37	22	6							25			90	129		
Cost Per Placement	\$12,008	\$8,966	\$9,628							\$15,079			\$13,271	\$9,501		
Credentials	44	24	6							20			93	138		
Cost Per Credential	\$10,273	\$8,462	\$9,086							\$18,811			\$11,024	\$6,004		
OTHER PLANNING GOALS																
# service delivery staff fte	2.21	1.22	0.26	0.83	0.38	0.27	0.70	1.29	0.50	2.33	1.25	1.35	12.59	10.20	2.39	23%
# fte trainer	1.61	0.89	0.19	0.61	0.28	0.20	0.51	0.94	0.37	1.70	0.91	-	8.19	6.00	2.19	37%
# participants per trainer	50	50	59				81		44	40	55		38	49	(11.20)	
# total staff (sd & instructional)	2.65	1.40	0.34	0.83	0.38	0.27	0.70	1.29	0.50	2.59	1.25	5.60	17.80	15.30	2.50	16%
participants less activities	(0)	0	-						-	(14)	(24)		0.00			
cost per participant	\$5,548	\$4,514	\$4,847	\$3,455	\$4,884	N/A	\$3,036	\$13,867	\$6,000	\$5,609	\$3,137	\$2,956	\$5,538	\$4,725	\$813	17%

NOT INCLUDED IN THIS PRESENTATION IS \$80,000 OF COMPUTING FOR ALL TO PLACE INDIVIDUALS IN TECH POSITIONS

Executive Committee Meeting Report
Executive Budget
June 12, 2024
Wenatchee- Combined in person & Zoom

Board: Michelle Price, Zach Williams, Tom Legel & Roni Holder-Diefenbach (via zoom)

Staff: Lisa Romine, Laura Leavitt

Formula Grants Overview

The national Workforce Investment appropriation (Adult, Youth, & Dislocated Worker formula grants) remained essentially flat but Washington State's share increased \$6.8M or 12%. Further, North Central's share of the State Youth, Adult, and Dislocated Worker allocation increased \$598K or 22%.

Unemployment statistics drive two-thirds of a three-part formula for Adult and Youth grants whereas the Dislocated Worker grant formula is comprised 100% of unemployment statistics. Olympia applies data at the county level to allocate funds to the 12 local Areas. Of the State allocation, North Central received 6.15% of the Youth, Adult and, Dislocated Worker funding.

Executive Budget Functions

The Executive Budget provides *fiscal agent functions* - (contract and grant management, finance and accounting, audit, budget, procurement, personnel & property management); *board functions* - such as strategic planning, convening stakeholders, service delivery oversight and technical assistance, performance management, compliance monitoring, facility management and reporting; *One-Stop functions* - Operator Agreements, Memoranda of Understanding, Infrastructure Funding Agreements; *other functions* - capacity building, pathway development, sector partnerships and business engagement.

Income Table I

North Central 23-24 formula grants increase \$582,000 (22%) to \$3.2M compared to this year. Discretionary & Other projected income increases \$1.5M or 47% year-over-year. This group of income resources includes four Economic Security-for-All contracts, two Community Reinvestment contracts, two Technology sector related job placement contracts, Pre-Employment Transition for Students and State Basic Education. Overall, new revenue is up \$2.1M (36%) from \$6M to \$8.1M.

\$1.8M is carried over from this year (23-24) to bring total projected revenue to nearly \$9.9M compared to \$7.4M this year. Total funds available for Executive functions increase \$432,000 (28%) compared to the current year. Our budgeted excess increases from \$140,000 to \$168,000.

Expenses Table II

Salaries & Benefits increase \$94,018 (9.5%). Staff increases from 9.5 FTE to 10 FTE. The increase in FTE is due to the Business Navigator being budgeted in the current year at .5 FTE. Staff are budgeted at their next pay step (5%-6% increase) and for those at the top 4% is budgeted if the top of the scale is raised. A salary survey/update is currently underway. Health Insurance premiums are budgeted at current rates plus a potential 5% increase.

Miscellaneous budget increases \$48,000. Added this year; Launch Pad, a customer relations management platform (\$16,500), a procurement manager (\$25,000), and independent monitoring services (\$40,000). The State Workforce Board is still working on a policy that may require local areas choosing to direct deliver WIOA

services to competitively procure all WIOA services and hire a third party to monitor programs in addition to our current State Monitoring, Audit, and internal monitoring. Lisa continues to advocate for maximum flexibility to directly deliver services as allowed in the law. Audit and accounting services increase 9%. Decreases this year; Banquet, scheduled alternating years (-\$20,000), network, website & CMS maintenance and enhancements, decrease from \$26,000 to \$16,000 (\$10,000 reduction), and Outreach & promotion media, decrease of \$15,000 from \$50,000 to \$35,000.

Equipment decreases by \$3,000. All executive staff computers have been upgraded to Windows 11 compliant machines.

Board & Staff training increases slightly. Fifteen (15) staff will attend the State Workforce Conference put on by the Washington Workforce Association in early November. Also included is \$32,000 for staff workshops & seminars, \$28,000 for 3 board members and 4 staff to attend national conferences; \$20,000 for a Board retreat and \$10,000 for a staff retreat.

Service Delivery subcontracts under Community Reinvestment funding are included. One Hundred Thousand (\$100,000) is budgeted for contracts with By and For Organizations to refer and serve individuals and businesses from the target population in our five counties. One Hundred Fifty Thousand (\$150,000) is budgeted for small business grants to BIPOC businesses.

Budgeted administrative costs are 7% of total budgeted expenses no change from the current year. This is compared to the maximum rate of ten percent allowed by Federal policy. Projected executive costs are 16% of total compared to 18% this year. The proposed budget leaves a reserve of \$168,000 for unexpected costs, service delivery opportunities, or use the following year.

Michelle Price moved and Tom Legel seconded recommending Board approval of the Executive Budget. Motion carried.

2024-2025 EXECUTIVE BUDGET
ESTIMATE OF REVENUES AND EXPENDITURES
RESTRICTED FUNDS

ESTIMATED REVENUE	PROGRAM YEAR 24-25							COMPARISON			
	A	B	C	D	E	F	G	PROGRAM YEAR 23-24 MODIFICATION 1 APPROVED		J	K
			(A+B)	(C*.10)	(C*.12)	(D+E)	(C-F)	H	I		(F-J)
	ALLOCATION			TOTAL				ALLOCATION	increase	EXECUTIVE	
FORMULA FUNDING*	ALLOCATION	TRANSFER	AFTER TRANSFER	ADMINISTRATION	PROGRAM	EXECUTIVE	SERVICE DELIVERY	reflects transfer	(decrease)	EXECUTIVE	inc (dec)
Adult	1,125,392	284,489	1,409,881	112,539	169,186	281,725	1,128,156	1,080,363	329,518	216,073	65,652
Youth	1,168,776		1,168,776	116,878	140,253	257,131	911,645	862,470	306,306	172,494	84,637
Dislocated Worker (mitig est	948,298	(284,489)	663,809	94,830	79,657	174,487	489,322	717,362	(53,553)	143,472	31,014
Total Formula Revenue	3,242,466	-	3,242,466	324,247	389,096	713,343	2,529,123	2,660,195	582,271	532,039	181,304
						22%	78%		22%		34%
DISCRETIONARY & OTHER								DISCRETIONARY & OTHER			
National DW Grant Quest			-	-	-	-	-	701,816	(701,816)	299,877	(299,877)
Federal Economic Security for All PY23			141,175		16,941	16,941	124,234	-	141,175	-	16,941
State Economic Security for All (EcSA) <200%			376,516	37,652	45,182	82,834	293,682	389,445	(12,929)	77,889	4,945
State Economic Security for All (EcSA) >200%			156,543	15,654	18,785	34,439	122,104	193,900	(37,357)	38,780	(4,341)
State EcSA Business Navigator			108,333	10,833	10,833	21,667	86,666	126,934	(18,601)	25,387	(3,720)
Community Reinvestment BIPOC Business Services PY23 yr 2 of			419,022	27,481	242,110	269,591	149,431	419,022	-	90,335	179,256
Community Reinvestment Incentives & Individual Development			1,649,506	127,117	72,389	199,506	1,450,000	227,390	1,422,116	17,390	182,116
Career Connect Network			33,000	2,970	3,030	6,000	27,000	30,000	3,000	3,000	3,000
Computing for All			200,000	20,000	20,000	40,000	160,000	-	200,000	-	40,000
Job Corps Placement			229,715	17,749	17,749	35,498	194,217		229,715		35,498
Preemployment Transition Services (est expenses)			415,000	41,500	-	41,500	373,500	189,000	226,000	18,900	22,600
High School 21+ (CD only)			24,951	2,491	-	2,491	22,460	24,951	-	2,491	-
OSPI LAP (CD only)			26,000	-	-	-	26,000	24,951	1,049	-	-
OSPI School Improvement (CD & Othello only)			110,000	-	-	-	110,000	70,000	40,000	-	-
OSPI OD Summer Pilot			70,000	-	-	-	70,000	-	70,000	-	-
State Basic Education (est. expenses)			915,678	112,168	-	112,168	803,510	915,678	-	98,568	13,600
Total Discretionary Revenue			4,875,439	415,615	447,019	862,634	4,012,805	3,313,087	1,562,352	672,616	190,018
						18%	82%		47%	20%	28%
TOTAL FORMULA & DISCRETIONARY REVENUE			8,117,905	739,862	836,115	1,575,977	6,541,928	5,973,282	2,144,623	1,204,655	371,322
						19%	81%		35.9%	18%	31%
PRIOR YEAR CARRY-IN			1,762,273	285,469	93,815	379,284	1,382,989	\$1,455,652	306,621	318,425	60,859
GRAND TOTAL REVENUE			\$9,880,178	1,025,331	929,930	1,955,261	7,924,918	\$7,428,934	2,451,244	1,523,080	432,181
									33.0%		28%
	TOTAL	ADMINISTRATION	PROGRAM	EXECUTIVE	SERVICE DELIVERY	TOTAL	EXECUTIVE	TOTAL		EXECUTIVE	
ESTIMATED EXPENSES			9,712,287	638,129	1,149,241	1,787,369	7,924,918	\$7,288,703	2,423,584	1,388,001	399,368
									33.3%		29%
BUDGETED EXCESS/(DEFICIT)			\$167,891	387,202	(219,310)	167,891	-	\$140,231	27,660	135,079	32,812
% ADMINISTRATION TO TOTAL			6.7%						6.9%		
% EXECUTIVE TO TOTAL			16.2%						17.9%		

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* formula funding amounts based upon TEGL 12-23 and updated county allocations

TABLE II
2024-2025 EXECUTIVE BUDGET SUMMARY
OBJECT OF EXPENSE BY PROGRAM YEAR
RESTRICTED FUNDS

	Mod 1					
	PY 23-24	PY 23-24	PY 24-25	%		
		ESTIMATED				
	APPROVED	ACTUAL	PROPOSED	OF TOTAL	CHANGE	
SALARIES	\$763,121	\$716,571	\$830,244	46%	67,123	9%
BENEFITS ¹	215,656	147,132	242,551	14%	26,895	12%
TRAVEL	28,000	24,274	29,950	2%	1,950	7%
MISCELLANEOUS	210,289	160,044	258,560	14%	48,270	23%
SUPPLIES	21,760	19,338	21,760	1%	-	0%
EQUIPMENT	10,000	8,697	7,000	0%	(3,000)	-30%
FACILITIES	25,104	27,238	29,746	2%	4,642	18%
COMMUNICATIONS	8,009	10,922	7,558	0%	(451)	-6%
TRAINING & DEVELOPMENT	106,061	60,662	110,000	6%	3,939	4%
SUBTOTAL	1,388,001	1,174,878	\$1,537,369	86%	149,368	11%
SERVICE DELIVERY SUBCONTRACTS	-	-	250,000	14%	250,000	#DIV/0!
GRAND TOTAL	1,388,001	\$1,174,878	\$1,787,369	100%	399,368	29%

¹ Benefits Exchange (waive) insurance for increased wages. During PY2324 three executive staff waived insurance receiving 40% the value of the premium as extra pay

SkillSource Regional Workforce Board (WDA 8)

Local Directive Review Summary

June 2024

Note: This item was recommended for board approval by all three sub-area committees, June 10 – 12, 2024.

In accordance with [WorkSource System Policy 1028](#) (dated February 29, 2024), the following changes to local directives are being presented to the directors of the SkillSource Regional Workforce Board for information and approval.

1. INCUMBENT WORKER TRAINING: The following changes to Local Directive 17-162 (Incumbent Worker Training) are proposed, resulting in Revision 4. Aligns with State Policy [5607 R6](#)

a) Change employer cost match amounts to align with federal and state policy; update application form accordingly.

Current Wording: Local Directive 17-162 Rev 3 currently provides the following employer cost match tiers: Employers applying for IWT funding will pay the following minimum match percentages:

- 25 percent of the cost, for employers with fewer than 100 employees; and
- 50 percent of the cost, for employers with more than 100 employees.

Proposed Change:

Employers applying for IWT funding will pay the following minimum match percentages:

- 10 percent of the cost, for employers with 50 or fewer employees
- 25 percent of the cost, for employers with 51 to 100 employees; and
- 50 percent of the cost, for employers with more than 100 employees.

Rationale: When SkillSource first began to offer incumbent worker training in 2018, federal and state policy allowed for three tiers; however, SkillSource limited IWT match to two tiers. As SkillSource attempts to serve more small businesses with incumbent worker training, adopting the 10% tier for smaller businesses will incentivize participation and be more in line with state and federal limits.

b) Updated references to state policy revisions. Self-explanatory.

2. EcSA INCENTIVES: The following changes are proposed to Local Directive 22-179 (Incentive Payments for State Funded EcSA Participants) to align with [State Policy 7000](#) and [WIN 0140](#)

a) Adds Community Reinvestment Fund (CRF) incentives.

Rationale: Participants are eligible to receive up to a \$1,000 per month of State and/or CRF incentive during a 12-month period.

b) Expands participant individual career plan options to be eligible to receive performance incentives.

Rationale: SkillSource has limited performance incentives to only those attending vocational education. This revision allows a wider range of participants to benefit from EcSA and CRF incentives in additional activities such as on-the-job training, workforce preparation & education, employment retention, etc. Coupled with a career plan and regular check ins with their career counselor, incentives help move people towards self-sufficiency. Performance expectations and requirements will be in place for all participants in order to receive monthly incentives.

3. EcSA Above 200% of Federal Poverty Level (FPL): The following changes to Local Directive 22-180 (Economic Security for All) align with updated state guidance in [State Policy 7000](#).

1) Eliminates the \$5000 training cost cap for participants from households at or above 200% of FPL.

Rationale: State policy has changed and will exclude the cost of training in the \$5000 cap.

2) Updated references throughout.



Work-Based Training

... is a Win-Win

Local talent is the best-kept secret for businesses. SkillSource helps employers find and train great candidates through programs that defray the cost to the business. When we invest in people, we all win.



A tech apprenticeship led Noah to a full time Computer Tech job with Wenatchee School District.



Client Testimonial

Moses was hired through On-The-Job Training, and it has been awesome. The program paid for a portion of his wages through the training period and this made it possible for us to bring on another employee. He is now a key part of our team and I would absolutely use this program again.

- Steve Ott, Wenatchee Wind



Incumbent Worker Training

- Upgrade training for current workers
- Retain employees & avoid layoffs
- Promote from within for vital roles
- Paid training assistance up to \$4,000 per employee

On-The-Job Training

- Increase skilled workforce
- Increase profitability
- Reduce turnover & training costs
- Wage reimbursement from \$3000 - \$6000

Registered Apprenticeship

- On-the-job learning with related classroom instruction
- Fosters employee loyalty
- Improves employer bottom line

Work Experience

- Trainees gain work readiness & job skills
- Businesses gain job support prior to making a commitment to hire
- Wages paid by SkillSource, \$16.28/hr

Internship

- Occupational skills training for an existing position
- Employers agree to hire upon successful completion
- Training wages paid by SkillSource

more details >

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WORK-BASED TRAINING SOLUTIONS



INCUMBENT WORKER TRAINING

Incumbent worker training helps qualifying companies **upgrade the skills of existing employees** to help the company remain competitive, increase profits, and support company growth. Employees with new skills earn higher wages and increase their responsibilities. Train one or multiple employees. SkillSource can pay up to \$25,000 of training assistance per year and up to \$4,000 per employee. Employees must have 6 or more months experience working for your company (exceptions apply for trainee cohorts). SkillSource will help businesses cover training costs. The employer will share 25% or 50% of the cost depending on the size of the firm. This cost share may be met with employee wages during the training.

ON-THE-JOB TRAINING

For many workers, a job is the best teacher. On-the-Job Training (OJT) helps businesses reduce their turnover expenses and increase their skilled workforce. Businesses work with SkillSource to develop the training plan, then interview, hire & train eligible candidates (typically ages 18+) during an introductory period. Through a signed OJT agreement, **SkillSource reimburses the business up to 75% percentage** of the trainee's earned wages during that period. SkillSource also can provide the trainee assistance with tools & equipment, work clothes, childcare, and transportation to ease the cost of transitioning into a new job. Typically, OJT reimbursements range from \$3000- \$6000.

REGISTERED APPRENTICESHIP

Registered Apprenticeship is an employer-driven model that **combines on-the-job learning with related classroom instruction** that increases an apprentice's skill level and wages. Apprenticeship is a flexible training strategy that can be customized to meet the needs of every business. Apprentices can be new hires, or businesses can select current employees to join the apprenticeship program. **SkillSource can help businesses with resources to gain approval of a Registered Apprenticeship** program with the Washington State Department of Labor and Industries. Upon completion of a program, apprentices become journey level professionals with a recognized industry certification.

WORK EXPERIENCE

Work Experience activities are designed to help trainees (typically ages 16-24) **gain the experience they need to demonstrate work readiness skills**. Trainees are placed with a business while SkillSource pays their wages (minimum wage \$16.28/hour) for a designated period of time (usually 200 hours), roughly equaling \$3600. Work Experience may be implemented as a "pre-apprenticeship" type activity and helps the trainee learn about the job, the company and develop job skills. This gives the business an opportunity to learn how interested and capable the trainee is prior to a hiring or ongoing training commitment. SkillSource is the employer of record and covers all required taxes and fees including worker's compensation, unemployment insurance, etc.

INTERNSHIP

Internship provides participants (all ages 16+) **with occupational skills training for an existing position** with a private, public or non-profit business. This activity is appropriate for individuals who have demonstrated pre-employment skills competencies and are ready for occupational training. SkillSource pays a training wage equivalent to the employer's entry level wage for the specific position (200-500 hrs). Upon successful completion, the employer agrees to hire the participant for at least 50% of the SkillSource paid internship hours, provided the intern satisfactorily completes the training, and subject to continued satisfactory job performance. Length of internship training is subject to each individual trainee's skill gap.



SkillSource Regional Workforce Board

2024-25 Meeting Calendar

September 2024	9	Okanogan Committee
	10	Grant/Adams Committee
	11	Chelan/Douglas Committee
	24	Board Meeting 5:30 pm – via Zoom
November 2024	18	Okanogan Committee
	19	Grant/Adams Committee
	20	Chelan/Douglas Committee
December	03	Board Meeting 5:30 pm – via Zoom
March 2025	3	Okanogan Committee
	4	Grant/Adams Committee – TBD
	5	Chelan/Douglas Committee - TBD
	18	Board Meeting 5:30 pm – via Zoom (Possible date change if Board Retreat is scheduled for 3/13-14, 3/20-21 or 3/27-28)
June 2025	9	Okanogan Committee – TBD
	10	Grant/Adams Committee - TBD
	11	Chelan/Douglas Committee - TBD
	24	Board Meeting 5:30 pm – via Zoom

Committee Meetings: Noon – 1:30PM and include lunch
Board Meetings: 5:30 – 7:00PM

SkillSource Regional Board Membership Composition

This roster conforms to WIOA section 107(b)(2) Local Workforce Development Board Membership Composition. The information informs the Governor for certification under WIOA Section 107(c)(2).

Required categories	Name/Title/Organization	Nominated by	Year Appt	Term Expires
Business (51% minimum)				Dec 31
1. Business	Crystal Gage/ Practice Manager/ Omak Clinic	OK Economic Alliance	2019	2026
2. Business	Anthony Popelier / HR Dir/ Reman Reload	OK Economic Alliance	2023	2027
3. Business	Roni Holder-Diefenbach/ Exec Dir/ Ok Econ All	Career Path Services	2005	2024
4. Business	Annette Herup / HR Manager / Genie-Terex	Grant Co EDC	2019	2026
5. Business	Tad Hildebrand /Consultant/ Nash Consulting	Adams Co Dev Council	2017	2027
6. Business	Ken Johnson/ Owner/ Johnson's Glass & More	Adams Co Dev Council	2014	2027
7. Business	Brant Mayo/Executive Dir/Grant Co EDC	Grant Co EDC	2018	2024
8. Business	Ryan Beebout/ VP/ Sabey Data Centers	Wenatchee Chamber	2023	2027
9. Business	Tom Legel / CFO/ Confluence Health	Wenatchee Chamber	2023	2026
10. Business	Julie Helligso /Exec Director/ Cascade Vet	Wenatchee Chamber	2023	2026
11. Business	Zach Williams /HR Manager/ Stemilt Growers	Wenatchee Chamber	2021	2024
Workforce/Labor (20% minimum)				
1. Labor	Nathan Mack/ Field Representative/LiUNA 348	Central Labor Council	2023	2027
2. Other workforce	Michelle Price/ Superintendent /NC ESD	North Central ESD	2009	2024
3. Other workforce	Irasema Ortiz-Elizalde/ Administrator/ DSHS	DSHS	2013	2027
4. Labor	Augustine Gallegos / Bus Agent / Teamsters	Central Labor Council	2021	2024
5. Labor/Apprentice	Randy Curry / President /IBEW #191	Central Labor Council	2021	2024
Education				
1. Title II Adult Ed	Sara Thompson-Tweedy/ President / BBCC	Big Bend Comm College	2021	2024
2. Workforce Ed	Famous Harrison / President / WVC	Wenatchee Valley College	2023	2026
Public				
1. Wagner-Peyser	Todd Wurl/ Regional Director/ ESD	Employment Sec Dept	2023	2027
2. Vocational Rehab	Pablo Villarreal/ Acting Regional Director/ DVR	Div Vocational Rehab	2019	2026
3. Econ Dev	Kyle Niehenke/ Ex. Dir/ Adams County ED	Adams Co Dev. Council	2023	2026

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Okanogan	Chelan/Douglas	Grant/Adams
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North Central Workforce Development Area
Quarterly Success Stories
June 2024

Donated Car Helps A Single Mom Go Farther

In February SkillSource received a donated car from a member of our Wenatchee community. The car was in need of some maintenance, but otherwise was in great shape. Lisa Romine, SkillSource CEO, received the keys and the title from the prior owner, Lucy Clark. SkillSource then used supportive service funds to get the donated car road-ready so it could be passed along to a participant in need of transportation to get to work and training.

Darlene is a single mother of two who was new to Moses Lake, and needed a good job. She attended the SkillSource Job Fair and was approached by a staff member to find out how her search was going and if she could use some help. Darlene learned that SkillSource partners with local businesses to develop on-the-job training opportunities to help trainees earn while they learn. Armada Corp, a local collection agency, had an opening that seemed to be just the right fit for Darlene so SkillSource connected her to Amanda Sampley, the manager at Armada. Shortly thereafter, Darlene was hired to train on the job!

SkillSource worked with Armada on a training plan and also provided Darlene with support services, including appropriate work attire and connections to housing and other resources for her children. Since being hired by Armada, Darlene has learned new computer skills, mail handling, front desk duties, state and federal collection laws, coding, typing, and how to handle lawsuits. We are so happy to see Darlene thrive in her new position, and we are grateful to Armada for partnering with SkillSource to help find and train great candidates like Darlene!

In April the donated car received its final repairs, including new brakes, fluids and tires and a thorough detailing. Ken Johnson, SkillSource Board Member and local business owner, came by to present Darlene with the car, keys, and title of ownership to Darlene. The entire Armada team came out to the parking lot to celebrate! Darlene recently had to rent a U-Haul truck in order to get groceries, which not only isn't financially sustainable, it's an obstacle to self-sufficiency. Today, that obstacle is gone. And Darlene now has the means to transport herself to work, to support her children as they grow, and to continue confidently on her road to success!

Thank you to everyone who helped make this incredible opportunity possible. When community shows up for each other, we all go farther.



Building Skills in Project Based Learning

Project based learning (PBL) is an interactive way for youth in the SkillSource Learning Center to gain work readiness and leadership skills, while also having fun! The six-week long project offers students paid incentives so that they can earn while they learn new skills that will be useful in the future. This year's PBL began in early February when five students came together with their career counselors, Mitch and Bea, to develop a project for the Special Olympics Winter Games. During the first half of their project, the students learned about different disabilities through various class activities and videos. They learned about how disabilities aren't always visible, and they even ventured out into town with a wheelchair, where they discovered obstacles to accessibility, and what it felt like to be treated differently due to a perceived disability.

The second half of the project was hands-on. The five students – Parker, Kolton, Stacy, Shyanna, and Dawson — decided to build a corn hole game from scratch, and decorate it with an “Under the Sea” theme. The students went shopping for the materials to build their game, and then set out with the right tools to measure, cut, shape, sand, paint, and decorate. When asked what the most difficult part of the project was, Kolton and Dawson responded that it was tricky when drilling holes to make sure the wood didn't crack and split!

The students volunteered at Special Olympics events up at Mission Ridge, attended the Opening Ceremony at Town Toyota Center, and set up the cornhole game at Olympic Town at the Wenatchee Convention Center. The game was a huge hit, and the students handed out prizes to all who participated. They also had art supplies and stickers on hand so participants could decorate their own gold crowns. Smiles were abundant, and a sense of accomplishment and pride were well-earned. Great job, students!



Chelan/Douglas

Experience Equals Opportunity

On April 9, 2024, nearly 80 people came together to share best practices and resources at the Omak Workforce Collaboration Summit. The summit was held at the Omak Elk's Lodge and WorkSource Okanogan, presented by WorkSource system partners SkillSource, OIC of Washington, Employment Security Department, and Washington State Department of Social and Health Services.

The summit was designed to support employees in Okanogan County who work with the public to help people achieve lifelong success and self sufficiency. This includes front-line staff and supervisors at non-profits, community based organizations, government entities, and service focused businesses. Session topics ranged from diversity in hiring, resources for assistance with utilities and housing, reducing recidivism with pre and post-release support, addressing childcare needs, upskilling workers and helping businesses and workers reach their potential, and more.

Thank you to the summit's keynote speakers Tamar Jackson and Kelly Brickhouse from the Workforce Center of Pierce County, and to SkillSource CEO Lisa Romine and Todd Wurl, Regional Director of Washington State Employment Security Department for helping us open and close the day. We are grateful for the opportunity that the day afforded us to have critical conversations about the resources, benefits, services, and opportunities available, and how to better increase their accessibility to the community.

Thank you to all the partners and presenters who took the time to come together in Omak for this valuable summit!



SkillSource
Statement of Financial Position
As of 3/31/2024

	<u>Current Year</u>	<u>Beginning Year Balance</u>
Assets		
Current Assets		
Cash and Cash Equivalents	1,293,876.03	1,083,584.41
Trade Receivables	359,689.38	385,834.11
Due from Government	0.00	143,118.15
Other Receivables	4,652.24	1,076.53
Prepaid Expenses	<u>80,186.80</u>	<u>34,089.46</u>
Total Current Assets	1,738,404.45	1,647,702.66
Property and Equipment		
Land	813,350.61	813,350.61
Land Improvements	724,495.59	724,495.59
Building and Equipment	4,944,019.41	4,932,765.32
Construction in Process	411.75	0.00
Less: Accumulated Depreciation	<u>(3,068,784.72)</u>	<u>(2,942,936.94)</u>
Total Property and Equipment	3,413,492.64	3,527,674.58
Other Assets		
USDA Reserve	<u>160,852.85</u>	<u>158,704.23</u>
Total USDA Reserve	<u>160,852.85</u>	<u>158,704.23</u>
Total Other Assets	<u>160,852.85</u>	<u>158,704.23</u>
Total Assets	<u>5,312,749.94</u>	<u>5,334,081.47</u>
Liabilities		
Current Liabilities		
Accounts Payable	50,297.86	136,123.48
Accrued Wages and Benefits	22,595.60	11,708.40
Accrued Vacation	163,658.43	150,427.51
Accrued Interest	<u>2,669.74</u>	<u>2,669.74</u>
Total Current Liabilities	239,221.63	359,223.63
Long-Term Debt		
Long-term debt	<u>2,286,458.34</u>	<u>2,329,957.91</u>
Total Liabilities	2,525,679.97	2,689,181.54
Net Assets		
Unrestricted	<u>2,787,069.97</u>	<u>2,703,194.43</u>
Total Net Assets	<u>2,787,069.97</u>	<u>2,703,194.43</u>
Total Liabilities and Net Assets	<u>5,312,749.94</u>	<u>5,392,375.97</u>

10 - Executive

7-1-23 thru 3-31-24	Budget		
	<u>Total</u>	<u>Mod 1</u>	
Expenditures			
Salaries & Benefits	650,533	972,989	67%
Travel	14,407	28,000	51%
Miscellaneous	142,348	210,289	68%
Supplies	15,609	21,760	72%
Equipment	4,795	10,000	48%
Facilities	17,081	25,104	68%
Communication	7,775	8,009	97%
Training	<u>48,437</u>	<u>106,061</u>	46%
Total Executive	900,983	1,382,213	65%

20 - Chelan/Douglas

7-1-23 thru 03-31-24	Total	Budget Mod-1	Expenditure Rate	Obligation thru 6/30/2024	Obligation Rate
Expenditures					
Training related expenditures					
Salaries & Benefits	510,610	782,474	65%		
Travel	1,872	5,400	35%		
Miscellaneous	22,384	53,472	42%		
Supplies	20,874	48,667	43%		
Equipment	1,413	20,000	7%		
Facilities	51,870	77,548	67%		
Communication	4,015	11,422	35%		
Training	42	5,000	1%		
Total Training Related	<u>613,081</u>	<u>1,003,983</u>	61%	841,442	84%
Direct Training					
Incumbent Worker	18,175	60,000	30%	29,800	50%
On the Job Training	22,026	77,400	28%	23,594	30%
Participant Wages	41,992	187,433	22%	65,969	35%
Institutional Training	103,615	249,429	42%	136,488	55%
Basic Skills Training	321,908	457,748	70%	429,211	94%
Computer Basics	61,408	89,823	68%	81,877	91%
Support services					
GED Fees	5,126				
Incentives	138,970				
Housing	5,861				
Transportation	3,394				
Participant Insurance	222				
Supportive Services Other	14,177				
Total Support services	<u>167,750</u>	<u>263,032</u>	64%	234,343	89%
Total Direct Training	<u>736,873</u>	<u>1,384,865</u>	53%	1,001,281	72%
Total Expenditures	<u><u>1,349,955</u></u>	<u><u>2,388,848</u></u>	57%	<u><u>1,842,723</u></u>	77%

30 - Grant/Adams

7-1-23 thru 3-31-24	Total	Budget	Expenditure Rate	Obligation thru 6/30/2024	Obligation Rate
Expenditures					
Training related					
Salaries & Benefits	638,452	916,738	70%		
OneStop Operator	26,797	40,000	67%		
Travel	11,765	6,813	173%		
Miscellaneous	34,390	61,527	56%		
Supplies	15,576	43,567	36%		
Equipment	11,197	20,000	56%		
Facilities	20,917	64,529	32%		
Communication	5,492	10,430	53%		
Training	3,021	5,000	60%		
Total Training Related	767,608	1,168,604	66%	1,045,483	89%
Direct Training					
Incumbent Worker	6,750	60,000	11%	11,809	20%
On the Job Training	43,093	101,400	42%	58,620	58%
Participant Wages	106,674	193,866	55%	131,208	68%
Institutional Training	203,688	299,840	68%	253,398	85%
Basic Skills Training	106,372	148,020	72%	141,830	96%
Computer Basics	34,494	72,001	48%	45,992	64%
Support services					
GED Fees	1,040				
Prevoc Other	387				
Incentives	66,250				
Housing	11,945				
Transportation	12,225				
Car Repair	2,888				
Participant	149				
Supportive	6,805				
Total Support	101,689	275,402	37%	157,502	57%
Total Direct Training	602,761	1,150,529	52%	800,359	70%
Total Expenditures	1,370,369	2,319,133	59%	1,845,842	80%

50 - Okanogan

7-1-23 thru 3-31-24	Total	Budget Mod 1	Expenditure Rate	Obligation thru 6/30/2024	Obligation Rate
Expenditures					
OneStop Operator	20,098	30,000	67%		
Subrecipient Program	317,447	465,165	68%		
Subrecipient Indirect	47,905	98,720	49%		
Total Training related	<u>385,449</u>	<u>593,885</u>	65%	523,835	88%
Direct Training					
Incumbent Worker Training	0	39,000	0%	16,894	43%
On the Job Training	11,241	57,000	20%	19,178	34%
Participant Wages	16,702	37,932	44%	16,855	44%
Institutional Training	43,982	131,200	34%	66,099	50%
Basic Skills Training	114,994	174,978	66%	153,325	88%
Computer Skills Training	9,981	40,821	24%	15,376	38%
Support services					
GED Fees	180				
Prevoc Other	1,019				
Incentives	3,550				
Housing	2,372				
Transportation	2,418				
Supportive Services Other	4,839				
Total Support services	<u>14,378</u>	<u>76,583</u>	19%	<u>35,987</u>	47%
Total Direct Training	<u>211,278</u>	<u>557,514</u>	38%	<u>323,714</u>	58%
Total Expenditures	<u><u>596,727</u></u>	<u><u>1,151,399</u></u>	52%	<u><u>847,548</u></u>	74%