East Cascades WORKS
Connecting Talent To Opportunity

Executive Committee Meeting Minutes

Date: January 13, 2025
Time: 12:30-1:30 pm
Location: Virtual via Zoom or Phone

Board attendees: K'Lynn Lane, David Burger, Laurie Chesley
Staff/guest attendees: Heather Ficht, Jessica Fitzpatrick, Teresa Cummings-Weir, Matthew Gorman, Nickelle Haffey

Meeting called to order at 12:31 pm.

Time	Topic	Presenter

12:30 pm **Consent Agenda** **K'Lynn Lane, Chair**

- Check-in: everyone shared fun games they like to play with friends and family.
- Minutes from December 2024 Executive Committee Meeting – *vote required*
    - Laurie moved to approve the minutes as presented; Dave seconded. Motion passed unanimously.

12:45 pm **Strategic Plan Update** **Heather Ficht, Staff**

- Heather shared updates from the subcommittee working on refining our strategic plan.
    - A major challenge is that the plan focuses entirely on the end-user customer. Dave Baiocchi has helped brainstorm ways to make it more about our organization by including priorities around our funding, education, and outreach work. Ultimately, we want to merge and clarify the adult and youth goals, and add a priority focused on education and outreach, fundraising, and communication.
    - Updates will be brought to the board meeting. The goal is to re-approve the plan, but we recognize the need for thoughtful conversations first.
- Heather extended an invitation for other members to join the strategic plan subcommittee.

1:00 pm **January 2025 Board Meeting Agenda** **Heather Ficht, Staff**

- Heather shared the draft January 2025 board meeting agenda and asked for feedback.
    - Based on a request from October's meeting, Teresa (or someone from her team) will share a success story at each board meeting.

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  - Iris and Doug, OWP contractors from Equity Action Partners, will talk about the upcoming legislative session. We need to collect more logos to promote the bills we support. Unfortunately, we're currently missing support from most of our board.
  - When Nickelle and Kristyn present on social media and communications, they will be introducing a competition with prizes to encourage board members to engage.
  - Heather will ask Dave Baiocchi to lead the strategic plan conversation.
  - If time, K'Lynn will share the childcare toolkit she has worked on.
- Dave wanted to clarify the board meeting location in the Central subregion. Heather and Nickelle answered that it will be held in Room 116 at COCC's Coats Campus Center. This information is also embedded in the meeting invite (need to open it up to view).

1:10 pm Legislative Asks Heather Ficht, Staff

- Heather asked if Dave's organization, UA Local 290, could provide their support.
  - Dave responded that yes, they can give a motion to approve support; however, they cannot provide funding. Heather clarified that the ask is not for money, just support.
- Heather shared news that that Oregon is down $4 million in the estimated allocation of WIOA funds; the combined state allocation is $30 million (see TEN No. 17-24). Coupled with the loss of prosperity programs, it looks like we are facing a hard year where tough decisions will need to be made concerning our budget.
- Heather shared a couple of statewide funding opportunities, including a clean tech bill that would support incumbent worker and regular workforce training; resources for people in the wastewater management industry; and the creation of a statewide scholarship pool that would enable us to support recruitment, training, and supportive services. Heather noted that one challenge is our need to pay for people; we can't provide training without having a human being to help each jobseeker through the process.
- Our legislative support requests will be discussed in more detail at the full board meeting next week.
- K'Lynn asked which things are most likely to be impacted by a budget shortfall.
  - Heather replied that those estimates will be done in February, but we are currently communicating to the field the need to be conservative, focus on priority of service, and not spend all the money in their contracts. It's possible to have cuts in the field that impact staffing, as people comprise the bulk of what we pay for.
  - Jessica noted that the biggest unknown is the state holdback. Last year the governor held back the maximum amount, and no one knows what has happened with those funds.
  - Heather said she has asked HECC to wait until their behavioral health and construction workgroups complete their final needs reports. She is hopeful we can get some clarity soon.
- Heather shared that she has met with some new and existing representatives who have been very supportive.

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1:25 pm Announcements All

- Matt has been with EC Works for one month now; he shared that he is having a good time (and learning acronyms!). K'Lynn reiterated the strong support system he has around him.
- Dave shared that construction in Central Oregon has been very busy. Some big projects are starting now and in the spring. Apprenticeship numbers are also up.
- Heather shared updates on the COCC presidential search: they are down to three final candidates, and she has been impressed with how well managed the process has been. The board has been highly engaged, and Heather feels confident that a strong candidate will prevail.
- Laurie shared that COCC's State of the College presentation, focused on workforce development, will be livestreamed on Wednesday, January 29 at 9 am.
- K'Lynn announced that a WorkSource resource center opened at the Condon chamber of commerce today, which is very exciting news for rural Oregon! An expansion will be considered in six months if there is a need.
- K'Lynn shared that on December 12, the Workforce Talent and Development Board approved the Continuous Improvement Committee's assessment, which makes bold recommendations for the governor to be a proactive participant in workforce activities.
    - Teresa requested to see the letter, which K'Lynn then shared (see attached).
- Heather shared that leadership in the workforce system (OED, 1B, OWI) met to discuss what happens when state agencies don't agree, and the governor is not an effective arbitrator. Their recommendation is for middle leadership (i.e., people at Teresa's level), who really understand what the field needs, to meet with regional OED managers to develop recommendations that will then go upward to senior leadership. The first test of this strategy will happen at a meeting later this week. Heather believes this will result in better progress than anything else we're doing.
    - K'Lynn requested to hear an update about this meeting at next month's executive committee meeting; Heather agreed to add it to the agenda.
- Dave shared good news that Trenton's Law, which updates laws around electric bicycles, went into effect on January 1.

1:30 pm Adjourn K'Lynn Lane, Chair

- Meeting adjourned at 1:25 pm.

Attachments:

- Draft December 2024 Executive Committee Minutes
- Draft January 2025 Board Meeting Agenda
- Continuous Improvement Committee Assessment

WorkSource Oregon Continuous Improvement Committee

2024 Assessment Report

December 2024

Prepared By: Coraggio Group

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Executive Summary

December 2024

Dear Governor Kotek and Staff,

As you review this report, we encourage you to see it as an invitation to take bold, actionable steps toward building an even stronger workforce system—one that creates a ripple effect of positive change, reaching every corner of our communities. With the strong leadership and alignment already in place, we are uniquely positioned to make meaningful progress. This is a pivotal moment to move the dial forward, transforming ideas into tangible outcomes that empower families, businesses, and communities across our state. Let's seize this opportunity to drive actionable next steps and unlock the full potential of Oregon's workforce.

This assessment follows the Continuous Improvement Committee's commitment to take a LEAN approach to continuous improvement, looking at continuous improvement as a management system – working to create flow through the system by eliminating waste and using a customer focused methodology. A key tool utilized in this assessment is the Plan – Do – Check – Act cycle with a focus on the Check aspect to review improvements made from the initial assessment and the Governance Assessment.

Three key insights have emerged:

1. Some improvements have been made within the system.
2. The system continues to struggle to make large-scale improvements.
3. The Continuous Improvement Committee agrees that a strategic shift needs to happen to drive improvements within the system.

The Continuous Improvement Committee has a shared commitment to act to drive transformative and disruptive change within the system. The Committee has identified the following recommendations to drive this change:

- Create greater alignment between the state workforce board, local workforce boards, and state agency workforce programs and define related authority, roles, and responsibilities.
- Unify and consolidate reporting on system-wide performance metrics.
- Explore reorganizing the state-level WIOA program and funding structures.
- Advocate for and enlist the Governor's support in carrying out the recommendations outlined herein in order to achieve an impactful level of system transformation.

In closing, we urge you to view this report not only as an assessment but as a call to action. The insights and recommendations outlined here present a clear pathway for transformative change within Oregon's workforce system. By establishing a strong Governor mandate, fostering alignment between state and local boards, unifying reporting metrics, and exploring structural reorganizations, we can break through existing barriers and drive the large-scale improvements our system needs. This is a pivotal opportunity to lead with purpose and create a workforce system that truly serves Oregon's communities. We are confident that, under your leadership, we can turn this vision into a reality.

Sincerely,

K'Lynn Lane and Kris Latimer

Continuous Improvement Committee Co-Chairs

Assessment Approach

2024 Assessment

In August 2024, the Continuous Improvement Committee (CIC) engaged with Coraggio Group to conduct the 2024 assessment. The goals of this assessment are to:

- Identify what improvements have been put into place based on the findings and recommendations from the initial assessment and the Governance Assessment.
- Determine if the improvement is having an impact on the customer (Job Seeker and Employer).
- Partner with the CIC to develop a set of recommendations and action steps to continue the improvement cycle.

As you read this report, you may notice that many of the findings and recommendations in this assessment align with the findings and recommended strategies in the Oregon 2024 Talent Assessment. https://www.oregon.gov/workforceboard/data-and-reports/Documents/2024TalentAssessmentFinal5-10-24.pdf

This report provides a continuous improvement assessment. This assessment covers opportunities to improve the system and makes recommendations for further action. This report does not provide an assessment of individual entities within the WorkSource system, although it is based on interviews and data from all constituent agencies and bodies.

The Oregon Employment Department (OED) and the Higher Education Coordinating Commission (HECC) create a program assessment for all WIOA-funded WorkSource programs in the State of Oregon: Workforce Innovation and Opportunity Act Annual Performance Report Narrative (https://www.dol.gov/sites/dolgov/files/ETA/Performance/pdfs/PY2022/OR_PY22 WIOA Statewide Annual Performance Report Narrative.pdf)

This OED and HECC report provides a comprehensive review of the system's effectiveness in serving employers, customer satisfaction, and program enrollment. The report further details the Diversity, Equity, Inclusion, and Accessibility (DEIA) commitments of all state agencies in the WorkSource system.

The detailed project plan can be found in Appendix 1A.

We would like to thank the CIC members who were critical to the process that is the basis for this report.

2024 CIC Membership

Name	Affiliated Organization	Name	Affiliated Organization
K'Lynn Lane CIC Co-Chair	The Ford Family Foundation	Kris Latimer CIC Co-Chair	Knife River Corporation
Todd Nell, CIC Co-Lead Staff	Higher Education Coordinating Commission	Andrew McGough, CIC Co-Lead Staff	Worksystems, the Portland Metro Workforce Development Board
Anne Mersereau	Portland General Electric	Brent Kell	Valley Immediate Care
Craig Pope	Polk County Commissioner	Dave Berger	UA Local 290 Plumbers, Steamfitters and HVAC
Debbie Radie	Boardman Foods	Joe McFerrin	Portland Opportunities Industrialization Center
Paul Brown	Cinder	Paul Diaz	International Association of Bridge Structural & Ironworkers
Robert Westerman	International Brotherhood of Electrical Workers	Susie Calhoun	Confederated Tribes of the Umatilla Indian Reservation
Tara Morrell	Oregon Employment Department	Wendy Popkin	Tualatin Valley/Washington County Visitors Association

We would also like to provide a special thanks to the participants who provided critical input and insights into the process that is the basis for this report.

Name	Affiliated Organization	Name	Affiliated Organization
K'Lynn Lane	The Ford Family Foundation	Kris Latimer CIC Co-Chair	Knife River Corporation
Staci Calkins	Future Ready Oregon	Rachel Adams	Kentucky: Kentucky Education and Labor Cabinet
Sarah Foster	Labor, Workforce and Education Policy Advisor	Stephanie Beckhorn	Michigan: Michigan Department of Labor and Economic Opportunity
Jonathan Scrimenti	Oregon Commission for the Blind	Candi Quintall	Michigan: Michigan Department of Labor and Economic Opportunity
Keith Ozols	Oregon Commission for the Blind	Candi Quintall	Portland Opportunities Industrialization Center
Ryan Kibby	Oregon Department of Human Services	Paul Diaz	International Association of Bridge Structural & Ironworkers
James Pfarrer Katherine Williams	Oregon Department of Human Services	Susie Calhoun	Confederated Tribes of the Umatilla Indian Reservation
Ashley Espinoza Donna Lewelling Julia Steinberger Kurt Tackman Tara Morrell	Oregon Employment Department	Adam Leonard	Texas: Texas Workforce Commission

Background Data Review and Analysis

Coraggio Group reviewed background documents provided by key partners. The background documents reviewed included:

- Applicable federal and state statutes and regulations.
- Operating Standards and associated training documents.
- Customer satisfaction surveys and results.
- Oregon Employment Department (OED) Workforce Modernization project documents.
- Documentation of Future Ready Oregon and Q2 Workforce Benefits Navigator Performance Reports for each Local Workforce Development Board (LWDB).
- May 2023 WorkSource Oregon (WSO) System definition.
- 2021 Initial CIC Assessment.
- 2022 Governance Assessment.
- Summary of Workforce and Talent Development Board (WTDB) Roles and Responsibilities.
- CIC Implementation Team Recommendations Report.

Interviews and Focus Group

Coraggio Group interviewed 23 partners asking questions on the following topics:

- Intake process.
- iMatch improvements.
- Workforce Innovation and Opportunity Act (WIOA) funding.
- Benefits navigator.
- Understanding of the system.
- Governor/Legislator support.
- Continuous improvement efforts.

The interviews included partners from Oregon Employment Department (OED), Leads of the Workforce System Executive Team (WSET), CIC Chairs, Native American Workforce program, the Commission for the Blind, Oregon Department of Human Services (ODHS), Workforce Talent Development Board (WTDB) members and the Governor's Office.

Coraggio also attended a monthly Oregon Workforce Partnership (OWP) meeting and conducted a focus group during that meeting.

Peer Organization Benchmarking

In collaboration with WorkSource Oregon Staff, Coraggio benchmarked Oregon's public workforce system against five (5) states, with a specific focus on governance and accountability. We conducted five (5) interviews with the following state agencies to learn about their state workforce system:

- Colorado Department of Labor and Employment
- Michigan Department of Labor and Economic Opportunity
- Texas Workforce Commission
- Kentucky Education and Labor Cabinet
- CareerSource Florida

Interviews focused on their state workforce systems and the topics discussed included:

- WIOA Title Funding location
- Local, Regional, State Operating Models
- High-Performing State Workforce Boards
- Performance Management and Continuous Improvement
- Streamlining the System
- Role of the Governor and Legislature

The results of this analysis are included within the recommendations.

Developing Findings and Recommendations

With an understanding of the improvements made and the findings from the state benchmarking, the CIC developed a set of key change levers, identified the level of change desired to make improvements to the system and developed recommendations for consideration by the executive branch and legislative decision-makers with oversight over the public workforce system in Oregon. The draft findings and recommendations were shared with the CIC and WTDB whose feedback was incorporated into the final set of findings and recommendations.

Areas of Assessment and Assessment Findings:

Initial Assessment Report Dated December 2021 Near-Term Recommendation: Review and redesign the Job Seeker welcome and intake process, with the goal of identifying different tracks and process steps based on customer need.

- Identify key points in the intake process where a relationship-based / human-centered approach can be enhanced and/or amplified.
- Establish a simple pre-registration process to quickly identify customer requirements and make quick referrals to services needed.
- Resolve the password reset issue, which has resulted in significant frustration for customers.

Recommendation Background:

WSO's main mechanism for service delivery is through American Job Centers (AJCs). Established under the federal Workforce Investment Act (WIA) and reauthorized in the WIOA of 2014, AJCs are designed to provide a full range of assistance to Job Seekers and Employers under one roof. AJCs offer training referrals, career counseling, job listings, and a variety of other employment-related services. In addition, all local areas have additional funding outside of WIOA which allows an even greater menu of services to be offered through centers. Customers can visit a center in person or connect to a center's information and services virtually. In Oregon, the AJC model is branded as WSO, which has developed and articulated its own Mission, Vision, and Values statements to speak on behalf of the broader workforce system.

During the initial assessment, Job Seekers were seeking a more human-centered, relationship-based approach than the current transactional approach.

Assessment Goal:

To determine if the improvements to the Job Seeker welcome and intake process have enhanced the Job Seeker customer experience within the WSO AJCs environment.

Assessment Findings:

For the workforce system to ensure basic foundational services are offered, and standardization on how those services are delivered, the WSO Operational Standards (Standards) were developed as state-level guidance for local areas. These Standards also encourage sustainable efforts to annually assess and continuously improve area standards as the economy and local needs change.

Coraggio reviewed the Revised WSO Standards effective July 9, 2023. As stated in the Standards:

- The services provided through the WSO centers will be customer-centered to ensure value to each customer experience as close to the front of the customer flow as possible and at each point along the continuum of services. There is no required sequence of services in WSO centers.
- In the event a customer is handed off from one staff to another to access a program or service, it is preferred that this "warm handoff" occur prior to the referring staff moving on to assist another customer. In the event this is not possible, the handoff must occur in-person, via phone, virtually or email, and no later than the end of the workday. Staff receiving a communication will acknowledge receipt of the contact and attempt to contact the participant within one working day of the contact. All WSO centers will ensure adequate staff coverage to greet customers in a timely manner.
- All customers entering a WSO center will be greeted and screened for priority of service. Staff will engage customers to adequately understand the reason for a customer's visit to the center.
- After initial greeting, and listening to the customer needs, staff will inform the customer on available center services as they relate to their articulated goals and assist them in navigating center resources. This may include navigation of center resources, a referral to a partner agency, or queuing for a customized one-on-one conversation with the next available staff or to schedule a more convenient time for the customer (either in-person or virtually).
- During a one-on-one appointment, staff will review, assist with, or conduct basic registration requirements; provide additional information about services related to a customer's identified goals; and provide guidance on next steps based on a customer's needs, interests, and goals. During and after a one-on-one staff are required to identify, articulate, and document a customer's next steps.
- Each time a customer engages in the next step in their journey, staff are required to confirm, and update required registration elements as needed.

To determine if the Standards are having an impact on the customer experience, Coraggio also interviewed Local Workforce Development Board (LWDB) representatives and reviewed customer satisfaction survey results:

- Customer satisfaction information is captured and gathered through OED's Workforce System Performance Measures which is an interactive dashboard of Job Seeker and Employer customer satisfaction.
- Customer satisfaction is measured by overall quality of services and the likelihood of recommending the services to others.
- Overall Quality is measured as the percentage of survey respondents who rated the quality of services as excellent or good.
- The Likely to Recommend measure is the percentage of survey respondents who said they would be very likely or somewhat likely to recommend the services they received to others.
- Data is consolidated across all areas and by local workforce area. Interactive graphs also capture trends over the last four (4) years.

Looking to other state workforce systems, Coraggio found:

- States with centralized workforce systems, like Texas, have an easier time tracking and aligning on data and performance metrics.
- States track different performance metrics; however, the most important reporting metrics are the percentage of individuals employed, employer/employee satisfaction, time to hire, and incremental wage gains.
- Even in states with centralized data tracking, like Texas, it is difficult to get a statistically significant response to jobseeker satisfaction.

Upon our review, Coraggio identified that the Standards were adapted to incorporate the findings from the initial assessment. Coraggio has also identified that the high-level guidance provided in the Standards sets expectations for the customer experience. However, at the time of this report, the Standards had not been rolled out to all the WorkSource Oregon centers. Training and adoptions of the Standards was expected in fall of 2024.

Given that the revised Standards are not yet fully implemented, we are unable to determine if the implementation of the standards has had a significant impact on the customer experience. If the customer satisfaction survey information is routinely reviewed and acted upon by the LWDBs, the customer satisfaction survey information would provide an indication if the implementation of the Standards are having an impact on the customer experience.

Initial Assessment Report Dated December 2021 Near Term Recommendation: Evaluate the core purpose and functionality of iMatchSkills as a job matching and capability assessment tool to inform, and potentially expedite, OED's planned modernization effort.

- Evaluate how iMatchSkills is used in the provision of services and opportunities to use it differently.
- Evaluate use and utility of data collection efforts through iMatchSkills with a human-centered, relationship-based equity lens.
- Determine its value proposition relative to other 3rd party platforms such as Indeed, LinkedIn, Glassdoor, etc.
- Explore partnership opportunities between iMatchSkills and 3rd partner platforms, such as Indeed, to ensure that these platforms are linked and matching job opportunities with job seekers in the WSO system.

Recommendation Background:

iMatchSkills is the primary platform used to connect Job Seekers with job opportunities. Job Seekers and Employers are both engaged with the system to identify a match of Job Seeker skills and experience with Employer's needs. During the initial assessment, improved job matching was the top opportunity to improve satisfaction of WSO with Job Seekers. Job Seekers reported more often using private job matching sites to find employment due to ease of use.
From the initial assessment, Employers were particularly unsatisfied with this system and expressed concern, indicating that simplified accessibility and navigation of WSO services, more specifically the iMatch experience, is an important opportunity to increase satisfaction of WSO services. This included improving all of WSO's web-based and digital systems (e.g., iTrac and iMatch).

Assessment Goal:

To determine if and how the utility of iMatchSkills has been assessed in the OED Modernization efforts or independent of the OED Modernization efforts.

Assessment Findings:

Coraggio interviewed OED staff and reviewed the OED Workforce Modernization project documents. We found:

- Process and system improvements have been included in OED's Workforce Modernization program.
- The business case for Workforce Modernization is clear and funding is in place to support OED's Workforce Modernization Program.
- The timeline for implementation of system improvements is scheduled for 2026 into 2027.

Looking to other state workforce systems, Coraggio found:

- States identified the evolutions in AI technology as the biggest opportunity for changing the way the workforce system helps match job seekers to employers.

Coraggio interviewed OED's Business Services team who partners with Employers by providing local recruiters at no cost. The Business Services team augments iMatch with LinkedIn as a tool to help recruit and fill positions in partnership with Employers.

Upon our review, Coraggio has confirmed that the iMatch improvements are considered as part of OED's Workforce Modernization efforts. However, the timing of these efforts is not having an immediate impact on improvements to the customer experience. Continued information flow between the WTDB, the CIC, OWP and OED's Workforce Modernization efforts is needed to ensure that customer requirements are included in the development of the new system(s).

Where utilized and known, OED's Business Services team has a locally focused staff and has been successful in implementing a relationship-oriented, human-centered approach for Employers.

Initial Assessment Report Dated December 2021 Near Term Recommendation: Explore a single point of contact (e.g., Navigator role) through the WSO system (e.g., one stop centers, through community-based organizations and/or accessible through an online intake process) to efficiently guide next steps that match the unique needs of each customer.

- Initially when engaging the system, they have an unbiased, autonomous single point of contact that provides ongoing continuity throughout the process.
- Knowledgeable of all services offered and customer centric (e.g., meeting the customer where they are and providing helpful, customer service).
- Aware of cultural differences and the lived experiences of priority customers and apply that awareness to how they support and connect with the individual customer.
- Explore the feasibility of a shared funding model for the single point of contact.

Recommendation Background:

From the initial assessment, Job Seekers' number one expectation for WorkSource Oregon Centers is for staff to be helpful. Job Seekers commented that they desired to be understood, respected, and looked after and not just a number in a system. While the practical processes of providing information, locating employment opportunities, and training were clearly and obviously viewed as highly important, the need for human helpfulness emerged as the number one future requirement/expectation. Job Seekers requested a personal and consistent connection with WSO Center staff with whom they would be able to connect with more than once and who is knowledgeable, empathetic to, and understanding of their specific circumstances, characteristics, skills, experience, and needs.
System Partners also acknowledged the need for a more flexible and empathetic approach and expressed concern that Job Seekers may drop out of the system due to connection complexity and the process of handing-off customers between people and to different programs or services.

Assessment Goal:

To determine if a single point of contact has been implemented throughout the WSO system and the impact on the customer experience.

Assessment Findings:

Coraggio reviewed:

- Future Ready Oregon Program Update and Annual Report.
- LWDBs Q2 Quarterly Performance Reporting for the Workforce Benefits Navigator program.

Coraggio also interviewed staff that manage the Workforce Benefits Navigator grant program.
From our review and interview:

- Future Ready Oregon provided $10M in grants to LWDBs for workforce benefits navigators. The resources were received by LWDBs 2024.

- Because of contractual delays, many LWDBs are still in the process of developing and implementing aspects of the program, which may include mobile units, benefits navigators, expanding existing navigator services, and enhanced partnerships with local organizations.
- Data for number of individuals accessing and receiving services through this program was not available given that the program was still in development.
- Most LWDBs are linking their benefit navigator activities to their strategic goals.
- LWDBs are required to submit quarterly performance reports.

Looking to other state workforce systems, Coraggio found:

- Shifts in software vendors have negatively affected the jobseeker intake process in Florida and Texas.
- Colorado and Texas have increased efforts to create a human-centered intake process but still struggle due to the invasiveness of the questions that must be answered in order to assess service eligibility.
- Kentucky is one of only three states that have a case management system to assist jobseekers through the intake process.

Upon our review, Coraggio has confirmed that the intent of benefits navigators (to efficiently guide next steps that match the unique needs of each customer) is funded and in development within each LWDB. Each LWDB is tailoring the approach to best serve their local customer needs. However, the long-term funding for the navigator program is uncertain and lessons learned across the system may not be shared to ensure the spreading and scaling of systems change.

Initial Assessment Report Dated December 2021 Near Term Recommendation: Clarify and communicate the current WSO accountability and evaluation system.

- Define and communicate the roles and responsibilities of each system partner, document existing decision-making authority, and communicate current accountability structure.
- Align and resolve duplication of roles, responsibilities, and processes between the CIC, the WSET, and the One-Stop Center Continuous Improvement Team.
- Ensure relevant committees and boards have the appropriate representation of partners and are reflective of the priority communities WSO is seeking to serve.

Recommendation Background:

From the initial assessment, it was identified that WSO lacked a shared governance model with a clear accountability to create a culture of continuous improvement. System partners identified a lack of understanding of the shared goals, metrics, and vision for WSO.
In addition, participants reported a lack of leadership or clear governing body that is truly accountable for implementing system-wide change. The lack of leadership accountability hindered WSO's ability to implement solutions. Participants also agreed that there was a need for evidence-based decision making and data informed analysis of return-on-investment (ROI) and outcomes.

Assessment Goal:

To determine if the roles, responsibilities, and processes between the CIC, the WSET, and the One-Stop Center Continuous Improvement Team have been clarified and that they have representation and are reflective of priority communities WSO is seeking to serve.

Assessment Findings:

In December 2022, the CIC issued the Governance Assessment which identified the funding / resources, decision-making, and accountability of the system. The assessment also included a national best practice review and state benchmarking with a specific focus on funding / resources, decision-making, and accountability. The assessment was completed and identified governance improvement opportunities.

Four pillars were identified to improve governance, decision making, and accountability in the system:

1. A clear and shared definition of the system.
2. Committed leadership from the Governor and Executive Branch.
3. A strong, educated, empowered, and accountable state board.
4. State agency alignment and integration.

The progress in implementing improvements in each of these pillars is detailed in the following set of recommendations.

Looking to other state workforce systems, Coraggio found:

- States with a decentralized system, such as Colorado, struggle to implement continuous improvement practices; however, they have found success in creating incentives for local boards to implement improvements and reporting not required by law.
- Although operating in a decentralized system, Michigan implemented a standard service delivery model so that employers have similar offerings and expectations across different regions.
- States like Michigan that have a statewide workforce plan have greater clarity articulating shared metrics and aligning priorities between local workforce boards.

Governance Assessment Report Dated December 2022 Near-Term Recommendation:
A Clear and Shared Definition of the System

- Utilizing the recent current state mapping of WSO, WTDB convened partners to establish a clear definition of the WSO system, including an inventory of all federal, state, and local resource flows.
- Educate and engage the Governor, Legislators, and Agency Directors on the definition of the system, who the system serves, and the impact its programs have on customers (Job Seekers and Employers).

Recommendation Background:

From the Governance Assessment, it was identified that WSO was not well defined or understood by stakeholders and customers, contributing to a lack of accountability and ability to effectively focus on continuous improvement. The complexity of the system - government levels, state vs local service delivery responsibilities, and a multitude of funding and reporting relationships - presents a challenge for navigation, alignment, and cohesiveness. A lack of common understanding of the organizations, programs, and services that comprise WSO makes it difficult to establish a shared vision, assess success, and govern participating organizations. Given the magnitude of system funding and the needs of system customers (Job Seekers and Employers), strong direction, transparency, accountability, and coordination was needed to ensure the funds are used to best drive desired outcomes and impact the state's economy.

Assessment Goal:

To determine if there is a clear definition of the system, that those within the system have a clear understanding of the system and that customers understand how the system works and meets their needs.

Assessment Findings:

In May 2023, the WTBD in partnership with the CIC and LWDBs approved a definition of the WSO system. The system definition includes 13 primary programs and resources and calls for strengthening the alignment of workforce programs through strategic planning, common performance accountability measures, and shared governance.

During Coraggio's interviews, we asked:

- How the definition of the system has improved the way their organization understands its role in the system.
- What efforts have been made to date to educate and engage the Governor, Legislators, and Agency Directors on the definition of the system, who the system serves, and the impact its programs have on customers (Job Seekers and Employers).

Looking to other state workforce systems, Coraggio found:

- Workforce needs can be better aligned with business needs and economic development priorities when it is centered through comprehensive Workforce Economic Development Plans, as is the case in Michigan.
- Decentralized workforce systems, such as Florida, have cohesive branding across different programs to help create greater awareness and cohesion for jobseekers.

Upon our review, Coraggio has confirmed that the WSO system has been clearly defined and for those that know about the system definition, the definition has helped to provide guidance around the system and their role within the system. However, many respondents either did not know about the system definition and / or did not find it practically applicable to their understanding of their role within the system. Many respondents were not aware of any efforts made to date to educate and engage the Governor, Legislators, and Agency Directors on the definition of the system, who the system serves, and the impact its programs have on customers (Job Seekers and Employers).

Governance Assessment Report Dated December 2022 Near Term Recommendation:
Committed Leadership from the Governor & Executive Branch

- Partner with the Governor to establish the mandate (leadership, ownership, accountability) for WSO to serve as an important economic driver to facilitate transformation.
- Partner with the Governor to delegate and empower the WTDB with decision-making authority to align system resources and hold partners accountable.

Recommendation Background:

From the Governance Assessment, it was identified that the role and impact of WSO - compared to the state's broader workforce, education, and economic development systems - was not generally viewed by state leaders as a critical driver in achieving desired economic outcomes. At the time of the assessment, neither the WTDB's Strategic Plan nor WSO's federally required WIOA State Plan effectively serve as a long-term strategy or vision for the system.
At the time of the assessment, the Governor had not delegated to the WTDB the authority to set system-wide success metrics beyond those prescribed by federal WIOA agencies. Also, the Governor had not delegated decision-making authority over WSO to the WTDB, hindering the ability to efficiently make informed improvements to the system.

Assessment Goal:

To determine if there is a clear mandate from the Governor for WSO to serve as an important economic driver and / or if decision making has been delegated to the WTDB.

Assessment Findings:

During Coraggio's interviews we asked:

- How they would rate the engagement level of the Governor, Legislators and Agency Directors.
- What did they believe is the mandate from the Governor for WSO to serve as an important economic driver to facilitate transformation.

Through our conversations we found:

- Participants agreed that they would rate the engagement level of the Governor and Legislators as low yet found that the Agency Directors had a higher level of engagement in the system.
- Participants agreed that there is not a clear mandate from the Governor for WSO to serve as an important economic driver to facilitate transformation.

Looking to other state workforce systems, Coraggio found:

- Michigan and Kentucky have strong Executive and Legislative support and share key talking points that echo top priorities.
- States like Colorado that have decentralized systems struggle to engage and align with the Governor's priorities.

Upon our review, Coraggio has confirmed that limited progress has been made on gaining commitment / mandate for system improvements from the Governor and Legislators. In addition, no progress has been made to delegate authority to the WTDB to set system-wide success metrics beyond those prescribed by federal WIOA agencies.

Governance Assessment Report Dated December 2022 Near Term Recommendation:
A strong, educated, empowered, and accountable state board.

- Invest in performance management infrastructure that incentivizes continuous improvement and efforts at the local level that can be spread/scaled across the system.

Recommendation Background:

From the Governance Assessment, it was identified that WSO lacks clear system decision-maker and the resources and formal structures for robust continuous improvement. The WTDB and the CIC currently lack political influence compared to other workforce development and post-secondary education stakeholders in the state. System accountability is mostly articulated by state agencies reporting performance outcomes to federal WIOA funding agencies, limiting the role and impact of the system's federally mandated governing body, the WTDB.

The Governance Assessment also identified that Oregon's commitment to continuous improvement was new and did not have a fully established formal process for piloting and implementing improvements across the system. In addition, at the time of the Governance Assessment, there was no dedicated staff within the system focused on continuous improvement or system innovations.

Assessment Goal:

To determine if there are system wide performance measures and incentives in place and their effectiveness in improving the system at the local level. To determine if improvements locally have been spread / scaled more broadly across the system.

Assessment Findings:

- Related to system wide performance measures, Coraggio reviewed the Summary of WTDB Roles and Responsibilities which captures the statutory responsibilities of the WTDB. From this review we found that the WTDB is accountable to:
- Develop and continuously improve the one-stop delivery system in local areas including providing assistance to LWDBs, one-stop operators, one stop partners, and providers.
- Develop and update comprehensive State performance and accountability measures to assess core program effectiveness.

In order to determine if improvements locally have been spread / scaled more broadly across the system, Coraggio reviewed the CIC Implementation Team Recommendations Report developed by the Continuous Improvement Committee Implementation Team dated December 2022. The Continuous Improvement Committee Implementation Team was made up of leaders from all nine workforce areas in the state to include OED Managers, and Program Directors from the LWDBs, each having a direct connection to frontline work happening in the WSO system. The team is facilitated by a neutral third-party, who also serves as the One-Stop Operator (OSO) in multiple workforce areas. The report details each of the recommendations and pilot opportunities for improvement.

Upon our review, Coraggio has confirmed that limited progress has been made on identifying or implementing system-wide performance measures. We were not able to identify any incentives in place or their effectiveness in improving the system at the local level. We were also unable to determine if improvements locally have been spread / scaled more broadly across the system.

Governance Assessment Report Dated December 2022 Near Term Recommendation:
State Agency Alignment

- Review the membership of the WTDB, CIC, and WSET to ensure the right system knowledge, perspectives, and organizational representation.
- Clearly define the distinct roles and responsibilities of the WTDB, CIC, and WSET and map how they will interface with each other.

Recommendation Background:

From the Governance Assessment, it was identified that the various entities that make up WorkSource Oregon are siloed in their approach and lack integration of service delivery, resulting in a system that is not positioned to leverage resources for collective impact. Because of its lack of structural alignment - most notably WIOA Titles spread across multiple state agencies - WSO operates as a series of programs vs. a unified system with a clear vision. While the decentralized nature of WSO allows for individual service delivery organizations to meet the specific needs of their customers, oversight of the system, understanding system-wide impacts, and spreading/scaling improvements is a challenge.

Assessment Goal:

To determine the impact of braided funding / resource integration efforts. To determine if consolidation of funding would have a positive impact on the operations of the system and the customer experience.

Assessment Findings:

During Coraggio's interviews we asked about:

- Opportunities for greater collaboration / integration in funding.
- Success stories for any braided funding efforts.
- Barriers (real or perceived) in having a WIOA funding model that is disbursed amongst the various state agencies.
- Advantages of the current disbursed funding model.

Through our conversations we found:

- Participants agreed that there may be greater collaboration opportunities to braid funds across programs.
- Success stories of braided funding efforts were focused on an individual customer need vs. system wide braided funding opportunities.
- Participants agreed that the current funding model is focused on delivery of the specific WIOA title obligations and not integrated in service to the needs of the customer.

Looking to other state workforce systems, Coraggio found:

- Colorado and Florida can pursue additional funding through philanthropic dollars and have increased their ability to provide services with the additional funding.
- Colorado and Michigan increased the efficiency of their decentralized system by reducing the number of local workforce boards.

Upon our review, Coraggio has confirmed that limited progress has been made on braiding / integrating funding. WSO continues to operate as a series of programs vs. a unified system with a clear vision.

Recommendations

Recommendations:

In September and October 2024, the CIC met to discuss:

- The initial findings from the data review, interviews and focus group.
- Learnings from state benchmarking.
- The level of change needed for key change levers to drive system improvements.
- Recommendations for implementation.

In November 2024, subgroups of the CIC met to develop implementation action plans for each recommendation. The action plans answered the following questions:

- What are the specific action steps needed to implement?
- Who is the owner of each action step?
- What is the estimated timing for each action step?

Each of the system change levers have identified the desired level of change needed for system improvement. The levels of change were defined as:

- Incremental: Do what we already do but do it better.
- Transformational: Change our goals, requiring us to change our assumptions and learn a new set of skills.
- Disruptive: Change our goals and vision, putting existing assets at risk to better serve our customers.

The change levers identified include:

- Customer Experience: Improvement opportunities focused on the activities that enhance value to the customers.
- Performance Accountability: Improvement opportunities focused on measuring the performance of the system and driving accountability for system changes.
- System Structure: Improvement opportunities focused on how the system flows in service to the customers.
- Policies Governing the System: Improvement opportunities focused on establishing the expectations and guardrails of the system.

The CIC used the following decision-making criteria to guide their prioritization decisions:

- The recommendation is foundational to all other recommendations.
- The recommendation is in-flight and yet requires CIC oversight to ensure it meets the needs of customers.
- The recommendation is a quick win, or an easy lift and it will create momentum to systems change.
- The recommendation fits within the CIC's role and responsibilities and the CIC has a strong ability to influence and control.
- The recommendation aligns with the priorities of other key actors in the system.

The four recommendations that the CIC will be implementing over the near term are:

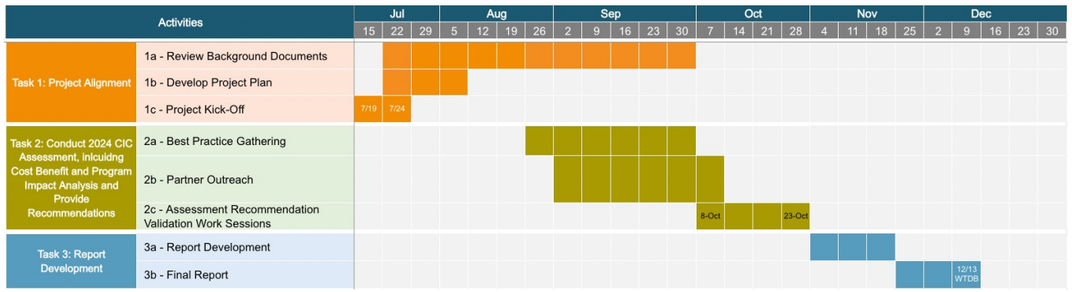
Systems Change Improvement Lever	Level of Transformation Needed	Recommendation	Context
System Structure	Transformational	Create greater alignment between the state workforce board, local workforce boards, and state agency workforce programs and define related authority, roles, and responsibilities.	Better, clearer alignment between the WTDB and LWDBs offer opportunities to manage changes to the WSO system and improve results.
Performance Accountability	Transformational	Unify and consolidate reporting on system-wide performance metrics.	Without clearly aligned and system wide performance metrics, the evaluation of system performance is incomplete.
System Structure	Disruptive	Explore reorganizing the state-level WIOA program and funding structures.	State benchmarking has indicated that states that have more closely aligned funding streams have greater opportunities for driving transformational and disruptive systems change.
Policies Governing the System	Disruptive	Advocate for and enlist the Governor's support in carrying out the recommendations outlined herein, in order to achieve an impactful level of system transformation.	A stronger mandate from the Governor regarding the level of transformation expected within the WSO system will enhance the state and local levers of accountability over the WSO system.

Subgroups of the CIC met in November 2024 to develop detailed action plans which include action steps, timelines and owners for each recommendation to further detail the steps for implementation. The details of the action plans are included in Appendix 1B.

Appendices

Appendix 1A: Project Timeline

To establish and maintain positive momentum and transparency from start to finish, Coraggio Group organized an approach to this project within a three-phase framework of Get Clear, Get Focused, and Get Moving.



Appendix 1B: Project Background and Context

Committee Charge & Purpose:

With the passing of Senate Bill 623 during the 2021 Legislative Session, Oregon's Workforce and Talent Development Board (WTDB) and Local Workforce Development Boards (LWDBs) collaborated to create the Continuous Improvement Committee (CIC). It was created by the WTDB in consultation with state agencies and local workforce boards to assess the effectiveness of Oregon's public workforce development system, or WorkSource Oregon (WSO) and local workforce boards and agencies. WSO is a system comprised of public and private partners who work together to respond to workforce challenges faced by individuals and businesses across Oregon.

The purpose of the Committee is to:

- Complete a continuous improvement assessment of WSO every even-numbered year, with an initial baseline assessment conducted in 2021.
- Ensure the assessment is jointly supported and participated in by all WSO partners.
- Consult with Local One-Stop Operators and align assessments with center certification requirements and State monitoring efforts.

In addition to management and oversight of the comprehensive assessment, the CIC also serves as the coordinating entity for all evaluative materials related to programs delivered through the WSO system.

Legislative Background and Timeline

In 2007, Oregon set a goal for integrated service delivery within WSO. This goal would involve co-location of multiple partners within WSO and adoption of Employers as primary WSO customers, in addition to Job Seekers.

In 2013, Governor Kitzhaber issued Executive Order No. 13-08, which strengthened roles and responsibilities for LWDBs; charged state agencies that administer workforce programs to align themselves in light of reduced resources and a changing economy; and designated the Oregon Workforce Investment Board, now WTDB, as an independent advisory body to the Governor to ensure progress and accountability at both the state and local levels.

The Workforce Innovation and Opportunity Act (WIOA) was signed into law in July 2014. This legislation, in addition to Executive Order No. 13-08 and related efforts in Oregon, resulted in a renewed vigor around workforce system redesign. The Oregon Workforce Partnership (OWP), in partnership with the Oregon Employment Department (OED) and the Higher Education Coordination Commission (HECC) Office of Workforce Investment (OWI), charted a project to establish a statewide framework for consistent workforce service delivery throughout Oregon.

In 2017, as part of continued efforts to implement WIOA, the Workforce System Executive Team (WSET) and the WTDB adopted the WSO Standards as a system-wide expectation for service delivery. As a result, partners came together to further integrate Oregon Department of Human Services (ODHS) Vocational Rehabilitation and Self-Sufficiency employment and training programs, Oregon Commission for the Blind and Adult Basic Education funded through WIOA title II. The standards are based on the premise that partners will continually work together to improve the system, engage new partners, and better serve Oregon job seekers, existing workers, and businesses.
In 2021, Senate Bill 623 was established and directed the WTDB to establish the CIC to assess effectiveness of Oregon's public workforce development system. The WTDB, through the HECC, working on behalf of the CIC, was charged with completing an initial assessment of the WSO system as outlined in Senate Bill 623A.

Previous Assessments

In 2021, the CIC completed an initial assessment of WSO to, in part, establish a baseline for continuous improvement. The initial assessment focused on:

- Identifying service and resource gaps that may impede the WSO system's effectiveness in serving those most impacted by COVID-19.
- Identifying ways to improve the user experience and increasing access and success for disenfranchised communities.
- Improving alignment with agencies and nonprofits that provide culturally specific services and wraparound supports.

Four near-term recommendations emerged from this initial assessment:

1. Review and redesign the Job Seeker welcome and intake process, with the goal of identifying different tracks and process steps based on customer need.
2. Evaluate the core purpose and functionality of iMatchSkills as a job matching and capability assessment tool to inform, and potentially expedite, OED's planned modernization effort.
3. Explore a single point of contact (e.g., Navigator role) through the WSO system to efficiently guide next steps that match each customer's unique needs.
4. Clarify and communicate the current WSO accountability and evaluation system.

Full findings and recommendations associated with the initial assessment can be found here:

WSO Continuous Improvement Committee Initial Assessment Report

In December 2022, in support of the near-term recommendation to clarify and communicate the current WSO accountability and evaluation system, the CIC conducted an in-depth analysis of WSO's governance and accountability structure, with a particular focus on the participating state and local agencies responsible for allocating programmatic resources originating from the federal WIOA Titles and closely related workforce development programs delivered through WSO. The focus of the Governance Assessment included the following activities:

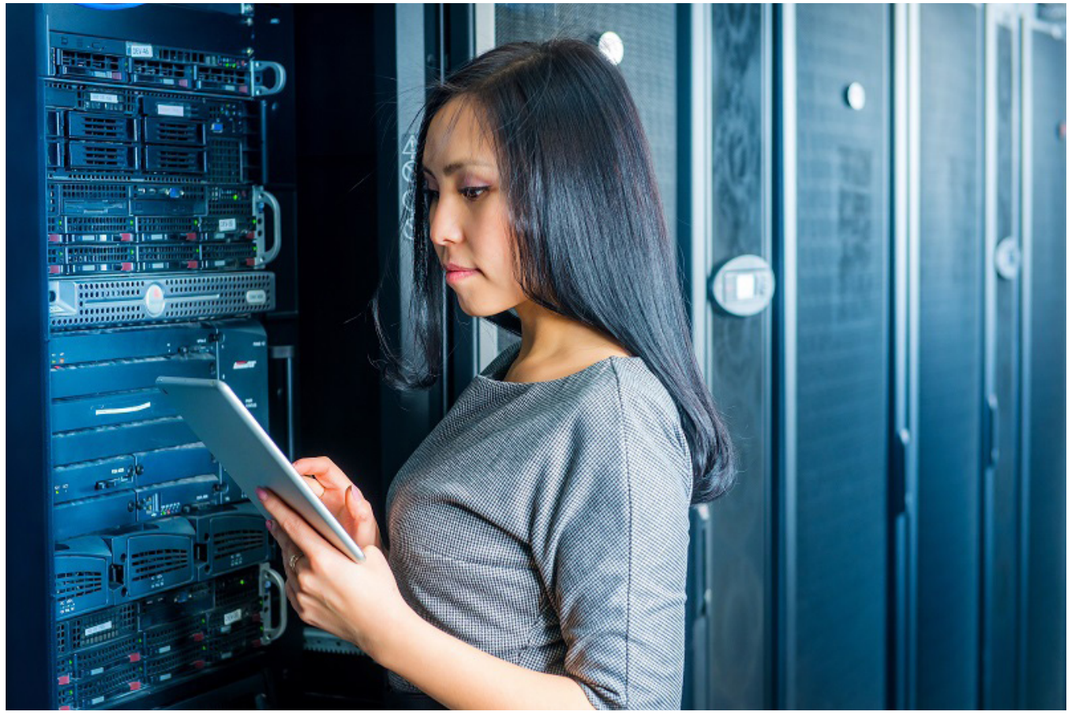
- Map the current state of the WSO governance system with a specific focus on funding/ resources, decision-making, and accountability.
- Conduct a national best practice review with a specific focus on funding/resources, decision-making, and accountability.
- Benchmark with key states with a specific focus on funding/resources, decision-making, and accountability.

In the Governance Assessment four pillars were identified to improve governance, decision making, and accountability in the system:

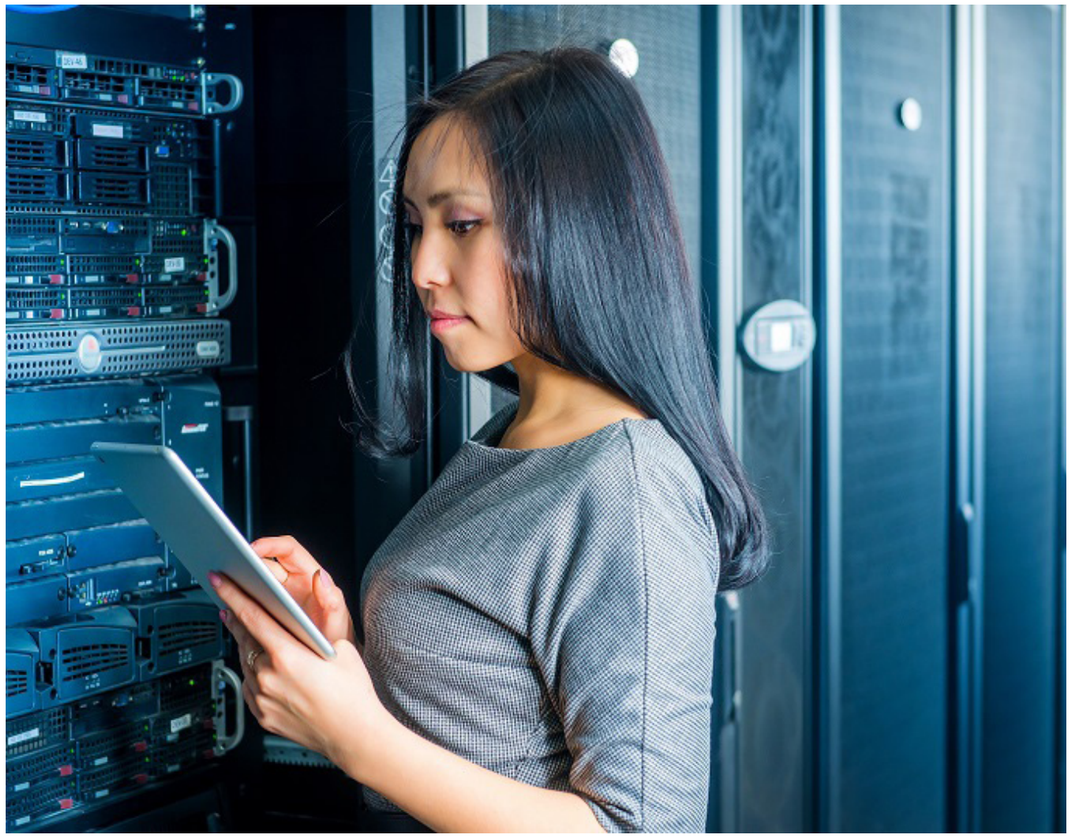
1. A clear and shared definition of the system.
2. Committed leadership from the Governor and Executive Branch.
3. A strong, educated, empowered, and accountable state board.
4. State agency alignment and integration.

Full findings and recommendations associated with the Governance Assessment can be found here:

WSO Continuous Improvement Committee 2022 Governance Assessment Report



Appendix 1C: Action Planning



Draft Recommendation	Context	Action Steps	Point Person/Org.	Completion Timing
Create greater alignment between the state workforce board, local workforce boards, and state agency workforce programs and define related authority, roles, and responsibilities.	Better, clearer alignment between the WTDB and LWDBs offer opportunities to manage changes to the WSO system and improve results.	Clearly define the distinct roles and responsibilities of the WTDB and local boards to map how they will influence and interface with each other (Executive Order as a baseline).	WTDB	1/15/2025
		Clearly define the distinct roles and responsibilities of the CIC, WSET and workforce state agencies to map how they will influence and interface with the system.	WTDB	
		Clarify what is meant by "authority and influence" and define the scope for decision-making, accountability, and compliance.	WTDB	1/15/2025
		Align with local boards on a unified strategic plan and action steps; create a shared understanding (like a checklist) on what kinds of issues should be handled by the WTDB and the accountability mechanisms of the WTDB.	WTDB Executive Committee	2/28/2025
		Define the approach to ensuring the performance of the workforce system and identifying opportunities to spread/ scale improvements across the system.	WTDB Executive Committee	2/28/2025
		Review and revise any documents that define the scope and authority of the WTDB and the local workforce boards (such as the policies, Operational Standards, etc.).	HECC / Todd	3/15/2025
		Partner with the Governor to clarify the state and local system/WTDB's decision-making authority to align system resources and hold partners accountable.	WTDB Chair	3/15/2025
		Decision Point: Does the Governor agree that changes to roles and responsibilities is needed? If so proceed to next action steps		
		Implement the refined roles and responsibilities for the WTDB and LWDBs.	WTDB Executive Committee	3/30/2025
		Implement the refined roles and responsibilities for the CIC, WSET and state agencies.	WTDB Executive Committee	4/30/2025

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Draft Recommendation	Context	Action Steps	Point Person/Org.	Completion Timing
Unify and consolidate reporting on system-wide performance metrics	Without clearly aligned and system wide performance metrics, the evaluation of system performance is incomplete.	Determine who will participate in the action steps and implement change management.	WTDB/Woolsey Group	2/1/2025
		Analyze and assess the various metrics / measures used to assess the system.	HECC / Clay/Woolsey Group	2/15/2025
		Determine which current metrics / measure provide overall system performance information.	HECC / Clay/WTDB Exec Committee/Woolsey Group	2/15/2025
		Identify gaps in metrics / measures.	HECC / Clay/Woolsey Group	2/15/2025
		Meet with states with best practices in data sharing.	HECC / Clay/Woolsey Group	2/15/2025
		Align any existing system performance metrics / measures and any new metrics / measures with state economic development goals.	HECC / Clay/Woolsey Group	2/15/2025
		Determine the frequency / timing of providing the metrics / measure and the approach to discussing and using the data to improve system performance.	HECC / Todd/Woolsey Group/WTDB Exec Committee	3/30/2025
		Create guidance and communication for reporting bodies.	HECC / Todd/Woolsey Group/WTDB Exec Committee	4/30/2025

Draft Recommendation	Context	Action Steps	Point Person/Org.	Completion Timing
Explore reorganizing the state-level WIOA program and funding structures.	State benchmarking has indicated that states that have more closely aligned funding streams have greater opportunities for driving transformational and disruptive systems change.	Meet with key agency leadership and local workforce boards to consider the opportunities and risks of consolidating WIOA funding.	WTDB Chair	3/15/2025
		Establish a WTDB / CIC task force to analyze the opportunities, risks and determine if consolidation of funding is desired. If yes, proceed to below steps.	WTDB Chair	4/15/2025
		Develop a proposed approach to consolidate WIOA funding.	WTDB/OWP	4/30/2025
		Meet with OWP to align on communication and advocacy.	WTDB/OWP	5/10/2025
		Meet with the Governor to provide a recommendation regarding the consolidation of WIOA funding.	WTDB Chair	6/1/2025
		Decision Point: Does the Governor agree with the recommendation to consolidate funding? If so, proceed to carry out the proposed plan.		

Draft Recommendation	Context	Action Steps	Point Person/ Org.	Completion Timing
Advocate for and enlist the Governor's support in carrying out the recommendations outlined herein, in order to achieve an impactful level of system transformation.	Stronger support from the Governor regarding the level of transformation expected within the WSO system will enhance the state and local levers of accountability over the WSO system.	Clearly define how WSO system transformation connects to the Governor's stated priorities. Establish a vision for the future of the system.	HECC / Todd	12/15/2024
		Meet with all local workforce boards get a formal letter of support from each.	OWP/Andrew	12/15-1/31
		Prepare a one-page document that summarizes the recommendations and defines customers and interested parties. Surface challenges while celebrating success.	CIC/Coraggio	12/31/2024
		Meet with Policy Advisors to review recommendations and prepare to meet with the Governor.	Todd/Andrew/Clay	1/15/2025
		Meet with the Governor to share the results of the 2024 assessment, the alignment with the Governor's expectations and gain guidance on the level of WSO system transformation expected.	CIC Members	1/31/2025
		Decision Point: Is there support for more transformative or disruptive systems change? If so proceed to next action steps		
		Establish a WTDB / CIC task force to manage the activities associated with the WSO system transformation.	CIC Co-Chairs	2/15/2025
		Establish a cadence for the WTDB / CIC task force to report back on progress.	CIC Co-Chairs	2/15/2025
		Check / adjust task force activities based on learnings.	CIC Task Force	Ongoing
		Celebrate and storytell success stories from system transformation through a state-wide roadshow.	CIC Members	Ongoing
		Establish yearly touchpoints with Regional Solutions to ensure the smooth flow of information.	Todd/Andrew	Ongoing

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