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 Patty Rose
 Sheila Ruhland
 Ron Thalheimer
 James Walker
 Blaine Wolfe

WDC Business Services Committee Meeting

Agenda
July 27, 2015
8:00 a.m. – 9:30 a.m.
Dave Lawson, Chair

WorkForce Central
3650 S. Cedar St, Tacoma
Classroom 2

- | | | |
|---|---------------|--------|
| 1. Hello / Introductions | Dave Lawson | 10 min |
| 2. Customer Service Presentation (Glenn Dooley, Northwest Etch Technologies) | Andy Wells | 15 min |
| 3. Review Prior Meeting Notes | Dave Lawson | 5 min |
| 4. WIOA Incumbent Worker Training Policy | Holly Watson | 20 min |
| 5. Local Plan | | |
| • Alliance for Quality Career Pathways | Cheri Loiland | 10 min |
| 6. Other Business | | |
| 7. Next Meeting Agenda Items | | |
| • Economic Development Board Presentation | | |
| 8. Thank You/Adjourn | | |

WorkForce Central Staff
 Linda Nguyen, CEO
lnguyen@workforce-central.org

Deborah, Howell, CAO
dhowell@workforce-central.org

Jan Adams, Executive Assistant
jadams@workforce-central.org

WorkForce Central
 3650 S. Cedar St.
 Tacoma, WA 98409
 Phone: 253.254.7335
 Fax: 253.830.5226
www.workforce-central.org

Future Meetings

August 24, 2015 8:00 – 9:30 a.m.
 September 28, 2015 8:00 – 9:30 a.m.
 October 26, 2015 8:00 – 9:30 a.m. (Joint Mtg. w/Adult Services Committee)
 November 23, 2015 8:00 – 9:30 a.m.
 December 28, 2015 8:00 – 9:30 a.m.

Workforce Development Council (WDC) of Tacoma Pierce County

WIOA Committee Membership Planning Document

7-20-15

WDC Business Services Committee

- Committee Chair is member of WDC.
- ✓ Since all of WDC members are required to serve on a WDC Committee, approximately 4-6 members of the committee will be WDC members.
- Vice Chair selected from Committee and must be willing to also serve on Coordinating Committee.

| Representation | Name, Title, Employer, Email, Phone(s) | WDC Member |
|--|--|-------------------|
| Chair of Committee | Dave Lawson, Executive VP, Human Resources Columbia Bank dlawson@columbiabank.com | ✓ |
| Vice Chair | Darci Gibson, Director - Human Potential Partner Services MultiCare Health System darci.gibson@multicare.org | ✓ |
| 1. Economic Development Representative | Bruce Kendall, President and CEO Economic Development Council Tacoma-Pierce County bruce@edbtacomapierce.org | ✓ |
| 2. Business - Aerospace Industry Sector | | |
| 3. Business - Healthcare Industry Sector | Darci Gibson, Director - Human Potential Partner Svcs MultiCare Health System darci.gibson@multicare.org | ✓ |
| 4. Business - Logistics/Transportation Industry | | |
| 5. Business - Military Industry Sector | | |
| 6. Business - Other | Dave Lawson, Executive VP, Human Resources Columbia Bank dlawson@columbiabank.com | ✓ |
| 7. Business - Other | Wayne Nakamura, Claims Manager State Farm Insurance wayne.nakamura.ap5e@statefarm.com | ✓ |
| 8. Business - Small Business | Jeff Lovell, President/Executive Director Automotive Service Association Northwest jeff@asawa.com | |
| 9. Labor Representative or Apprentice JATC Representative | Patty Rose, Secretary/Treasurer Pierce County Central Labor Council pattyrose@harbornet.com | ✓ |
| 10. Labor Representative or Apprentice JATC Representative | Mark Martinez, Executive Secretary Pierce County Bldg & Construction Trades Council piercebctc@earthlink.com | ✓ |
| 11. Chamber Representative | | |
| 12. Minority Business or Minority Chamber Representative | | |
| 13. Pierce County Library System | | |
| 14. WA State Department of Social and Health Services | | |
| 15. WA State Division of Vocational Rehabilitation | Kristine Stolberg (maternity leave until 9/11/15) WA State Division of Vocational Rehabilitation | |
| 16. WA State Employment Security Department | Ione Turner, Career Navigator Employment Security Department iturner@esd.wa.gov | |

Workforce Development Council (WDC) of Tacoma Pierce County
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| 17. Education | Jo Ann Baria, VP of Workforce, Economic and Professional Dev. Pierce College District JBaria@pierce.ctc.edu | |
| 18. Community Based Organization | Possible representative from Courage360 to replace Robin Lester | |
| Workforce Development Council/WorkForce Central Staff | <p>Andy Wells, Workforce Development Director- Business Services 253.254-7845; awells@workforce-central.org</p> <p>Cheri Loiland, Chief WIOA Transition Officer 253.254.7908 ; cloiland@workforce-central.org</p> <p>Debbie Lean, Executive Assistant 253.414.0141; dlean@workforce-central.org</p> | |
| | | |

WDC Adult Services Committee
 & WDC Business Services Committee
 Joint Meeting

NOTES

June 3, 2015

2:30 – 4:30 p.m.

WorkForce Central

3650 S. Cedar St, Tacoma
 Classroom 1

Committee Member Attendees: Robin Baker, Diane Giannobile, Dona Ponepinto, Mike Johnson, Rachel Lewis, Sharon Ness, Stephanie McWilliams, Dave Lawson, Darci Gibson, Jeff Lovell, Wayne Nakamura

WDC Staff Attendees: Linda Nguyen, Deborah Howell, LaTanya Huey, Andy Wells, MaryEllen Laird, Holly Watson, Cheri Loiland, Debbie Lean

Guests: Kim Ward and Kelli Johnston (Tacoma Community College)

| AGENDA | NOTES | ACTION ITEMS |
|--|---|--------------|
| <p>1. Hello/Introductions (Robin Baker & Dave Lawson)</p> | <ul style="list-style-type: none"> • Meeting started at 2:38 p.m. • Roundtable Introductions were made. • Robin thanked the Business Service Committee members for rearranging their schedules to attend this joint meeting. Robin and Dave shared they thought it would be a better discussion about the budget with the two teams operating together and meeting the needs of both. • Need to look at the big picture in terms of the dollars and cents that are assigned to each line item. | |
| <p>2. PY15 Dashboard & PY15/FY16 Budget Deliberations (Linda Nguyen)</p> | <ul style="list-style-type: none"> • Linda explained each of the colored forms in the agenda packet. • The committee needs to focus on the draft budget for the Adult & Dislocated Worker and the Strategic Dashboard Report. • When talking about the budget remember this is only one small element of the system's budget. • The budget has to be approved by the Executive Board and the WDC at its June. • In looking at the Budget as passed out, the formula funding is still projected however, Linda received news today from the State of actual | |

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| | <p>allocations but there is still discourse about whether they used the methodology appropriately to determine local allocations.</p> <ul style="list-style-type: none"> • Projected \$1.7 million for Adult. Actual is \$99,400 less. • Projected \$1.8 million for Dislocated Workers. Actual is \$85,523 more. • Reminder to keep in mind when reviewing the budget to consider the obligations that are set out at the bottom. It has been reorganized for better understanding of old money rolling into the new year. • Linda explained each category on the Dashboard. The Dashboard is set up by investment areas as outlined in the draft budget. • Linda says the way to look at the budget is how much is really going into system work and moving customers into jobs and how much is really working with businesses to get to the talent to fill their jobs. This is really the work of the system. • Robin stated that she would like to see results from some of the training program through the various programs/partnerships that we have in place and how they are doing. Deborah stated she would put together a report. • Linda gave an overview of the various training contracts/partnerships that are set out on the budget under obligations. • Robin asked if everyone was ready to move it forward knowing that it will shift a little with the new numbers that Linda received. The committee recommended that the budget with amendment Linda will be making be moved forward. | <p>Deborah will put together a report for next meeting</p> <p>Amended draft budget and revised dashboard were emailed to committees</p> |
| <p>3. Other Business</p> | <p><u>Eligibility Policy Development – Holly Watson</u></p> <p>Effective July 1, 2015</p> <p>Communicate key provisions and changes authorized by WIOA Based on WIOA and proposed regulations</p> <p>May be amended once final regulations are published</p> <p>Highlights:</p> <p>WFC WIOA Title 1-B Adult Eligibility Determination Policy:</p> <ul style="list-style-type: none"> • Priority of Service must be given to: <ul style="list-style-type: none"> ○ Low-income adults ○ Public assistance recipients and ○ Individuals who are basic skills deficient ○ And for all DOL funded programs, veterans and eligible spouses must | |

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| | <p>be given priority</p> <ul style="list-style-type: none"> ▪ <i>Note: Holly will revise policy to reflect better definitions with regards to the term "covered person" as it relates to veterans and eligible spouses per priority of service for veterans.</i> <ul style="list-style-type: none"> • Other Enrollments: <ul style="list-style-type: none"> ○ Individuals outside of the priority groups may be enrolled on a case-by-case basis with managerial approval ○ Limited to 10% of all adults registered in the current program year <p>WFC WIOA Title 1-B Dislocated Worker Eligibility Determination Policy:</p> <ul style="list-style-type: none"> • U.S. citizen or legally entitled to work • Meet Selective Service Registration • Meet one of the Dislocated Worker categories • <i>And for all DOL funded programs, veterans and eligible spouses must be given priority</i> • Displaced Homemaker <ul style="list-style-type: none"> ○ Has been providing unpaid services to family members in the home; dependent on the income of another family member and is no longer supported by the income of another family member or ○ The dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty or the service-connected death or disability of the member and ○ Is unemployed or underemployed an experiencing difficulty in obtaining or upgrading employment ▪ <i>Note: After discussion, Holly will revise policy to reflect better definition regarding "who qualify for the Dislocated Worker Program" and also revise definitions of the Eligibility Criteria as it relates to military service members.</i> <p>The committee recommended that the policies with amendments Holly will make be moved forward for recommendation by the Coordinating Committee and approval by the WDC. New drafts of transition policies with changes will be emailed to committees by Friday.</p> <p><u>Other:</u></p> | <p>Holly revised policies to reflect better definitions with regards to the term "covered person" as it relates to veterans and eligible spouses per priority of service for veterans.</p> |
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| | <ul style="list-style-type: none"> • The committee agreed that it would be beneficial if the Adult Services and Business Services committees meet jointly on a quarterly basis to review dashboard/budget. <ul style="list-style-type: none"> ○ Adult Services Committee will join the Business Service Committee on October 26th 8:00-9:30am for joint meeting ○ Adult Services Committee - November 4th meeting cancelled • December re-evaluate on whether committees will need to meet every month. • Cheri will contact Georgia Lomax from the Pierce County Library about her availability to be a participant on the Adult Services Committee. • Linda asked if there was anything the committee would like to see or have staff do. <ul style="list-style-type: none"> ○ Dave Lawson: would like to see presentation from the beneficiaries of the system that are getting from us. At the next Business Services meeting he would like this topic to be discussed further. | <p>Cheri will contact Georgia Lomax regarding joining WDC Adult Services committee</p> |
| <p>4. Thank You/Adjourn</p> | <p>4:20 pm</p> | |



Workforce Innovation and Opportunity Act (WIOA) Policy

WFC WIOA TITLE I-B INCUMBENT WORKER TRAINING POLICY

POLICY NUMBER: 1001

EFFECTIVE DATE: X-X-2015

PURPOSE

This policy provides criteria to determine which workers, or groups of workers, are eligible for incumbent worker training services and the cost sharing required for incumbent worker training projects. (WIOA Section 134(d)(4)).

BACKGROUND

Incumbent Worker training is designed to meet the special requirements of an employer (including a group of employers) to retain a skilled workforce or avert the need to lay off employees by assisting the workers in obtaining the skills necessary to retain employment and conducted with a commitment by the employer to retain or avert the layoff of the incumbent worker. An ideal incumbent worker training would be one where a participant acquires new skills allowing him or her to move into a higher skilled and higher paid job within the company, thus allowing the company to hire a job seeker to backfill the incumbent worker's position. Incumbent Worker training must increase both a participant's and a company's competitiveness.

Under Section 134(d)(4) of WIOA, local boards can use up to 20 percent of their adult and dislocated worker funds to provide for the federal share of the cost of providing Incumbent Worker training.

POLICY

Incumbent Worker Eligibility Criteria:

An incumbent worker must be:

1. A U.S. citizen or otherwise legally entitled to work in the U.S.;
2. Age 18 or older;
3. Registered for the Selective Service (males who are 18 or older and born on or after January 1, 1960) unless an exception is justified;
4. Employed;

5. Meet the Fair Standards Act requirements for an employer-employee relationship <http://www.dol.gov/whd>; and
6. Have an established employment history with the employer for six (6) months or more.

Note: Per proposed 20 CFR 680.780, an incumbent worker does not necessarily have to meet the eligibility requirements for career and training services for adults and dislocated workers under this Act.

Note: WIA Title I participants who were enrolled in the WIA prior to July 1, 2015 must be transitioned into WIOA, even if the participant would not otherwise be eligible for WIOA. Additional reassessments are not required to be completed for participants already determined eligible and enrolled under WIA. Furthermore, these participants must be allowed to complete the WIA services specified in their individual employment plan, even if the services are no longer allowable under WIOA. (TEGL 30-14)

Employer Eligibility Criteria:

The following factors must be considered when determining the eligibility of employers to receive the WIOA share of funds to provide training to incumbent workers using either Adult and/or Dislocated Worker formula funds:

1. The characteristics of the incumbent workers to be trained and how they would benefit from retention or advancement. Consideration should be given to employers who propose to train individuals with barriers to employment as defined in WIOA Section 3(24). (See Attachment A);
2. The quality of training. Whenever possible, the training should allow the participant to gain industry-recognized training experience and/or lead to industry-recognized credentials and/ or an increase in wages;
3. The number of participants the employer plans to train or retrain;
4. The wage and benefit levels of participants (before and after training);
5. The occupation(s) for which incumbent worker training is being provided must be in demand;
6. The employer is:
 - a. In an in-demand industry as determined by ESD labor market information; or
 - b. In an in-balance industry as determined by ESD labor market information; or
 - c. In a declining industry, but there are compelling reasons (e.g., evidence of long-term viability of the employer) justifying investment in incumbent worker training.
7. The employer must not have laid off workers within 120 days to relocate to Washington from another state;
8. The employer is current in unemployment insurance and workers' compensation taxes, penalties, and/or interest or related payment plan.

Each of the above factors leading to the approval of an incumbent worker training project with an employer must be documented and placed in the contract file.

Employer Share of Training Costs:

Employers participating in incumbent worker training are required to pay the non-WIOA (non-federal) share of the cost of providing training to their incumbent workers. (WIOA Sections 134(d)(4)(C) and 134(d)(4)(D) and proposed 20 CFR 680.820).

The employer share is based on the size of the workforce (wages paid to the participant while in training can be included as part of that share and the share can be provided as cash or in-kind that is fairly evaluated) as follows:

- At least 10 percent of the cost for employers with 50 or fewer employees
- At least 25 percent of the cost for employers with 51 to 100 employees
- At least 50 percent of the cost for employers with more than 100 employees

Employer cost share contributions must be tracked and documented in the contract file. In addition, the methodologies for determining the value of in-kind contributions must be documented in the contract file and conform to cost sharing requirements at 2 CFR 200. 306.

References:

WIOA Section 3(23)
WIOA Section 134(d)(4)
Proposed 20 CFR 680.780, 680.790 and 680.820
2 CFR 200.306
TEGL 30-14

INQUIRIES

Direct Inquiries To:
WorkForce Central
3650 South Cedar Street
Tacoma, WA 98409-5714
(253) 472-8094 or 1-800-999-8168

APPROVED

Linda Nguyen, WFC CEO
Date: _____

APPROVED BY WDC

Date _____

Individuals with Barriers to Employment

WIOA Sec. 3(24) and Proposed CFR 680.320(b):

- Displaced Homemaker
- Low-income individuals
- Indians, Alaska Natives and Native Hawaiians
- Individual with disabilities
- Older individuals
- Ex-offenders
- Homeless individuals
- Youth who are in or have aged out of the foster care system
- Individuals who are English language learners, low levels of literacy or facing substantial cultural barriers
- Eligible migrant and seasonal farm workers
- Individuals within 2 years of exhausting lifetime eligibility under Part A of Title IV of the Social Security Act
- Single parents (including pregnant women)
- Long-term unemployed