



# workforce

## SOUTHWEST WASHINGTON

### WSW BOARD OF DIRECTORS MEETING

Tuesday, March 14, 2023

4:00 pm to 6:00 pm

Zoom Conference Call

4:00 pm	Welcome, introduction of members, guests, and staff	
4:05 pm	Consent Agenda *	Paige Spratt
	<ul style="list-style-type: none"><li>• Minutes, Contract, Policy, &amp; Administrative Memos</li><li>• WIOA ISY Funding Memo</li><li>• WSW Strategic Plan Revisions</li></ul>	
4:10 pm	Finance	Renny Christopher
	<ul style="list-style-type: none"><li>• Audit Report *</li><li>• Treasurer's Memo</li><li>• Quarterly Financial Reports</li></ul>	Barri Horner
4:20 pm	Economic Mobility Committee	Shannon Stull
4:25 pm	Governance Committee	A.D. Simmons
	<ul style="list-style-type: none"><li>• Committee Membership</li><li>• New Board Member Recruitment Planning</li></ul>	Nathan Webster
		Tracy Doriot
4:40 pm	Workforce Innovation and Opportunity Act (WIOA) Title 1 Youth RFP Awardee *	Lyn Love
4:55 pm	State of the Workforce Presentation + Q&A	Liza Morehead, PHD WorkSystems
5:45 pm	CEO Report	Miriam Halliday
5:55 pm	Public Comment	Paige Spratt
6:00 pm	Adjourn	Paige Spratt

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\* - Action Required



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## WSW Board Meeting Minutes

December 13, 2022

4:00 p.m.

Workforce Southwest Washington – Mt. Rainier Room

**Board Members Present:** Mike Bridges, Jen Baker, Angela Burckhard, Renny Christopher, Ralph Clark, Tracy Doriot, Karin Edwards, Corey Giles, Bob Gustainis, A.D. Simmons, Paige Spratt, Shannon Stull, Ted Sprague, Mark Tishenko, Jasmine Tolbert, John Vanderkin, Adrienne Watson, Nathan Webster.

**Board Members with Excused Absences:** Chris Bailey, Bob Carroll, Monte Constable, Suba Jagannathan, Ilona Kerby, Mandy Kipfer, Mike Nieto, Stacey Smith, and Commissioner Lee Tischer.

**Board Members with Unexcused Absences:** Mara Kieval.

**Guests Present:** Becky Ford Sullivan, Brent Freeman, Rodney Seales, Tennille Johnson, Elizabeth Kiehn, Thyda Lim, Michelle McClanahan, Andrea Clark, Mei Taylor, Jessica Richards, and Gwen Clark.

**Staff Members Present:** Miriam Halliday, Mando Antonino, Linda Czech, Kali Dugan, Denise Elliott, Amy Gimlin, Betsy Hanrahan, Darcy Hoffman, Barri Horner, Alyssa Joyner, Kari Kollander, Lyn Love, Julia Maglione, Sean Moore, Tamara Toles, Nolan Yaws-Gonzalez, and Traci Williams.

### Welcome, Introduction of Members, Guests, and Staff

Chair Paige Spratt opened the meeting at 4:04 p.m. and welcomed everyone in attendance. Members and staff introduced themselves.

### CONSENT AGENDA

Chair Spratt entertained a motion to approve the Consent Agenda, consisting of the minutes from the Council meeting held on September 14, 2022, Contract Memo, Policy Memo; which included WSW Training Policy Handbook – Attachment A, WSW Data Element Validation Policy #3037 Rev 1, and WSW Monitoring Policy #203 Rev 4.

**Tracy Doriot moved to approve the Consent Agenda as presented, second by Shannon Stull. Motion carried.**

### FINANCE

WSW Treasurer, Renny Christopher presented the treasurers' memo to the full Board. Financial reports on operations, subcontracts, and grant spending were presented, noting that WSW is on track with spending for PY22 Q1 and no major concerns. The audit firm of Johnson, Stone, and Pagano is compiling the audit report for the fiscal year ending 06/30/2022 and will be presented to the Finance Committee and Executive Board in January 2023. The final report will be available at the March 2023 Board of Directors Meeting.

WSW Board of Directors Meeting

December 13, 2022

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WSW Chief Financial Officer, Barri Horner, recapped the necessary budget revisions for the second half of the fiscal year beginning on January 1, 2023. Following the presentation, questions were invited but none were forthcoming.

**Renny Christopher moved to approve the budget revision as presented, second by Mike Bridges. Motion carried.**

#### **GOVERNANCE**

**Board Member Elections:** Governance Co-Chair's Ralph Clark and A.D. Simmons gave introductions of Rodney Seales, WestRock; Adam Blackwell, Molecular Testing Labs; Tennille Johnson, ESD; and Brent Freeman, Wahkiakum School District, sharing with the full board unique qualities that the Governance Board thought each perspective board member would bring to the WSW board. A motion was entertained to approve all four for Council terms beginning on January 1, 2023 through December 31, 2025.

**Ralph Clark moved to accept the nominations of Rodney Seales, Adam Blackwell, Tennille Johnson, and Brent Freeman to serve on the WSW Board of Directors as presented, second by Bob Gustainis. Motion carried.**

#### **Term Completions:**

A.D. Simmons shared that Ralph Clark has completed his term as s WSW Board of Director.

#### **CONNECTING THE DOTS**

The WSW Board of Directors, WSW Staff, and guests split up into groups and took turns learning more about Education and Workforce Development, Economic Development and Workforce Development, Labor and Workforce Development, Healthcare and Workforce Development, and Communications and WSW Board of Directors.

#### **BOARD RECOGNITION**

Chair Paige Spratt honored John Vanderkin with the "WSW Board Member of the Year" 2022 award. Chair Spratt also thanked Ralph Clark for the time he spent on the WSW Board of Directors, Executive Committee, and Governance.

#### **CEO UPDATES**

Miriam Halliday shared that if any board members were interested in joining the WSW Finance Committee, WSW Governance Committee, or the WSW Executive Committee to please reach out to Chair Paige Spratt or herself.

#### **PUBLIC COMMENT**

Public comments were invited but none were forthcoming.

#### **ADJOURNMENT**

With nothing further for the good of the order, Chair Spratt entertained a motion to adjourn the meeting at 5:38 p.m.

**Ted Sprague moved to adjourn the meeting at 5:38 p.m.**



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## CONTRACT MEMO

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**DATE:** MARCH 09, 2023  
**TO:** MIRIAM HALLIDAY, CEO  
WSW BOARD OF DIRECTORS  
**FROM:** LINDA, WSW CONTRACTS MANAGER  
**RE:** CONTRACT/GRANT UPDATES (JANUARY – MARCH 2023)

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WSW **modified** the following contracts:

- Equus Workforce Solutions budget increase of \$110,000 for total budget of **\$480,718.82** to provide Employment Security Department Disaster Relief Employment and extend end date to **June 30, 2023**.
- Clark College budget increase of \$24,162 to System Liaison for total budget of **\$73,037** and extend end date to **June 30, 2023**.
- Equus budget decrease of \$5,888 for total budget of **\$16,667**, for Education and Employment Training (EET), an evidence-based program that works with youth, end date **June 30, 2023**.
- PointNorth budget increase of \$20,000 for total budget of **\$40,000** to provide focus groups and survey and extend end date to **June 30, 2023**.
- Equus for Incumbent Worker Training to extend end date to **November 30, 2023**. No change in budget total of **\$200,000**.
- Equus to decrease budget by \$150,000 for Community Development Block Grant-Coronavirus Response, for total budget of **\$423,224**.

WSW **executed** the following contracts:

- Equus Workforce Solutions for **\$40,000** to fund childcare to individuals receiving services at Next in Vancouver, **ending June 30, 2023**.
- Love Overwhelming for **\$120,000** to provide Adult and Dislocated Services, **ending September 30, 2023**.
- Columbia River Economic Development Council for **\$30,000** to provide Business Outreach services in Clark County, **ending December 31, 2023**.
- PointNorth budget increase of \$20,000 for total budget of **\$40,000** to provide focus groups and survey and extend end date to **June 30, 2023**.
- Equus for **\$675,000** to is to support, develop, and train dislocated workers ending **September 30, 2024**.

**WSW *notification of grant award/execution:***

- WSW received executed grant for *QUEST Disaster Recovery National Dislocated Worker Grant* through Employment Security Department effective October 1, 2022 to September 30, 2024. Grant award amount is **\$1,186,028**.
- WSW received executed grant for *Community Project-Summerworks* through U.S. Department of Labor Employment and Training Administration effective January 1, 2023 to December 31, 2025. Grant award amount is **\$1,500,000**.
- WSW received executed grant modification for *Educational and Employment Training* through Clark County Juvenile Court for January 1, 2023 to June 30, 2023. Grant award amount decreased by \$8333 although cost per case increased \$75 for total of **\$16,667**.
- WSW received executed grant modification for COVID-19 Disaster Relief Employment Recovery DWG through Employment Security Department to extend period of performance to **June 30, 2023**.
- WSW received executed grant modification for *CDBG-CV Hunger Relief* through Washington Department of Commerce for January 1, 2021 to June 30, 2023. Grant award amount decreased by \$150,000 for total of **\$487,500**.
- WSW received executed grant for Machinist Institute Career Accelerator per-apprenticeship programs though Machinist Institute for January 1, 2023 to June 30, 2024 for total of **\$5,000**.
- WSW received executed grant modification for NHE Disaster Recovery for the Opioid Crisis National Dislocated Worker Grant through Employment Security Department to update performance and budget. Grant award amount remained the same at **\$700,000**.
- WSW received executed grant modification for Fourth Plain Navigator through City of Vancouver for an increase of \$5,000 for total of **\$25,000** and extend the end date to December 31, 2023.
- WSW received executed grant modification for Basic Food Employment & Training (BFET) to reduce budget by \$80,448 for total budget **\$269,059**.



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**POLICY MEMO**

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**DATE:** MARCH 9, 2023  
**TO:** MIRIAM HALLIDAY  
WSW BOARD OF DIRECTORS  
**FROM:** TRACI WILLIAMS, WSW OFFICE MANAGER/EXECUTIVE ADMINISTRATOR  
**RE:** POLICY UPDATES

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**[Data Element Validation Policy 3037-2](#)**

This was a revision to our Data Element Validation Policy. Employment Security Department revised the state policy which updates definitions and source documentation to align with Training and Employment Guidance Letter (TEGL) 23-19, Change 1 around self-attestation.

Based on the approval process, this policy approval falls under **Tier 1** Executive Committee and Full Board notification.

**Tier 1 – Minimum**

Definition: Minimum revisions consist of grammar, spelling, branding changes, State or Federal mandated adjustments, or a new State or Federal mandated policy with no local revisions. These revisions would not require Executive or Full Board approval but would be included in a notification memo.

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## MEMO

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**DATE:** MARCH 9, 2023  
**TO:** PAIGE SPRATT, BOARD CHAIR  
WSW BOARD OF DIRECTORS  
**FROM:** AMY GIMLIN, CHIEF OPERATING OFFICER  
**RE:** MIRIAM HALLIDAY HIRING

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In late 2021, the hiring committee put forth their recommendation to hire Miriam Halliday as Workforce Southwest Washington's Chief Executive Officer. The Executive Board approved the hiring in November 2021. The notification went to the board in December 2021. However, there was not a motion nor a vote from the Board of Directors to hire Miriam.

During a recent monitoring of WSW, it was found that our Bylaws are missing this key point that the Board of Directors must approve the hiring of the Chief Executive Officer.

Therefore, please approve the hiring of Miriam Halliday as the Chief Executive Officer effective December 1, 2021.

There will be communication coming for the revision of the Bylaws to incorporate this edit.



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## WIOA YOUTH FUNDING MEMO

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**DATE:** MARCH 9, 2023  
**TO:** WSW BOARD OF DIRECTORS  
**FROM:** LYN LOVE, PROGRAM MANAGER  
**RE:** WIOA IN SCHOOL YOUTH FUNDING REQUEST

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### Background

The Department of Labor's Workforce Innovation and Opportunity Act (WIOA)'s Title 1 Youth investment requires that a minimum of 75% of funds be spent on serving out-of-school youth. Out-of-school youth are defined as: youth ages 16-24 who are not in-school and do not have their high school diploma or equivalent; or youth ages 16-24 with a high school diploma or equivalent, not attending post-secondary education and facing other barriers such as having a disability, being houseless, justice involved, etc. The remaining 25% is left to the local workforce development board's purview to determine the focus (Out-of-school vs In-school).

Since 2017, WSW has allocated 100% of the WIOA Title 1 Youth investment towards out-of-school youth to provide disconnected youth with the education, training, and employment resources they need. While it is necessary to serve this demographic of our community, focusing all the WIOA Title 1 Youth investment on out-of-school youth does not address the foundational challenges and reasons why out-of-school are disconnected.

There are strong indicators that additional supports to at-risk, in-school students can keep them from disconnecting. Washington State University performed a study with Vancouver Public School students and found data that suggests students who participate in work-based learning, activities that this funding can support if opened to in-school students, are nearly four times more likely to graduate on-time compared to non-participants.

Additionally, WSW's investments in out-of-school youth through the Next one-stop model have become more efficient at serving the out-of-school youth population. Next has increased relevant partnerships in a post-Covid-19 era to provide holistic supports to out-of-school youth. Their participant outreach plan has improved through strategic changes like co-locating with partners, creating, and leading more community events, and the continual use of social media and marketing materials.

### Request

WSW is recommending that a maximum of 15% of all allocated WSW WIOA Title 1 Youth funds be made available to be invested in in-school youth across the SW WA region. WSW will prioritize at-risk, in-school youth who need additional supports to be proactive, supporting youth **before** they become disconnected. This added layer in the WSW emerging talent strategy will ensure that we are addressing the current need as well as working to prevent future need.

*WSW's Executive Committee approved the WIOA In School Youth funding request at the February 15<sup>th</sup> Executive Committee meeting.*





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## POLICY MEMO

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**DATE:** MARCH 9, 2023  
**TO:** WSW BOARD OF DIRECTORS  
**FROM:** MIRIAM HALLIDAY, CEO  
**RE:** STRATEGIC PLAN REVISION

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### Strategic Plan Extension

From 2019-2020, WSW CEO and Board of Directors underwent a massive strategic planning process that incorporated surveying and focus groups of partners, employees, and board members. The result has been a strong and relevant strategic plan that has guided the work of the WSW team and Board of Directors over the last 2 and a half years. The current strategic plan set the organization on a new course, focused on entirely new objectives and indicators to track. As a result, the development of the infrastructure to effectively measure and report has taken time and intentionality of the team. The WSW CEO and Executive Committee discussed at great length in various Executive Committee meetings the importance of maintaining the strong commitment to the goals of Economic Mobility, Business Recovery and Growth, and Systems Change, and the strong viability of the plan to support the work of the organization one additional year, into 2024.

### Systems Change Strategies + Indicator Revision

Systems Change was an entirely new goal for the WSW organization and leadership to take on. As a result, iteration is necessary to ensure strong relevancy and effectiveness. Further, there are two key challenges to measuring quantitatively the impact of system focused interventions. System change interventions typically require concerted effort, involving many actors and partners, thus it is difficult to have clear attribution and time measured impacts. The WSW CEO proposes the following changes to the Systems Change Strategies and Indicators:

Systems Change Revised				
An effective and equitable workforce system exists, advancing the community and economic development goals of the region.	Engagement and overall satisfaction scores for organization via annual survey and focus groups. (Qualitative)	N/A	1	4
	Business partner satisfaction scores	N/A	N/A	85%
	Number of industry co-investment and/or funder co-investment in workforce development.	N/A	N/A	15
	Increased State-wide, local, and Non-WIOA funding development.	N/A	N/A	15%

For reference, see below for the current Systems Change Strategies and Indicators.

Systems Change				
An effective and equitable workforce system exists, advancing the community and economic development goals of the region.	Number of partnerships with organizations and individuals who serve historically underserved populations	N/A	N/A	10
	Business & job seeker customer satisfaction scores	N/A	N/A	?
	Number of funder partnerships	N/A	N/A	5
	Number of new Local, State, National policies enacted to support our local workforce development system goals	N/A	N/A	?

*WSW's Executive Committee approved Career Path Services' proposal at the February 22<sup>nd</sup> Executive Committee meeting.*

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## ECONOMIC MOBILITY STATUS REPORT

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**DATE:** March 10, 2023  
**TO:** WSW BOARD OF DIRECTORS  
**FROM:** MARNIE FARNES – DIRECTOR OF PROGRAMS  
**RE:** ECONOMIC MOBILITY STATUS REPORT

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Members of the Board –

This document is intended to provide a status snapshot for several of WSW’s investments. Detailed information on investment performance and spending may be seen in WSW’s fiscal contract spending reports.

Further this specific memo contains a high-level summary of six investments. These investments are top of mind for the WSW Programs Team and show several common strengths and challenges of the workforce system in Southwest Washington.

### **Covid-19 Dislocated Worker Grants (2)**

**Summary:** Two grants provide both job training and career navigation support for individuals dislocated from work due to the pandemic. WSW received these funds in partnership with the Washington Workforce Association and Employment Security Department from the Department of Labor during the pandemic to meet the needs of our worker community in a time of complete unknown and massive unemployment.

**Status:** Both grants are exceeding performance goals. Expenditures are behind and the WSW Program Team is working with the contractor to ensure a strong completion to the grant periods in June 2023.

**Notable Highlights:** Both grants have been modified over 7 times to ensure relevancy to the needs of the region over the course of the pandemic. While this has been significant administrative work both with our contractor and our grantee, this has ensured that the investment was able to shift as the community needed. With unemployment at similar levels to prior to the pandemic, this investment has supported over 400 individuals across SW WA re-career during a highly volatile time in our economic history.

### **City of Vancouver Community Development Block Grant**

**Summary:** Grant provides \$40,000 at Next, aiming to support low-income mothers of color residing in the Vancouver area with childcare and other employment and training reimbursements (transportation, educational testing, books and supplies, etc.). These funds have been matched to the 50% reimbursement model of Basic Food Employment and Training (BFET) to build an ongoing revenue for this specific investment strategy into the future.

**Status:** The grant will be extended to end December 2023. There are no enrolled participants currently, as there have been challenges identifying mothers in Next’s 16-24 age range, especially mothers not receiving childcare support.

**Notable Highlights:** There are a few high quality BFET service providers in Vancouver, one of which being Clark College. WSW will be meeting with the community college as well as other community based organizations in the next month to reimagine the investment strategy, and ensure that the goal is attained.

### **City of Vancouver/Key Bank Fourth Plain Navigator**

**Summary:** WSW received a grant from Key Bank and the City of Vancouver to connect Fourth Plain Blvd residents and businesses to the workforce system to provide training, education, and employment assistance. Next staff have been co-locating at Fourth Plain Forward's office and spending more time in the Fourth Plain community to establish connections with various families and business owners. These funds have been matched to the 50% reimbursement model of Basic Food Employment and Training (BFET) to build an ongoing revenue for this specific investment strategy into the future.

**Status:** The grant ends March 31, 2023. Performance has been met for connecting with businesses and providing referrals to WorkSource. Performance is behind with Next enrollments. It has taken time to build trust in the community, but the team continues to see improvements by hosting events and being consistent.

**Notable Highlights:** WSW is working with the City of Vancouver to get the contract extended to December 31, 2023. As noted, there is recognition that building trust in a community takes time.

### **Department of Commerce Community Development Block Grant**

**Summary:** Grant provides capacity (staffing) to regional food distribution sites and was received during the pandemic to support the many community-based organizations focused on food access in the region. The individuals who are placed at the food banks then receive job training and career readiness, allowing for them to re-career when their paid internship is completed. WSW received these funds in partnership with the Department of Commerce during the pandemic, to have a workforce strategy (both short term and long term) as it relates to food access throughout the region.

**Status:** The grant ends June 2023, and to date the grant performance is nearly attained, and expenditures are on track for a strong finish to the project.

**Notable Highlights:** This grant has been a great showcase of the strong partnership across the 12 local workforce development boards across the State with the high performance attained and strong partnerships at the local level. Funding has been repeatedly reallocated across the State to allow for increased investment where the need is the greatest, providing a quality example of equitable workforce investment.

### **Opioid Epidemic Dislocated Worker Grant**

**Summary:** Grant provides specific job training and career services to individuals who have been affected by the Opioid epidemic. WSW worked closely with Employment Security Department in attaining this investment for our region, and strong local partnerships have made it a success.

**Status:** Contract ends June 30, 2023. To date, performance is exceeded on nearly every level. One metric requiring more attention pertains to training participants for professional fields that can impact opioid crisis. WSW and WorkSource met with Clark College and Lower Columbia College to identify opportunities for students engaged in programs related to chemical dependency treatment, and we will work with the partners to have a strong completion.

**Notable Highlights:** WSW is working with Employment Security Department on a second cycle of funding as this project has shown great success.

### **Thrive (AKA Economic Security for All - ECSA)**

**Summary:** The Thrive (part of WA State's Economic Security for All) investment aims to move people out of poverty with community driven service engagement and wrap around support, focusing on high quality employment outcomes. WSW's Thrive initiative has worked to lift participants out of poverty in specifically Cowlitz and Wahkiakum Counties since 2017.

**Status:** WSW is receiving funds from the WA State general budget as well as the Governors Discretionary funds to invest in the Thrive model. There are high enrollment numbers, as well as a strong focus on training placement now. The Washington Workforce Association, in partnership with Employment Security Department, is advocating for additional funds to increase outcomes in this highly successful statewide workforce initiative.

**Notable Highlights:** Thrive fills a gap in partnership with the Department of Social Human Services, supporting individuals to achieve self-sufficiency who are currently receiving food benefits. The WSW contractor regularly and often reaches out to individuals who might need additional training to re-career. This strong partnership with DSHS has been a notable highlight in this investment.

*WSW's Executive Committee and Finance Committee reviewed and approved the full fiscal contract report at the February 15<sup>th</sup> Executive-Finance Committee meeting.*

Questions? Contact Marnie at [marniefarness@workforcesw.org](mailto:marniefarness@workforcesw.org) or 360-559-5090



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**TREASURERS' MEMO**

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**DATE:** MARCH 14, 2023  
**TO:** WSW BOARD OF DIRECTORS  
**FROM:** RENNY CHRISTOPHER – TREASURER OF THE BOARD *RC*  
BARRI HORNER – CHIEF FINANCIAL OFFICER  
**RE:** FINANCE COMMITTEE REPORT OUT

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**The Finance Committee and the Executive Board of the WSW Board of Directors met on February 15, 2023.** Spending and obligations reports for the quarter ending December 31, 2022 were included in the meeting packet for review. The report documents were reviewed and discussed at the meeting. Craig Catlin, CPA representing the accounting firm of Johnson, Stone and Pagano attended the meeting. Mr. Catlin presented the draft Financial Audit Report for the fiscal year ending June 30, 2022. The Finance Committee and Executive Board voted to accept the report.

**QUARTERLY REPORTS – QUARTER ENDING 12/31/22**

A summary memo (page 2) and detailed reports (pages 3 - 46) are included for review.

- **BUDGET EFFECTIVE 07/01/2023**

A fiscal year budget for the program year beginning July 1, 2023 will be available at the June 2023 board meeting.

**ANNUAL FINANCIAL AUDIT**

The accounting firm of Johnson, Stone, and Pagano has issued an unmodified financial audit report for the fiscal year ending June 30, 2022. The Audit Report and Statement on Auditing Standards 114 communication letter have been provided to you with the meeting packet.



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## RFP RECOMMENDATION MEMO

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**DATE:** MARCH 9, 2023  
**TO:** WSW BOARD OF DIRECTORS  
**FROM:** LYN LOVE, WSW PROGRAM MANAGER  
**RE:** WIOA TITLE 1 B YOUTH RFP RECOMMENDATIONS

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### TIMELINE

	DATE
RFP Opened	December 7, 2022
Promote + Share RFP	December 7, 2022 to February 3, 2023
Proposer's Conference: Virtual + In-Person at Cathlamet	January 9, 2023
Proposer's Conference: Virtual + In-Person at WSW Office	January 11, 2023
Implicit + Explicit Bias Training for Scoring Committee Members	February 9, 2023 – Independently
Proposals Due	February 10, 2023
Scoring Committee Review	February 10, 2023 to February 22, 2023
Proposer Presentations	February 16, 2023
RFP Committee Convening & Contractor Recommendation	February 22, 2023
Executive Board Review + Approval	February 22, 2023
Board Approval of New Providers	March 14, 2023
Contract Development	March 20, 2023 to June 2, 2023
Feedback Meeting with Bidders	TBD – April
Send Contract to Board	June 8, 2023
Board Approval of Contract	June 13, 2023
Anticipated Contract Start Date	July 1, 2023

### Selection Process

A Scoring Committee was formed in October 2022 to guide and lead this process. Committee members included Denise Elliot, Amy Gimlin, Lyn Love and Sean Moore from WSW's staff and Amanda Kipfer and Ted Sprague from the WSW Board of Directors. Along with the proposal submissions, every proposer presented to the committee in-person on February 16, 2023.

The committee scored each proposal based on a scoring rubric with the following criteria:

- **Criteria 1:** Demonstrated Experience and Ability 20 points
- **Criteria 2:** Relationships and Collaboration 25 points
- **Criteria 3:** Program Design 40 points
- **Criteria 4:** Program Cost and Budget 15 points

### **Bidding Agencies**

1. Career Path Services' consortium
2. Equus Workforce Solutions' consortium

### **Final Scores**

	Available Points	1	2	3	4	5	6	TOTAL	Median	Mean
<b>Proposer:</b> Career Path Services										
Criteria 1: Demonstrated Experience and Ability	20	20	20	17	19	18	20	111	18.5	18.5
Criteria 2: Relationships and Collaboration	25	22	21.5	25	23	26	25	135	24	22.5
Criteria 3: Program Design	40	39	37	34.5	40	39	40	218.5	39	36.4
Criteria 4: Program Cost and Budget	15	14	15	13	15	15	15	87	15	14.5
<b>TOTAL</b>	<b>100</b>	<b>95</b>	<b>93.5</b>	<b>89.5</b>	<b>97</b>	<b>98</b>	<b>100</b>	<b>573</b>	<b>96</b>	<b>95.5</b>

	Available Points	1	2	3	4	5	6	TOTAL	Median	Mean
<b>Proposer:</b> Equus Workforce Solutions										
Criteria 1: Demonstrated Experience and Ability	20	17	10.5	9	16	14	20	86.5	15	14.4
Criteria 2: Relationships and Collaboration	25	14.5	20.75	16	18	23	20	112.25	19	18.7
Criteria 3: Program Design	40	28	28.25	22.5	36	35	30	179.75	29.1	30
Criteria 4: Program Cost and Budget	15	11	15	14	10	11	15	76	12.5	12.7
<b>TOTAL</b>	<b>100</b>	<b>70.5</b>	<b>74.5</b>	<b>61.5</b>	<b>80</b>	<b>83</b>	<b>85</b>	<b>454.5</b>	<b>77.25</b>	<b>75.75</b>

### **Recommendation**

Based on the proposals, presentations, and discussion of the Scoring Committee, the Committee recommends that the WSW Executive Committee of the WSW Board of Directors invest in the Career Path Services' consortium for the WIOA Title 1 B Youth contract.

Career Path Services provided an innovative proposal that will ultimately benefit young adults throughout the SW WA region. Highlights include having an online Highschool Diploma Completion Academy, virtual career coaching and guidance infrastructure that provides participants with resources and enrollment documents 24/7, and a well-developed social media strategy to reach disconnected young adults throughout the community.

Career Path Services also cultivated a thoughtful consortium that includes community partners such as Partners in Careers; Goodwill of the Olympic Rainier Region; Clark College; The Underdog Mentality; the Greater Vancouver Chamber of Commerce; Department of Children, Youth and Families; Vancouver Housing Authority; Lutheran Community Services; and the Clark County Juvenile Court. They also acknowledged the limitations of their consortium and proposal and have a strong strategy to overcome those challenges in their first year of investment.

*WSW's Executive Committee approved Career Path Services' proposal at the February 22<sup>nd</sup> Executive Committee meeting.*





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## MEMO

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**DATE:** FEBRUARY 15, 2023

**TO:** WSW FINANCE COMMITTEE  
WSW EXECUTIVE BOARD

**FROM:** BARRI HORNER, CHIEF FINANCIAL OFFICER

**RE:** WSW QUARTERLY FINANCIAL REPORTS

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WSW quarterly spending reports for the second quarter of the current fiscal year are available and included in the meeting packet.

### QUARTERLY REPORTS

**WSW WIOA Fund Obligations (Page 3):** All active WIOA Formula Fund Grants are displayed for the three funding streams. The prior year's grant allocations are 100% obligated for all funds. Current year grants are required to be 80% obligated by June 30, 2023. Obligation totals include all contracts executed and all operational spending as of December 31, 2022. Only contracted funds can be obligated before they are spent. Operational costs are obligated over time as funds are expended. The WIOA Youth obligation percentage is too low. Additional contracts will need to be executed prior to the June 30 target date.

**WSW Coordination and Admin (Page 4):** Total spending for WSW operations is at 47.5% of budget as of December 31, 2022. Noteworthy variances are explained on the report. Many categories are not expected to be spent evenly across the year, such as Equipment, Travel, and Conferences. There are no major concerns with current spending rates.

**WIOA Formula Contracts (Pages 5-6):** This report lists contracts obligated, by category, for the current fiscal year.

**Grant Budget vs Actual Spending (Pages 7-19):** These reports communicate the details of competitive and other state and federal grants with fixed grant terms which have been awarded to WSW. Most have line item budgets. Data displayed in the reports includes the length of the funding term, budget versus actual spending by budget line item, and contracted obligations. WIOA Formula funding is not included in this group of reports. Most of the funds are on track with expectations. Activity is expected to increase over the course of the year for those that are behind in spending relative to the length of time they have been in play.

**Subcontract Spending and Performance (Pages 20-46):** These reports display spending and performance measured against expectations for twenty-six separate programs/contracts. All funding sources are represented. The reports also display qualitative information regarding the status of the program in the form of comments developed by program management staff. These reports will be presented to and discussed with the Economic Mobility Committee with a report out to the Board of Directors.

# WSW WIOA Fund Obligations

	B	C	D	E	F
2	<u>WIOA ADULT</u>				
9					
10	<b>WSW WIOA ADULT PY21 &amp; PY22 ALLOCATION</b>				
11					
12	YEAR	ALLOCATION	OBLIGATED AS OF 12/31/22		PERCENT OBLIGATED*
13					
14					
15	Total WIOA Adult allocation 7.1.21	\$ 1,338,019	\$ 1,338,019		100.00%
16	Total WIOA Adult allocation 7.1.22	\$ 1,152,203	\$ 913,872		79.32%
17					
18					
19					
20					
21	<u>WIOA DISLOCATED WORKER</u>				
28					
29	<b>WSW WIOA DW PY21 &amp; PY22 ALLOCATION</b>				
30					
31	YEAR	ALLOCATION	OBLIGATED AS OF 12/31/22		PERCENT OBLIGATED*
32					
33	Total WIOA DW allocation 7.1.21	\$ 1,254,442	\$ 1,254,442		100.00%
34	Total WIOA DW allocation 7.1.22	\$ 1,081,471	\$ 688,782		63.69%
35					
36					
37					
38					
39	<u>WIOA YOUTH</u>				
46					
47	<b>WSW WIOA YOUTH PY21 &amp; PY22 ALLOCATION</b>				
48					
49	YEAR	ALLOCATION	OBLIGATED AS OF 12/31/22		PERCENT OBLIGATED*
50					
51	Total WIOA YOUTH allocation 4.1.21	\$ 1,373,504	\$ 1,373,504		100.00%
52	Total WIOA YOUTH allocation 4.1.22	\$ 1,185,939	\$ 437,650		36.90%
53					
54					
55					
56					
57					
58	NEED TO REACH 80% BY 6/30/23				

Southwest Washington Workforce Development Council DBA Workforce Southwest Washington  
Statement of Revenues and Expenditures  
From 7/1/2022 Through 12/31/2022

(In Whole Numbers)

	Current Year Actual	Total Budget - Operating	Total Budget Variance - Operating	Spending Rate Percentage	
Internal Expenses					
Personnel	941,059	1,971,467	1,030,408	47.73%	
Professional Services	53,881	95,150	41,269	56.62%	
IT: Computer Support	17,456	37,200	19,744	46.92%	
IT: Licensing, annual fees, software	40,698	64,635	23,937	62.96%	NOTE 1
Supplies	8,352	10,010	1,658	83.43%	NOTE 2
Telephones	5,384	11,436	6,052	47.08%	
Postage, print, copy, equipment rentals	9	900	891	1.02%	
Occupancy	62,115	123,420	61,305	50.32%	
External Printing and Publications	577	3,000	2,423	19.24%	
Travel					
LOCAL TRAVEL	3,417	22,350	18,933	15.28%	
LONG DISTANCE TRAVEL	189	7,500	7,311	2.52%	
Total Travel	3,606	29,850	26,244	12.08%	
Conferences and Meetings					
CONFERENCES & MEETINGS	645	9,500	8,855	6.78%	
Washington Workforce Assoc. Annual Conference	12,883	12,000	(883)	107.36%	
National Association of Workforce Boards Conference	0	18,000	18,000	0.00%	NOTE 3
Total Conferences and Meetings	13,528	39,500	25,972	34.25%	
Insurance	9,269	18,538	9,269	49.99%	
Furniture and Equipment	16,496	41,099	24,603	40.13%	
Local Meeting Support	4,423	5,350	927	82.67%	NOTE 2
Memberships and Subscriptions	11,677	23,520	11,843	49.64%	
Staff Training	10,705	50,000	39,295	21.41%	
<b>Total Internal Expenses</b>	<b><u>1,199,236</u></b>	<b><u>2,525,075</u></b>	<b><u>1,325,839</u></b>	<b><u>47.49%</u></b>	

NOTE 1:

One time fees in the current quarter vs ongoing license fees allocated over time

NOTE 2:

Unanticipated costs related to return to office,new employees

NOTE 3:

Conference occurs in Q3

WORKFORCE SOUTHWEST WASHINGTON  
PY22 CONTRACTS  
WIOA Adult, Dislocated Worker, Youth

				By Funding Source				
Add to category	PY21 Funding*	DESCRIPTION	PY22 \$	Adult	DW	Youth	Other	Total
Outreach	WIOA Gen	Mainstay -Text/Chat Platform	22,764	12,971	8,925	868	-	22,764
Outreach	WIOA Gen	Career Coach Website -WSI Non Contract via EMSI	1,800	980	686	134	-	1,800
Outreach 22-02	AD/DW	Strategies 360	15,000	8,886	6,114		-	15,000
Outreach	Youth	Point North -Outreach Strategy	11,250			11,250		11,250
Outreach	Key Bank COV	Fourth Plain Navigator	30,000				30,000	30,000
Outreach			80,814	22,837	15,725	12,252	30,000	80,814
Equus Summerworks	Youth	Equus	300,000			250,000	50,000	300,000
Equus Youth Clark 22-10	Youth	Equus	824,422			824,422		824,422
Equus Cowlitz 22-11	Youth	Equus	170,010			169,010	1,000	170,010
Equus Youth Wah 22-11	Youth	Equus	4,021			4,021		4,021
Goodwill Cowlitz 22-12	Youth	Goodwill	63,390			63,390		63,390
Goodwill Wah 22-12	Youth	Goodwill	1,535			1,535		1,535
Love Overwhelming 22-23	AD/DW	Love Overwhelming Cowlitz	116,226	68,331	47,895			116,226
Love Overwhelming 22-23	AD/DW	Love Overwhelming Wahkiakum	3,774	2,469	1,305			3,774
Career Team 22-21 Clark	AD/DW	Career Team Clark	742,542	438,598	303,944			742,542
Career Team 22-21 Cow	AD/DW	Career Team Cow/Wah	206,799	121,513	85,286			206,799
Equus 22-24 Operator non-participant	AD/DW	Equus Operator Clark	125,147	73,921	51,226			125,147
Equus 22-24 Operator non-participant	AD/DW	Equus Operator Cowlitz/Wah	34,853	20,480	14,373			34,853
Participant Training and Career Services			2,592,719	725,312	504,029	1,312,378	51,000	2,592,719
Business Services-Quality jobs	WIOA GEN	CEDC 22-06	25,000	14,245	9,801	953	-	25,000
Business Services-Quality jobs	WIOA GEN	Launchpad \$625/mo	4,375	2,493	1,715	167	-	4,375
Business Services-Quality jobs	WIOA GEN	Launchpad \$2,334/mo	28,008	15,959	10,981	1,068	-	28,008
Business Services-Quality jobs	WIOA GEN	Launchpad and Jobs EQ(Chmura) API	16,820	9,584	6,594	641	-	16,820
Business Services-Quality jobs	WIOA GEN	CREDC 22-29 CYE12/31/24	30,000	17,094	11,762	1,144	-	30,000
Business Services-Quality jobs	WIOA GEN	Labor Market Reports CWWC	7,548	4,301	2,959	288	-	7,548
Business Services-Quality jobs	WIOA GEN	Estolano Advisors	7,000	3,989	2,744	267	-	7,000
Business Services-Quality jobs	WIOA GEN	Launchpad Tech Support	4,000	2,279	1,568	153	-	4,000
Business Services-Quality jobs			122,751	69,944	48,126	4,681	-	122,751
Direct Workforce Development Systems Support	AD/DW	Lightcast	120,000	71,088	48,912	-		120,000
Direct Workforce Development Systems Support	WIOA GEN	Point North Focus Groups	20,000	11,396	7,841	763		20,000
Direct Workforce Development Systems Support	WIOA GEN	Point North (Business) Focus Groups Extension	20,000	11,396	7,841	763		20,000
Direct Workforce Development Systems Support	Youth	Point North (Youth) Focus Groups Extension	20,000	-	-	20,000		20,000
Direct Workforce Development Systems Support			180,000	93,880	64,595	21,525	-	180,000
SeaKing Self-Sufficiency Calculator	WIOA GEN	SeaKing SS Calculator	2,000	1,140	784	76	-	2,000
Systems Technology			2,000	1,140	784	76	-	2,000
Systems Liasons	WIOA GEN	LCC	78,200	44,559	30,659	2,982	-	78,200
Systems Liasons	WIOA GEN	WSUV	125,000	71,226	49,007	4,767	-	125,000
Systems Liasons	WIOA GEN	WHHS	90,268	51,435	35,390	3,442	-	90,268
Systems Liasons	WIOA GEN	Clark College	24,625	13,411	9,382	1,832	-	24,625
Systems Liasons	WIOA GEN	Clark College	24,162	13,159	9,206	1,798	-	24,162
Systems Liasons			342,255	193,790	133,644	14,821	-	342,255

WORKFORCE SOUTHWEST WASHINGTON  
PY22 CONTRACTS  
WIOA Adult, Dislocated Worker, Youth

	PY22 \$	Adult	DW	Youth	Other	Total
TOTAL CONTRACTS	3,320,539	1,106,903	766,902	1,365,734	81,000	3,320,539
Systems Liasons		193,790	133,644	14,821	-	342,255
Systems Technology		1,140	784	76	-	2,000
Direct Workforce Development Systems Support		93,880	64,595	21,525	-	180,000
Business Services-Quality jobs		69,944	48,126	4,681	-	122,751
Outreach		22,837	15,725	12,252	30,000	80,814
Participant Training and Career Services		725,312	504,029	1,312,378	51,000	2,592,719
	New Contracting Authorized per Budget (Revised V7 11.15.22)					
		<u>1,095,548</u>	<u>1,005,671</u>	<u>1,680,812</u>		
	Diff	(11,355.37)	238,769.20	315,078.30		

Grant Name/No.:	CCJC Employment and Education Training Program			22-23
Effective Dates:	7/1/22-6/30/23			
Agency/Contact:	Clark County Juvenile Court		Term:	12 months
FEE FOR SERVICE	12/31/2022	50% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %
WSW	\$ -	1,464.53	(1,464.53)	0%
Equus Subcontract #22-20	\$ 16,667.00	-	16,667.00	0%
Totals	\$ 16,667.00	\$ 1,464.53	\$ 15,202.47	9%

<b>Total Revenue PY22:</b>		<b>0.00</b>
Paid to Contractor		0.00
WSW Costs		1,464.53
<b>Total Expense</b>		<b><u>1,464.53</u></b>
<b>Net Revenue</b>		<b>\$ (1,464.53)</b>

Grant Name/No.:		QUEST Disaster Recovery		7572-03	
Effective Dates:		10/1/22-9/30/24			
Agency/Contact:		Employment Security		Term:	24 months
		12/31/2022			
			13% of Term		
Line Item Expense		Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Personnel: Salaries & Benefits		\$ 123,765.00	2,081.74	121,683.26	2%
Personnel: Travel		\$ 4,000.00	-	4,000.00	0%
Indirect		\$ 122,235.00	1,185.83	121,049.17	1%
Subcontracts		\$ 936,028.00	-	936,028.00	0%
Totals*		\$ 1,186,028.00	\$ 3,267.57	\$ 1,182,760.43	0%

Total Subcontracts Budget	\$ 936,028.00	
	\$ -	IFA/RSA
Unobligated Balance	<u>\$ 936,028.00</u>	Remaining Unobligated

Grant Name/No.:		EcSA - Round 2		7621-07	
Effective Dates:		4/1/22-3/31/24			
Agency/Contact:		Employment Security		Term:	24 months
		12/31/2022			
		38% of Term			
Line Item Expense		Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Personnel: Salaries & Benefits	\$	68,544.00	21,338.43	47,205.57	31%
Personnel: Travel	\$	1,000.00	-	1,000.00	0%
Communication	\$	7,000.00	3,500.00	3,500.00	50%
Indirect	\$	68,544.00	22,135.67	46,408.33	32%
Subcontracts	\$	216,651.00	35,237.03	181,413.97	16%
Totals*	\$	361,739.00	\$ 82,211.13	\$ 279,527.87	23%

Equus 21-21	\$	175,803.00	
CBO to be Procured	\$	36,648.00	
Total Subcontracts Budget	\$	216,651.00	
Unobligated Balance	\$	4,200.00	IFA/RSA
	\$	-	Remaining Unobligated



Grant Name/No.:		EcSA - Round 3 (State)		1621-02	
Effective Dates:		7/1/22-6/30/23			
Agency/Contact:		Employment Security		Term:	12 months
		12/31/2022			
		50% of Term			
Line Item Expense		Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Personnel: Salaries & Benefits		\$ 68,185.20	52,394.81	15,790.39	77%
Personnel: Travel		\$ 6,500.00	954.16	5,545.84	15%
Communication		\$ 10,996.00	5,000.00	5,996.00	45%
Indirect		\$ 81,648.00	42,478.51	39,169.49	52%
Subcontracts		\$ 390,434.80	112,293.20	278,141.60	29%
Totals*		\$ 557,764.00	\$ 213,120.68	\$ 344,643.32	38%

Total Subcontracts Budget	\$ 390,434.80	
Equus 22-18 Equus State	\$ 390,434.80	
Unobligated Balance	\$ -	Remaining Unobligated

Grant Name/No.:	COVID-19 DRDW			7580-64
Effective Dates:	5/1/20-6/30/23			
Agency/Contact:	Employment Security			Term: 38 months
	12/31/2022			
MOD 7 Additional Funds \$240K		84% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Participant Wages				
Disaster Relief Employment	\$ 274,430.00	208,385.85	66,044.15	76%
Participant Fringe Benefits for Disaster Relief Employment	\$ 66,798.00	61,453.42	5,344.58	92%
Career Services (excluding WEX/Internship)	\$ 258,418.00	77,021.13	181,396.87	30%
Training Services, excluding On-the-Job Training (OJT)	\$ 59,427.00	29,832.74	29,594.26	50%
WDC Admin	\$ 4,144.00	3,170.73	973.27	77%
WDC Indirect	\$ 53,803.00	40,579.52	13,223.48	75%
WDC Indirect Admin	\$ 33,584.00	25,347.82	8,236.18	75%
Totals	\$ 750,604.00	\$ 445,791.21	\$ 304,812.79	59%

**Total Subcontracts Budget - several categories have dollars for Subcontracts**

		\$ 573,411.00	
20-09 Equus Mod 4		\$ 480,718.82	
20-11 Equus MOD 3		\$ 12,692.18	
22-24 Equus		\$ 80,000.00	
Contract Obligations	TOTAL	\$ 573,411.00	
Unobligated Balance		\$ -	Remaining Unobligated

Grant Name/No.:	COVID-19 ERDW MOD 5		7590-64	
Effective Dates:	7/1/20-6/30/23			
Agency/Contact:	Employment Security		Term:	36 months
	12/31/2022			
		83% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Career Services (excluding WEX/Internship)	\$ 476,650.00	405,530.58	71,119.42	85%
Workbased Learning (Wex/Intership)	\$ 132,429.00	93,803.59	38,625.41	71%
Training Services (Excluding OJT)	\$ 105,000.00	33,879.00	71,121.00	32%
On-the Job Training	\$ 60,817.00	47,588.16	13,228.84	78%
Supportive Services	\$ 18,953.00	16,509.27	2,443.73	87%
WDC Admin	\$ 4,525.00	4,525.00	-	100%
WDC Indirect	\$ 178,493.00	142,856.99	35,636.01	80%
WDC Indirect/Admin	\$ 103,513.00	103,513.00	-	100%
Totals	\$ 1,080,380.00	\$ 848,205.59	\$ 232,174.41	79%

Total Subcontracts Budget - several categories have dollars for this spending

		\$ 510,771.53	
20-13 Equus Operator		\$ 322,500.00	
20-13 Equus Operator-De-obligate 10.1.21		\$ (259,663.00)	
20-11 Equus MOD 4		\$ 439,571.53	
Contract Obligations	TOTAL	\$ 502,408.53	
	Unobligated Balance	\$ 8,363.00	IFA/RSA
		\$ -	Remaining Unobligated

Grant Name/No.:		Opioid Crisis MOD 2		7530-02	
Effective Dates:		10/26/20-6/30/23			
Agency/Contact:		Employment Security		Term:	32 months
		12/31/2022			
			81% of Term		
Line Item Expense		Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Participant Wages for Disaster Relief Employment		\$ 88,615.00	33,740.95	54,874.05	38%
Participant Fringe Benefits for Disaster Relief		\$ 26,585.00	6,819.98	19,765.02	26%
Career Services		\$ 325,507.00	277,033.43	48,473.57	85%
Training Services		\$ 184,800.00	124,450.33	60,349.67	67%
Supportive Services		\$ 40,000.00	23,535.76	16,464.24	59%
Administrative Costs		\$ 34,493.00	22,903.27	11,589.73	66%
Totals		\$ 700,000.00	\$ 488,483.72	\$ 211,516.28	70%

Total Subcontracts Budget - several categories have dollars for this spending

		\$ 590,594.00	
Equus 20-11 MOD 4		\$ 532,647.00	
De-obligate Equus 20-13 10.1.21		\$ (251,447.00)	
Equus 20-13 MOD 1		\$ 304,800.00	
Contract Obligations	TOTAL	\$ 586,000.00	
	Unobligated Balance	\$ 4,594.00	IFA/RSA
		\$ -	Remaining Unobligated

Grant Name/No.:		BFET		2112-44825	
Effective Dates:		10/1/22-9/30/23			
Agency/Contact:		Employment Security		Term:	12 months
Grant to date costs funded by other non-federal sources and reimbursed at 50% for future use.		12/31/2022	25% of Term		
			Grant Budget	Grant to Date Costs	Budget Balance
Line Item Expense					
Salaries		\$ 43,085.00	15,081.74	28,003.26	35%
Fringe Benefits		\$ 5,170.00	1,706.49	3,463.51	33%
Administrative Services		\$ 157,242.00	59,659.49	97,582.51	38%
Travel and Per Diem		\$ 525.00	-	525.00	0%
Indirect		\$ 61,085.00	21,382.88	39,702.12	35%
Participant Reimbursement:					
Transportation		\$ 4,800.00	100.00	4,700.00	2%
Educational/Credential Testing		\$ 6,000.00	-	6,000.00	0%
Clothing		\$ 5,200.00	447.94	4,752.06	9%
Child Care		\$ 14,000.00	-	14,000.00	0%
Medical		\$ 12,500.00	-	12,500.00	0%
digital Support		\$ 7,000.00	-	7,000.00	0%
Books & Training Supplies		\$ 4,400.00	83.09	4,316.91	2%
Housing		\$ 17,500.00	-	17,500.00	0%
Phone & Internet Services		\$ 5,000.00	-	5,000.00	0%
Personal Hygiene		\$ 6,000.00	10.00	5,990.00	0%
Totals		\$ 349,507.00	\$ 98,471.63	\$ 251,035.37	28%
BFET CONTRACT TO DATE REVENUE			\$ 98,471.63		

Source of reimbursed (match) expenditures:

WA State General Fund (EcSA)	69,560.76
Key Bank	6,549.60
City of Vancouver	5,405.52
Dept. of Commerce-CDBG	16,955.75
BFET Reutilized	0.00
<b>TOTAL</b>	<b>\$ 98,471.63</b>

Grant Name/No.:		CDBG		20-6221C-142	
Effective Dates:		1/1/21 - 6/30/23			
Agency/Contact:		WA Dept. of Commerce		Term:	30 months
		12/31/2022			
Grant executed June 2021			80% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %	
WSW Internal (Staff and Indirect)	\$ 64,276.00	47,013.55	17,262.45	73%	
Subcontract Career Services	\$ 95,625.00	58,775.02	36,849.98	61%	
Subcontract Participant Support Costs	\$ 10,000.00	2,835.91	7,164.09	28%	
Participant Work Experience	\$ 317,599.00	78,651.51	238,947.49	25%	
	\$ -	-	-		
Totals	\$ 487,500.00	\$ 187,275.99	\$ 300,224.01	38%	

Total Subcontracts Budget	\$ 423,224.00	
21-09 Equus	\$ 423,224.00	
Contract Obligations	TOTAL \$ 423,224.00	
Unobligated Balance	\$ -	Remaining Unobligated

Grant Name/No.:	Fourth Plain Navigator		58435	
Effective Dates:	1/1/22 - 3/31/23			
Agency/Contact:	City of Vancouver		Term:	15 months
	12/31/2022	80% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %
WSW Internal (Staff and Indirect)	\$ 10,000.00	6,382.54	3,617.46	64%
Subcontract	\$ 10,000.00	8,402.51	1,597.49	84%
Totals	\$ 20,000.00	\$ 14,785.05	\$ 5,214.95	74%

Total Subcontracts Budget	\$ 10,000.00	
Equus 22-04	\$ 10,000.00	
Contract Obligations	TOTAL \$ 10,000.00	
Unobligated Balance	\$ -	Remaining Unobligated

Grant Name/No.:		City of Vancouver CDBG Childcare Partnership		14-218/906	
Effective Dates:		8/1/22 - 6/30/23			
Agency/Contact:		City of Vancouver		Term:	11 months
		12/31/2022			
			45% of Term		
Line Item Expense		Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Subcontract		\$ 40,000.00	-	40,000.00	0%
Totals		\$ 40,000.00	\$ -	\$ 40,000.00	0%

Total Subcontracts Budget

\$ 40,000.00

Equus 22-28

\$ 40,000.00

Contract Obligations

TOTAL

\$ 40,000.00

Unobligated Balance

\$ -

Remaining Unobligated



Grant Name/No.:	Career National DW Grant			22-60315
Effective Dates:	7/1/22 - 6/30/23			
Agency/Contact:	Worksystems, Inc.		Term:	12 months
Grant to be extended one year	12/31/2022	50% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %
Personnel	\$ 25,234.00	4,010.04	21,223.96	16%
Operating	\$ 3,040.00	153.49	2,886.51	5%
Subcontractor	\$ 434,648.00	56,835.77	377,812.23	13%
Indirect	\$ 27,518.00	4,580.99	22,937.01	17%
Totals	\$ 490,440.00	\$ 65,580.29	\$ 424,859.71	13%

Total Subcontracts Budget		\$ 434,648.00	
Equus 22-17 Career DWG		\$ 424,648.00	
Contract Obligations	TOTAL	\$ 424,648.00	
	Unobligated Balance	\$ 10,000.00	IFA/RSA
		\$ -	Remaining Unobligated

Grant Name/No.:		DOL SUMMERWORKS		CP-39459	
Effective Dates:		1/1/23 - 12/31/25			
Agency/Contact:		Department of Labor		Term:	36 months
		1/1/2023	0% of Term		
Line Item Expense	Grant Budget	Grant to Date Costs	Budget Balance	Spending %	
Personnel	\$ 126,248.00	-	126,248.00	0%	
Fringe Benefits	\$ 15,151.00	-	15,151.00	0%	
Travel	\$ 3,375.00	-	3,375.00	0%	
Supplies	\$ 2,298.00	-	2,298.00	0%	
Subcontractor	\$ 1,200,000.00	-	1,200,000.00	0%	
Indirect	\$ 152,928.00	-	152,928.00	0%	
Totals	\$ 1,500,000.00	\$ -	\$ 1,500,000.00	0%	

Total Subcontracts Budget	\$ 1,200,000.00	
	\$ -	
Contract Obligations	TOTAL \$ -	
Unobligated Balance	\$ 1,200,000.00	
	\$ -	Remaining Unobligated



# workforce

## SOUTHWEST WASHINGTON

Subrecipient Contract Performance Reports  
Quarter Ending 12/31/2022  
Q2 – Program Year 2022

1

2

## WIOA TITLE I - Youth

Equus 22-10 Clark  
Jul 2022 – Jun 2023

1

## Contract Budgeted Funding

Personnel \$387,656  
Operating \$31,813  
Basic Ed/Life \$56,220  
Participant \$228,000  
Other \$133,890  
TOTAL \$837,580

2

## Contract Notes

Funding does not expire



3

3

## WIOA TITLE I - Youth

Clark County  
Equus (22-10)  
Jul 2022 – June 2023

Metric	Total Contract Performance	Total Actual Performance to Date	Q2 Performance	Expected to Date (End Q2)	Expected Performance Achieved	Total Performance Achieved
New Enrolled Youth	127	49	24	54	43%	38%
Exits to Post Secondary/ Employment	94	1	0	46	49%	1%
Exits w/GED or Diploma*	36	1	1	18	50%	3%

## Comments:

- WSW staff met with Clark College to develop a better partnership, and are spending time in Q3 developing a "Future Penguins" mentoring program for Clark College students to mentor Next participants
- WSW and Next staff are also developing a broader mentoring program that will be able to support all participants, beyond those interested in post-secondary education
- Council for the Homeless is piloting being on-site at Next regularly each week to offer supports for houseless and low-income participants

4

4

## WIOA TITLE I - Youth

Equus 22-11 Cowlitz & Wahkiakum  
Jul 2022 – Jun 2023

1

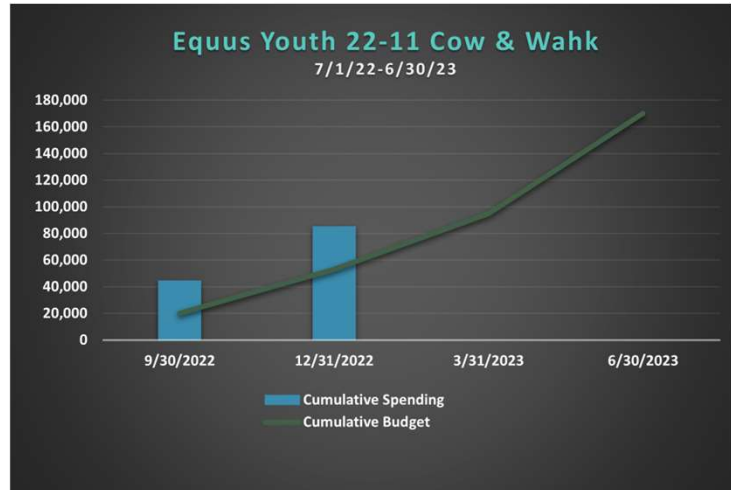
### Contract Budgeted Funding

Personnel \$80,764  
Operating \$6,249  
Basic Ed/Life \$13,779  
Participant \$45,176  
Other \$24,042  
TOTAL \$170,010

2

### Contract Notes:

Funding does not expire



5

5

## WIOA TITLE I - Youth

Equus (22-11) Cowlitz & Wahkiakum  
Jul 2022 – Jun 2023

Metric	Total Contract Performance	Total Actual Performance to date	Q2 Performance	Expected to Date (End Q2)	Expected Performance Achieved	Total Performance Achieved
New Enrolled Youth	34/4	4/0	0/0	14/2	41%/50%	12%/0%
Exits to Post Secondary/Employment	24/4	7/0	3/0	12/0	50%/0%	29%/0%
Exits w/GED or Diploma	12/1	2/0	0/0	6/0	50%/0%	17%/0%

### Comments:

- All enrollments & exits are from Cowlitz County—still struggling with engagement in Wahkiakum County
- Next staff are focused on increasing visibility in Cowlitz & Wahkiakum counties by attending more in-person events such as hiring fairs, resource fairs, etc.

6

6

## WIOA TITLE 1 - Youth

Goodwill (22-12)  
Jul 2022 – Jun 2023

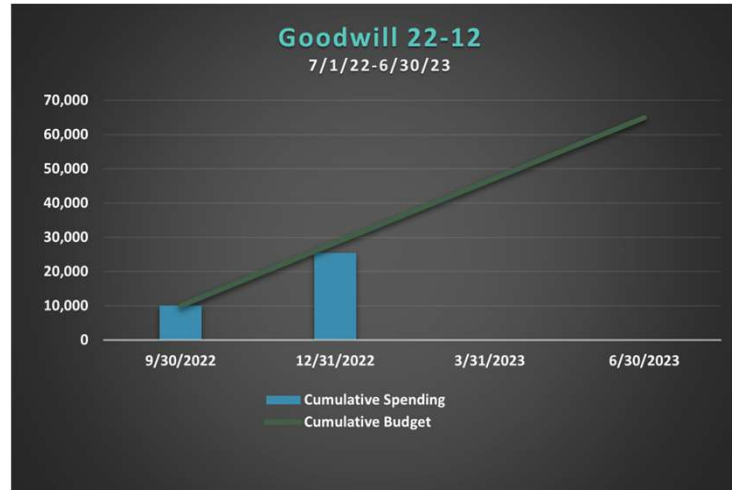
### 1 Contract Budgeted Funding

Operating \$1,450  
Participant \$54,720  
Indirect \$8,755  
TOTAL \$ 64,925

### 2 Contract Notes:

Contract executed August 2022

Funding does not expire.



7

7

## WIOA TITLE 1 - Youth

Goodwill (22-12)  
Jul 2022 – Jun 2023

Metric	Total Contract Performance	Q2 Performance	Expected to Date (End Q2)	Total Performance Achieved
WEX Placement (Cow)	25	1	11	24%
WEX Site Development (Cow)	10	1	4	60%
WEX Placement (Wah)	3	0	1	0%
WEX Site Development (Wah)	2	0	1	50%

### Comments:

- For their WEX placement, Goodwill partnered with Grizzly Shakes, a business located inside the Ascent Youth Center in Longview
- Goodwill's Business Development Specialist left, and their supervisor was able to cover the role for the majority of Q2
- This contract is dependent on WEX referrals from WIOA Title 1 Youth in Cowlitz and Wahkiakum, which have been low

8

8

## WIOA TITLE I - Adult - Clark

Career Team (22-21)  
Oct 2022 – Sep 2023

1

### Contract Budgeted Funding

Personnel \$210,966  
Operating \$55,065  
Indirect \$26,603  
Mgmt Fee \$26,603  
Participant Support: 119,360  
TOTAL: \$438,597

2

### Contract Notes:

Contract executed October 2022

Funding does not expire.



9

9

## WIOA TITLE I - Adult - Clark

Career Team (22-21)  
Oct 2022 – Sep 2023

Metric	Oct- Dec 2022	Jan – Mar 2023	Apr – Jun 2023	Jul-Sept. 2023
New Enrolled Adults	220			
Exits to Employment	16			

### Comments:

CareerTeam is the new service provider co-located at WorkSource and established their protocols and service delivery model this quarter. WSW expects that performance will pick up as co-enrollments and trainings begin in the following quarter.

10

10

## WIOA TITLE I - Adult - Cowlitz/Wahkiakum

Career Team (22-21)  
Oct 2022 - Sep 2023

1

### Contract Budgeted Funding

Personnel \$67,774  
Operating \$4,717  
Indirect \$7,249  
Mgmt Fee \$7,249  
Participant Support \$34,524  
TOTAL \$121,513

2

### Contract Notes:

Contract executed October 2022

Funding does not expire.



11

11

## WIOA TITLE I - Adult -Cowlitz/Wahkiakum

Career Team (22-21)  
Oct 2022 - Sep 2023

Metric	Oct- Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul-Sept. 2023
New Enrolled Adults	83			
Exits to Employment	16			

### Comments:

CareerTeam is the new service provider co-located at WorkSource and established their protocols and service delivery model this quarter. WSW expects that performance will pick up as co-enrollments and trainings begin in the following quarter.

12

12



## WIOA TITLE I - Dislocated Worker - Clark

Career Team (22-21)  
Oct 2022 - Sep 2023

1

### Contract Budgeted Funding

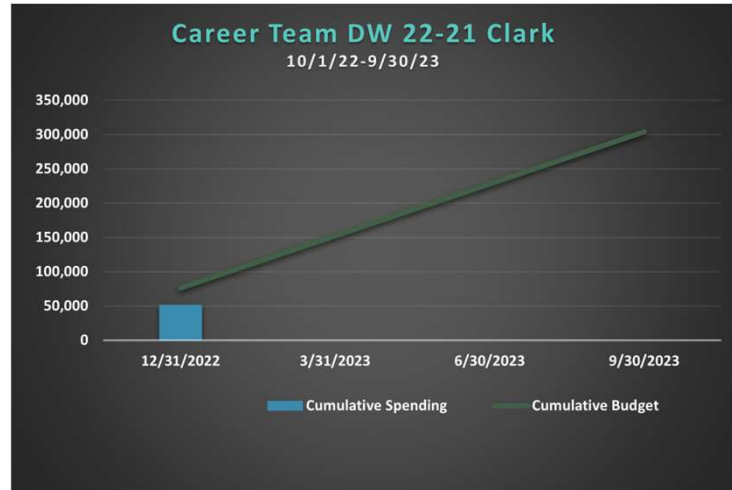
Personnel \$149,998  
Operating \$37,153  
Indirect \$18,715  
Mgmt Fee \$18,715  
Participant Support \$79,362  
TOTAL \$303,943

2

### Contract Notes:

Contract executed October 2022

Funding does not expire.



13

13

## WIOA TITLE I - Dislocated Worker - Clark

Career Team (22-21)  
Oct 2022 - Sep 2023

Metric	Oct- Dec 2022	Jan - Mar 2023	Apr - Jun 2023	Jul-Sept. 2023
New Enrolled Dislocated Workers	312			
Exits to Employment	13			

### Comments:

CareerTeam is the new service provider co-located at WorkSource and established their protocols and service delivery model this quarter. WSW expects that performance will pick up as co-enrollments and trainings begin in the following quarter.

14

14

## WIOA TITLE I - Dislocated Worker – Cowlitz/Wahkiakum

Career Team (22-21)  
Oct 2022 – Sep 2023

1

### Contract Budgeted Funding

Personnel \$47,842  
Operating \$3,254  
Indirect \$5,110  
Mgmt Fee \$5,110  
Participant Support \$23,969  
TOTAL \$85,285

2

### Contract Notes:

Contract executed October 2022.

Funding does not expire.



15

15

## WIOA TITLE I - Dislocated Worker – Cowlitz/Wahkiakum

Career Team (22-21)  
Oct 2022 – Sep 2023

Metric	Oct- Dec 2022	Jan – Mar 2023	Apr – Jun 2023	Jul-Sept. 2023
New Enrolled Dislocated Workers	66			
Exits to Employment	4			

### Comments:

CareerTeam is the new service provider co-located at WorkSource and established their protocols and service delivery model this quarter. WSW expects that performance will pick up as co-enrollments and trainings begin in the following quarter.

16

16

## WIOA TITLE I - Adult/Dislocated Worker – Cowlitz/Wahkiakum

Love Overwhelming (22-23)  
Oct 2022 – Sep 2023

1

### Contract Budgeted Funding

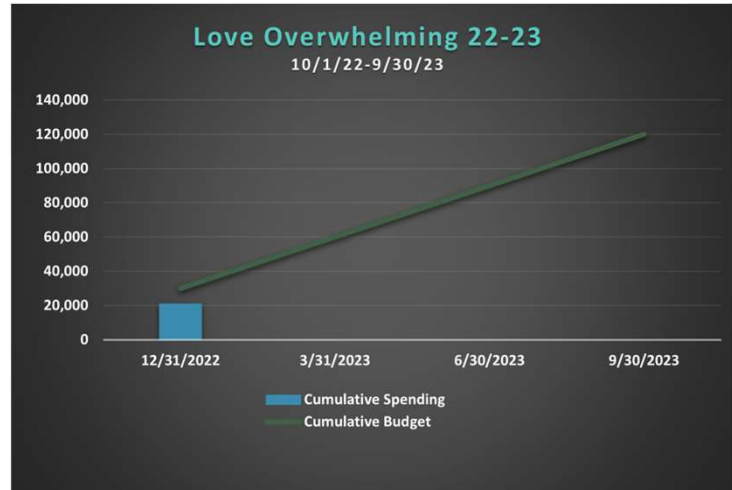
Personnel \$98,000  
Operating \$22,000  
TOTAL \$120,000

2

### Contract Notes:

Contract executed October 2022.

Funding does not expire.



17

17

## WIOA TITLE I - Adult/Dislocated Worker - Cowlitz/Wahkiakum

Love Overwhelming (22-23)  
Oct 2022 – Sep 2023

Metric	Oct- Dec 2022	Jan – Mar 2023	Apr – Jun 2023	Jul-Sept 2023
New Enrolled Adult/Dislocated Workers	0			
Referrals to WorkSource	11			

### Comments:

Love Overwhelming is a new referral and service provider partner, and established their protocols and service delivery model this quarter. WSW expects that performance will pick up as co-enrollments and trainings begin in the following quarter.

18

18

## COVID-19 Disaster Relief

Equus (20-09)  
Jul 2020 – Jun 2023

1

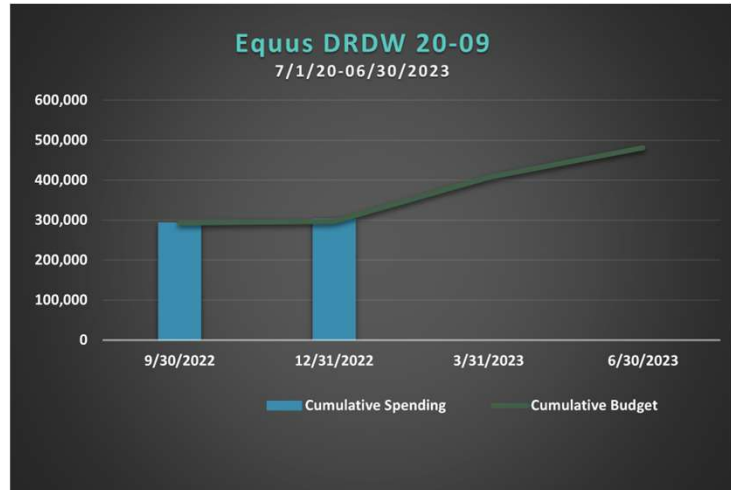
### Contract Budgeted Funding

Personnel \$457,409  
Operating \$2,109  
Indirect \$9,745  
Mgmt Fee \$11,455  
TOTAL \$480,718

2

### Contract Notes:

Funding expires 6/30/23



19

19

## COVID-19 Disaster Relief

Equus (20-09)  
Jul 2020 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 03/22	Performance Achieved
Participants in Disaster Relief Employment	42	11	11	381%
Participants in Career + Training Services	41	15	15	273%
Participants Exiting	23	25	25	92%
Participants Exit to Employment	20	10	10	200%

Comments:

No concerns.

20

20

## WIOA TITLE 1- Youth

Equus SummerWorks (22-14)  
Aug 2022 – Dec 2023

1

### Contract Budgeted Funding

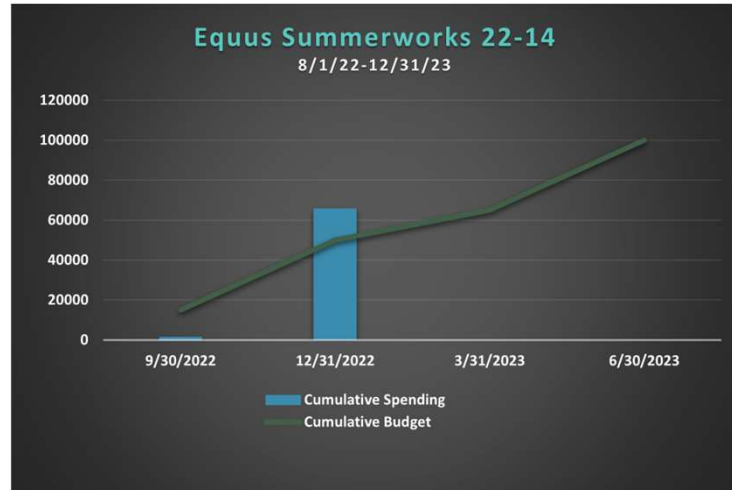
Personnel \$69,625  
Operating \$4,610  
Participant \$190,234  
Indirect \$35,531  
TOTAL \$300,000

2

### Contract Notes:

\$50K Funded by JP Morgan Chase Foundation

Title 1 Youth Funding does not expire



21

21

## WIOA TITLE 1- Youth

Equus SummerWorks (22-14)  
Aug 2022 – Dec 2023

Metric	Total to Date	Expected to Date	Expected by 12/23	Performance Achieved
# of Youth who have completed Workplace Readiness Workshops	10	27	50	20%
# of Youth who have completed Job Shadows and Informational Interviews	0	22	50	0%
# of youth who have completed 100-hour work-based learning experiences	10	32	50	20%
# of youth who exit to post-secondary or employment	0	22	50	0%

### Comments:

- WSW staff are working closely with Equus leadership to address the challenges encountered in the Fall and ensure youth have the opportunity to complete the job shadow and informational interview components of the program especially.
- The participant recruitment/enrollment challenges that are impacting Next's programming overall are also impacting youth placement into SummerWorks internships.

22

22

## Key Bank/COV - Fourth Plain Navigator

Equus Fourth Plain Navigator (22-04)  
Jul 2022 – Mar 2023

1

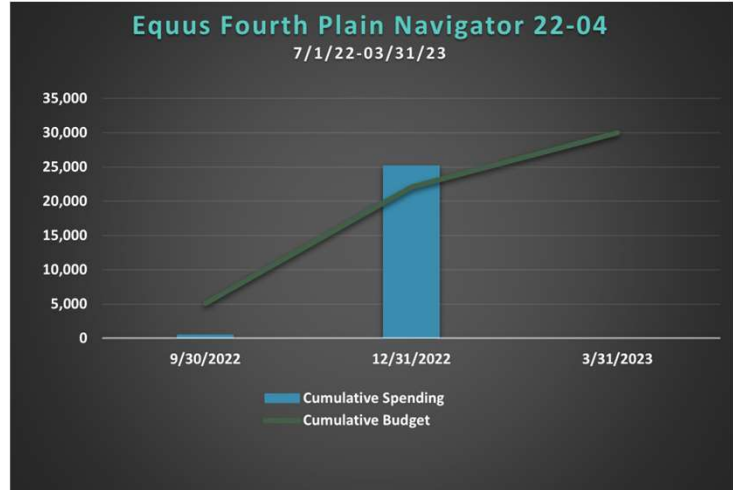
### Contract Budgeted Funding

Personnel \$23,514  
Operating \$1,154  
Indirect \$2,605  
Mgmt Fee \$2,727  
TOTAL \$30,000

2

### Contract Notes:

Funded by:  
\$10K City of Vancouver  
\$20K Key Bank



23

23

## Key Bank/COV - Fourth Plain Navigator

Equus Fourth Plain Navigator (22-04)  
Jul 2022 – Mar 2023

Metric	Total to Date	Expected to Date	Expected by 03/31	Performance Achieved
Small Businesses Engaged	26	20	30	87%
Enrolled Residents	0	5	10	0%
Referred Residents	26	25	50	52%

### Comments:

- WSW modified the contract to extend till March 2023.
- Members of the WSW team met with the Fourth Plain Forward & Next leadership to ensure a strong coordinated effort to outreach and address any necessary changes.
- Next staff will be utilizing their Business Development Specialist's time to take over work with businesses so that the Talent Development Specialists can focus on enrolling residents.
- Fourth Plain Forward has asked Next staff to permanently co-locate at their location even after the contract ends.

24

24

## Career National Dislocated Worker via Worksystems

Equus Career NDWG (22-17)  
Jul 2022 – Jun 2023

1

### Contract Budgeted Funding

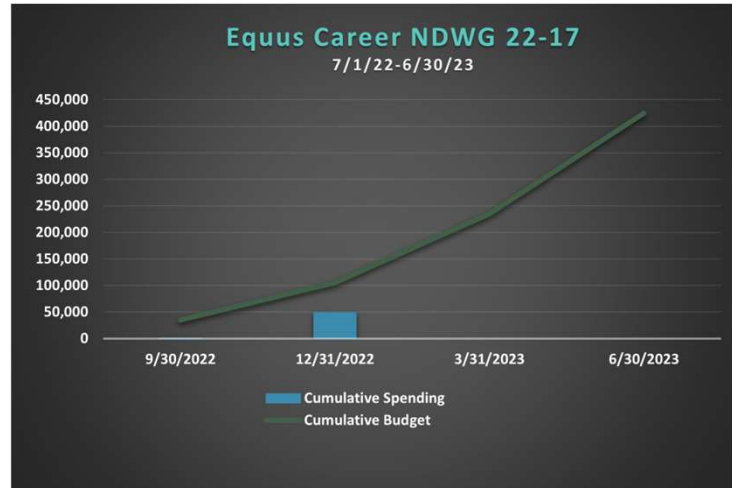
Personnel \$116,904  
Operating \$9,540  
Indirect \$13,188  
Participant Exp \$273,053  
Mgmt Fee \$13,963  
TOTAL \$424,648

2

### Contract Notes:

Regional Grant from Department  
of Labor

Contract executed 8/26/22



25

25

## Career National Dislocated Worker via Worksystems

Equus Career NDWG (22-17)  
Jul 2022 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 06/23	Performance Achieved
Eligible participants receiving childcare assistance	3	12	30	10%
Employment at exit and retained through Q2 after exit	0	8	21	0%
Employment rate Q4 after exit	0	9	22	0%
Median Earnings Q2 after exit \$8,300				
Participants completing training and obtaining credential	0	7	18	0%
Participants enrolled in training earning a measurable skills gain	3	5	14	0%
Participant Feedback				
When asked, 75% or more participants say they are satisfied with their experience	0	9	22	0%
When asked, 75% or more participants say they felt respected, included, and heard	0	9	22	0%
When asked, 75% or more participants say training and services were relevant, meaningful, or valuable	0	9	22	0%

**Comments:** Enrollments have been off to a slow start throughout the CWWC region (7 total; 3 from SW WA). Worksystems is applying for a no-cost extension from DOL, which should extend the period of performance for an additional 12 months. The programs are now getting a bit of momentum and we expect to see enrollments grow in the coming months.

26

26

## One Stop Operator – Clark\*

Equus (22-24)  
Oct 2022 – Sep 2023

1

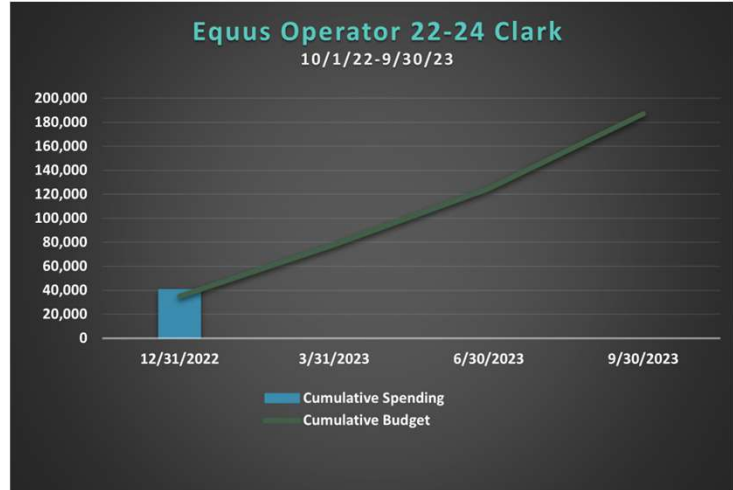
### Contract Budgeted Funding

Personnel \$141,773  
Operating \$12,765  
Indirect \$16,118  
Mgmt Fee \$ 17,065  
TOTAL \$187,721

2

### Contract Notes:

Funding does not expire



27

\* Contract is partially supported by contributions via the WorkSource MOU/Infrastructure Funding agreement

27

## One Stop Operator - Cowlitz/Wahkiakum\*

Equus (22-24)  
Oct 2022 – Sep 2023

1

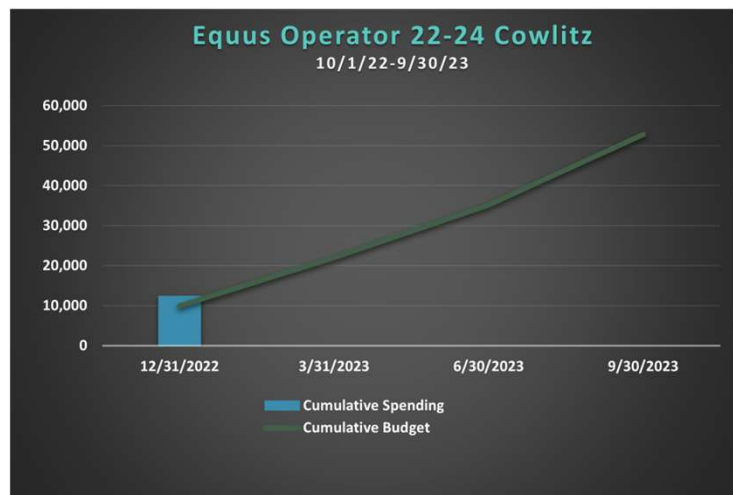
### Contract Budgeted Funding

Personnel \$39,482  
Operating \$3,554  
Indirect \$4,489  
Mgmt Fee \$ 4,754  
TOTAL \$52,279

2

### Contract Notes:

Funding does not expire



28

\* Contract is partially supported by contributions via the WorkSource MOU/Infrastructure Funding agreement

28



## One Stop Operator - All Counties

Equus (22-24)  
Oct 2022 – Sep 2023

Strategy	Metric	Process
Co-Enrolled adults across the system	At least 60% co-enrolled adults into Title I and Title III across the system	40% in December 2022
Placement into Employment	300 job seekers placed into quality jobs.	1 placement from the Launchpad qualified talent pool in Q1
Launchpad is used to place job seekers quickly into quality jobs	Develop a process that is effective and sustainable throughout the WorkSource system and the integrated service delivery model to make entry of qualified job seekers into Launchpad a priority.	Eight new Launchpad users received training throughout WorkSource and Next in Q1 and two users received refresher training. The use of launchpad will begin to increase as Equus and Career Team become fully staffed and trained.
Increased Focus on Priority and Target Populations	Engagement with preferred partners and clear strategies for serving diverse customers. Based on the strategy developed from the evaluative report.	The centers are focused on re-engaging partners and strengthening relationships. Topics that are regularly brought up, point to a need for improved and streamlined referral processes, an ask for more WorkSource informational material and increased frequency in communication.
Outreach	<ul style="list-style-type: none"> <li>100% of materials follow WorkSource branding guidelines</li> <li>Minimum quarterly email to UI/SNAP lists</li> <li>On or before December 1, 2022, the Operator will deliver to WSW a first draft of a center wide outreach strategy to include promotion and outreach of all WorkSource services and programs, no matter which partner is providing them.</li> </ul>	Sending monthly "E-Blasts" UI lists. The SNAP list outreach has been minimal due to personnel and bandwidth. WorkSource has begun posting to all social media channels daily, utilizing both organic and tactics to boost our reach. An Outreach plan has been developed and will roll out to all staff in Q2. The plan prioritizes expanding reach, supporting priority populations and partners that serve them, in addition to increasing brand awareness.
WorkSource Strategic Plan	Lead WorkSource Strategic Plan Update – Completed by June 30, 2023	
Customer Satisfaction	Create multiple customer feedback loops to gather customer satisfaction data – Minimum 95% customer satisfaction rate	80.37% of customers who responded to the survey where either very satisfied or somewhat satisfied in Q1. Only ~5% of customers responded that they were somewhat dissatisfied or very dissatisfied.

29

29

## One Stop Operator - All Counties

Equus (22-24)  
Oct 2022 – Sep 2023

Comments: WorkSource SW Washington has been full of transition, evaluation, and "laying the foundation" with a new leadership team. The centers welcomed a new Title I partner, Career Team to the system, celebrated successes of our Administrator as they moved up to ESD's Southwest Coastal Regional Director and continued to onboard new staff while equipping existing staff with improved processes.

The new leadership is learning all areas within the one-stop system and continue to discover areas of opportunity around Integrated Service Delivery, the customer experience, and partnership development practices. While projects within the center have been slow moving, they have been thorough.

WorkSource Vancouver – Virtual services account for 61% of overall services and In Person 39%.  
WorkSource Kelso – Virtual services account for 50% of overall services and In Person 50%.

30

30

## THRIVE – State EcSA

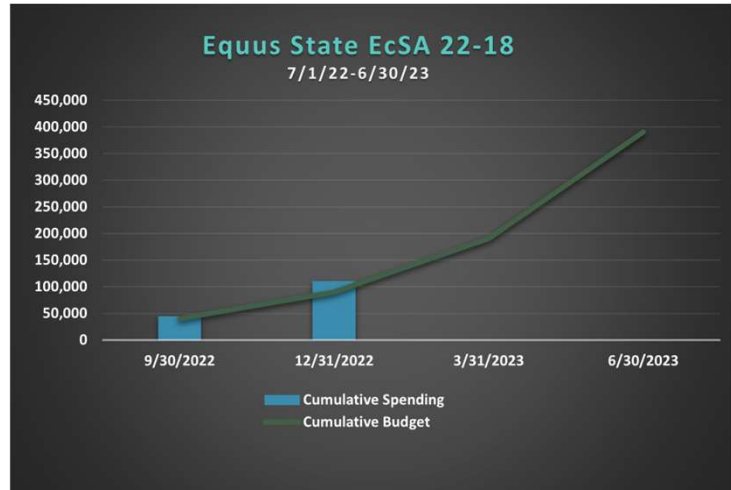
Equus (22-18)  
Jul 2022 – Jun 2023

### 1 Contract Budgeted Funding

Personnel \$210,909  
Operating \$16,580  
Participant \$113,771  
Indirect \$49,174  
TOTAL \$390,434

### 2 Contract Notes:

State General Funds



31

31

## THRIVE – Federal EcSA

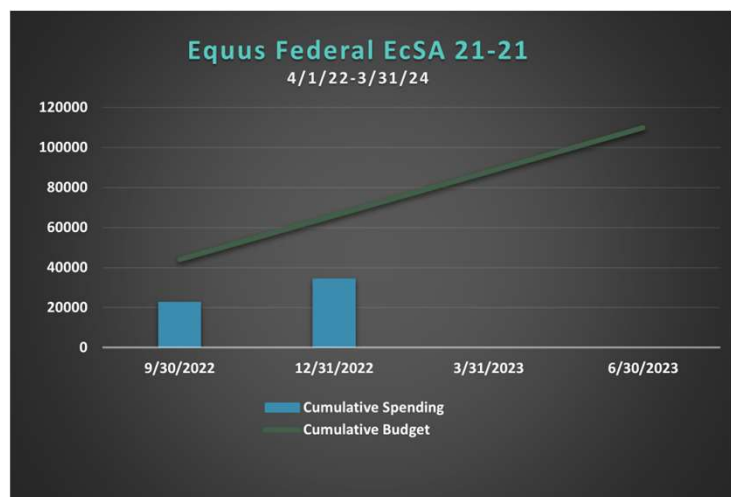
Equus (21-21)  
Apr 2022 – Mar 2024

### 1 Contract Budgeted Funding

Personnel \$106,447  
Operating \$5,350  
Participant Exp 40,000  
Indirect \$11,660  
Mgmt Fee \$12,343  
TOTAL \$175,803

### 2 Contract Notes:

WIOA Funding



32

32

THRIVE – State + Federal EcSA

Equus (22-18)  
Jul 2022 – Jun 2023/Mar 2024

Metric	Total to Date	Expected to Date	Performance Achieved
Enrollments	257	281	91%
Exit to Full-Time Employment at or above \$34,480	79	110	72%
Exit to Continuing Subsidized Training	28	83	34%

Comments:

Thrive partners have reconvened for regular meetings to collaborate and coordinate resources to support eligible participants of Thrive. Current partners include Lower Columbia College, CAP, Goodwill, Love Overwhelming and DSHS.

Priority has been set for training enrollments, employment placements and general outreach.

Currently modifying State contract to include an additional Service Component-Vocational Education for State Thrive. This will allow more participants to attend subsidized trainings.

33

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34

## EET – Clark County Juvenile Court

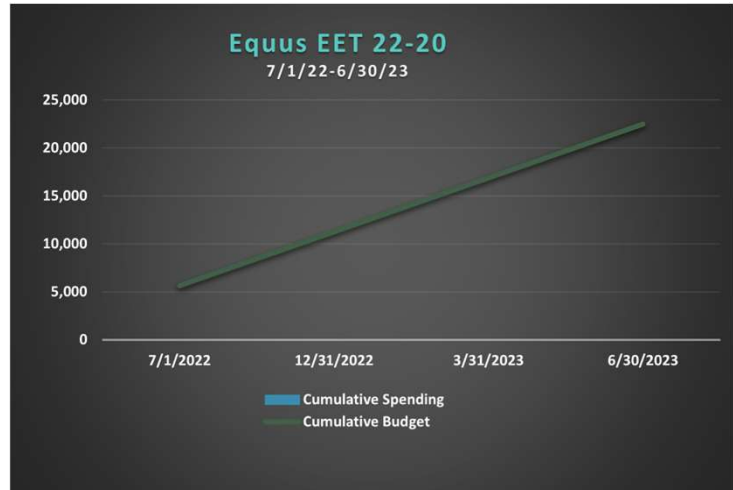
Equus (22-20)  
Jul 2022 – Jun 2023

### 1 Contract Budgeted Funding

Pay for Performance  
TOTAL \$22,500

### 2 Contract Notes:

\$0 Spending



35

35

## EET Clark County Juvenile Court

Equus (22-20)  
Jul 2022 – Jun 2023

### Comments:

- EET is a pay-for-performance based contract. Referrals must come from Clark County Juvenile Court (CCJC), the grantor, for Next/ Equus to then place them into a WEX.
- Next has placed no EET participants so far.
- CCJC has communicated that they have low participant numbers and don't have many referrals, and this is of no fault of the contractor.
- WSW staff have been in consistent communication with CCJC and PIC, who holds a similar contract, to see how the programs can collaborate. Next has communicated an effort to leverage WIOA Title 1 Youth funds to assist PIC with any business connections they need for participant placement.

36

36

## COVID-19 Economic Recovery + Opioid Disaster Recovery- Clark

Equus (20-11)  
Nov 2020 – Feb 2023

1

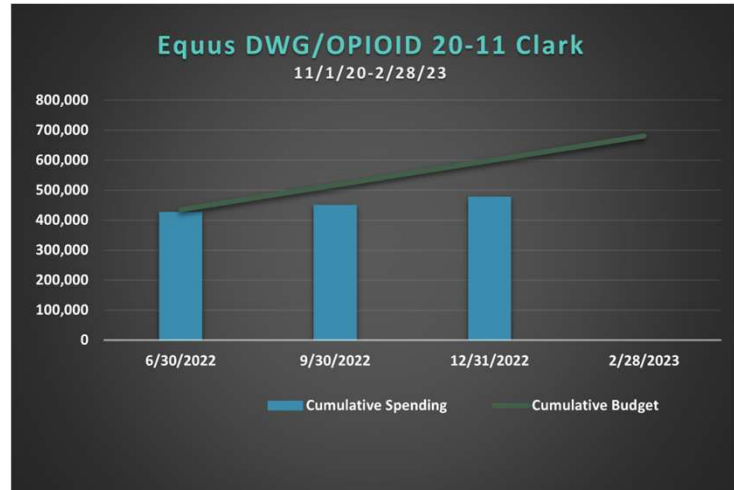
### Contract Budgeted Funding

Personnel \$248,175  
Operating \$13,401  
Participant \$363,719  
Indirect \$26,686  
Mgmt Fee \$28,008  
TOTAL \$ 679,989

2

### Contract Notes:

Contract due to be extended to 6/30/23.



37

37

## COVID-19 Economic Recovery + Opioid Disaster Recovery- Cowlitz/Wahkiakum

Equus (20-11)  
Nov 2020 – Feb 2023

1

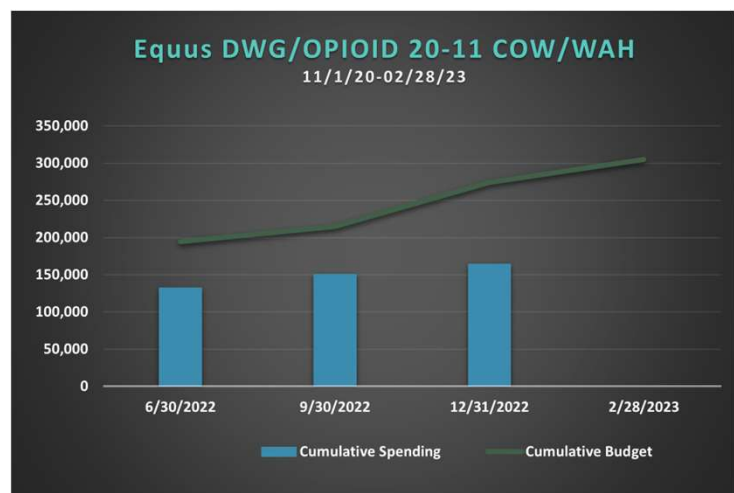
### Contract Budgeted Funding

Personnel \$111,839  
Operating \$5,968  
Participant \$162,592  
Indirect \$11,994  
Mgmt Fee \$12,530  
TOTAL \$304,921

2

### Contract Notes:

Contract due to be extended to 6/30/23.



38

38

# COVID-19 Economic Recovery + Opioid Disaster Recovery- SW WA

Equus (20-11)  
Nov 2020 – Feb 2023

Metric	Total to Date	Q2 Oct. – Dec. 22	Expected to Date	Performance Achieved
Total Planned Participants	283	50	183	154%
Participants in Career + Training Services	367	-	123	298%
Participants Receiving Training Services	62	-	48	129%
Participants Exit to Employment	118	24	80	148%

Comments:

No concerns.

39

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## CBDG – Corona Virus Response

Equus (21-09)  
Oct 2021 – Jun 2023

1

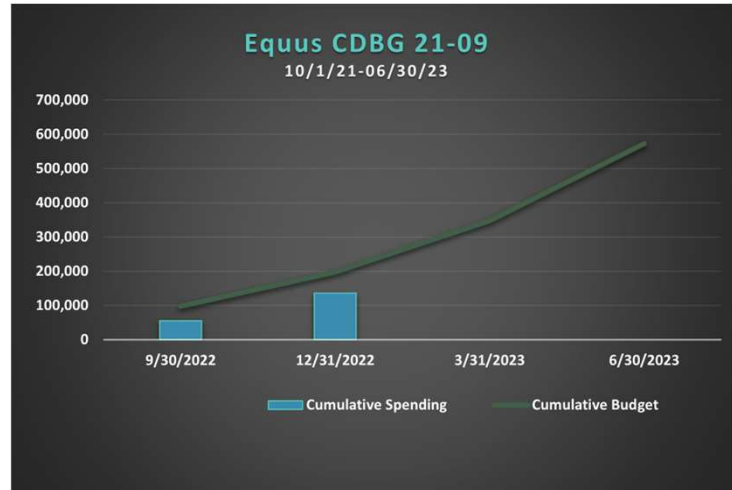
### Contract Budgeted Funding

Personnel \$75,184  
Operating \$4,011  
Indirect \$7,737  
Mgmt Fee \$8,693  
Participant \$477,599  
TOTAL \$573,224

2

### Contract Notes:

Funding extended to  
June 30, 2023



41

41

## CDBG – Corona Virus Response

Equus (21-09)  
Oct 2021 – June 2023

Metric	Total to Date	Expected to Date*	Expected by 06/23*	Performance Achieved
Participants	109	100	100	109%
Entering Employment	18	40	40	45%
Life Skills	21	50	50	42%
Job Search Training	64	50	50	128%

Comments:

Expenditures will pick up in the next quarter due to a contract modification and increased flexibility.

42

42

## City of Vancouver - CBDG

Equus (22-28)  
Oct 2022 – Jun 2023

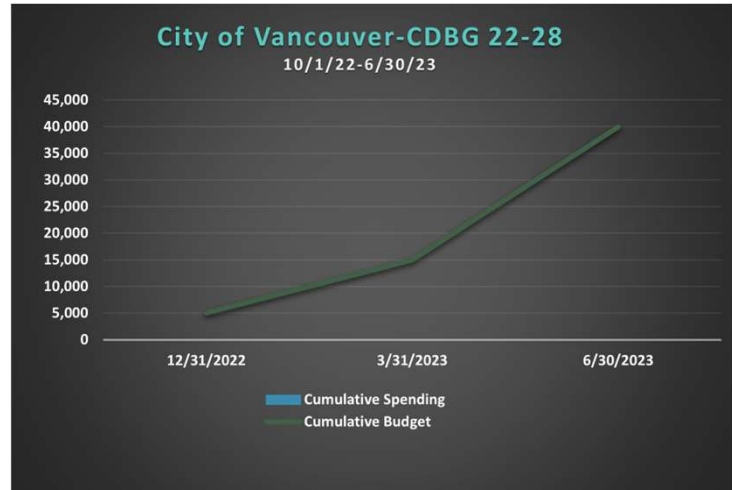
1

Contract Budgeted Funding  
Support Services /  
Participant Reimbursements  
(BFET)(LS-JST) \$40,000  
TOTAL \$40,000

2

Contract Notes:

Contract Executed 12/20/22



43

43

## City of Vancouver - CDBG

Equus (22-28)  
Oct 2022 – June 2023

Metric	Total to Date	Expected to Date	Expected by 06/23	Performance Achieved
Participants	0	2	8	0%
Entering Employment	0	0	5	0%
Life Skills	0	2	5	0%
Job Search Training	0	0	3	0%

### Comments:

- Contract was not signed until late Q2
- WSW has provided technical assistance and held meeting time to answer any questions as this contract gets started
- During Q3 WSW will be holding BFET Provider's meetings with all BFET partners to increase co-enrollments, benefiting this contract

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## WIOA TITLE 1 - Incumbent Worker Training

Equus (21-11)  
Oct 2021 - Jun 2023

1

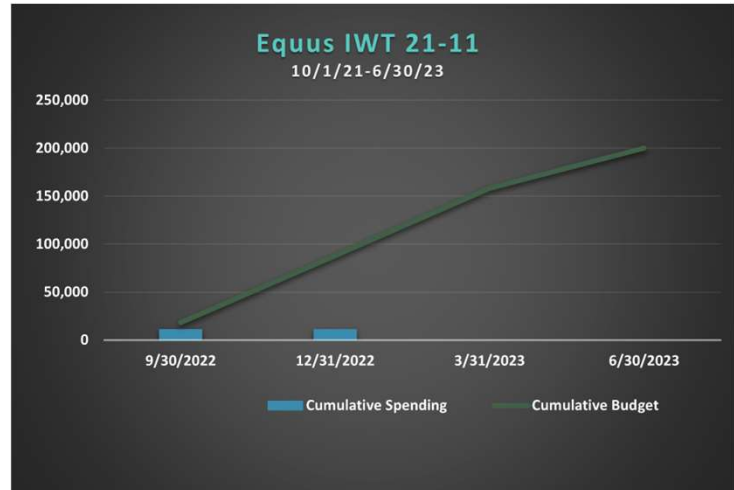
### Contract Budgeted Funding

Personnel \$79,608  
Operating \$3,210  
Indirect \$8,091  
Mgmt Fee \$9,091  
Participant \$100,000  
TOTAL \$200,000

2

### Contract Notes:

WIOA Adult and Dislocated  
Worker Funding-Does not  
expire



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## WIOA TITLE 1 - Incumbent Worker Training

Equus (21-11)  
Oct 2021 - June 2023

Employers Approved for IWT					
Name	NAICS code	# of employees	Type of Training	Completion Date	Pay Increase
Greater Vancouver Chamber (GVC)	813 Religious, Grantmaking, Civic, Professional, and Similar Organizations	1	Institute for Organization Management Certification	06/2023	Yes, 10%
Koelsch Communities	623 – Nursing & Residential Care Facilities	22	Humanitude Dementia Care	01/2023	Yes, 3.6%

### Comments:

WSW's incumbent worker program is generating a lot of interest from the business community! We currently have three additional proposals in the pipeline and expect to fully obligate the remaining funds in the next 30 days.

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## WIOA TITLE 1– System Liaison

Wahkiakum Health & Human Services (22-08)  
Jul 2022 – Jun 2023

1

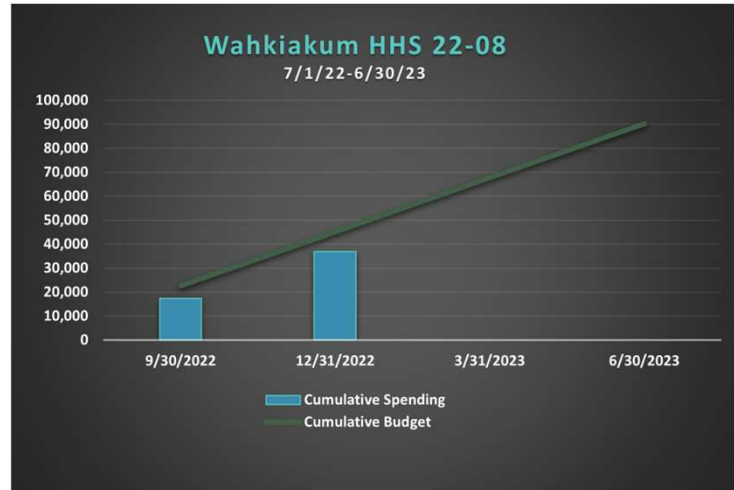
### Contract Budgeted Funding

Personnel \$83,269  
Operating \$7,000  
TOTAL \$90,269

2

### Contract Notes:

WIOA Funding – does  
not expire



47

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## WIOA TITLE 1– System Liaison

Wahkiakum Health & Human Services (22-08)  
Jul 2022 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 6/23	Performance Achieved
Qualified customers ready to seek employment entered into Launchpad	8	10	21	38%
Customers referred to WorkSource for additional training and work experience	2	14	29	7%

### Comments:

- A staff transition in the System Liaison contract funded role occurred during Q2. The new System Liaison started on November 1, 2022, and has done an outstanding job of getting up to speed
- The new System Liaison has been doing a great deal of outreach and has even purchased ads in the local paper to help ensure the community is aware of Employ Wahkiakum. We anticipate performance numbers at the end of Q3 will be much stronger based on the updates the System Liaison has provided.
- While WorkSource referrals have been a challenge, the new System Liaison is working closely with WorkSource and Next staff to develop a plan for them to be able to utilize her office space on Mondays so they can be present in-person in Wahkiakum County.

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## WIOA TITLE 1- System Liaison

WSU Vancouver (22-09)  
Jul 2022 – Jun 2023

1

### Contract Budgeted Funding

Personnel \$88,824  
Operating \$3,088  
Indirect \$33,088  
TOTAL \$125,000

2

### Contract Notes:

WIOA Funding – does not expire



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## WIOA TITLE 1- System Liaison

WSU Vancouver (22-09)  
Jul 2022 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 06/23	Performance Achieved
Qualified students ready to seek employment entered into Launchpad	50	40	105	48%
Diverse students engaged and entered into Launchpad	31	11	38	82%
Students referred to WorkSource for additional training and/or work experience	8	15	45	18%
Diverse students referred to WorkSource	1	6	14	7%

### Comments:

- A new staff member joined the Career Action Center team in December 2022, which means the System Liaison will no longer be the only full-time career services staff member on the Vancouver campus.
- During Q2, the System Liaison conducted a total of 30 student employment support appointments, delivered 8 workshops/presentations, and engaged 49 employers through career fairs and/or panel events.

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## WIOA TITLE 1- System Liaison

Lower Columbia College (22-07)  
Jul 2022 – Jun 2023

1

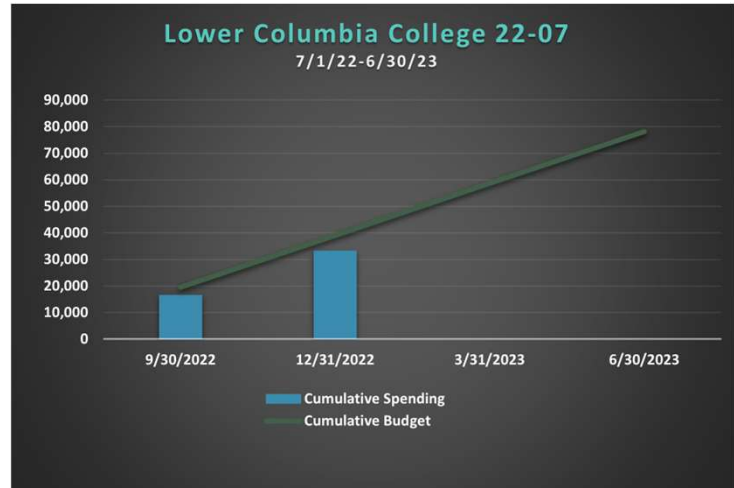
### Contract Budgeted Funding

Personnel \$75,119  
Operating \$1,000  
Indirect \$2,081  
TOTAL \$78,200

2

### Contract Notes:

WIOA Funding – does not expire



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## WIOA TITLE 1- System Liaison

Lower Columbia College (22-07)  
Jun 2022 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 06/23	Performance Achieved
Qualified students ready to seek employment entered into Launchpad	41	16	56	73%
Diverse students engaged and entered into Launchpad	30	9	23	130%
Students referred to WorkSource for additional training and/or work experience	23	16	56	41%
Diverse students referred to WorkSource	11	9	23	48%

### Comments:

- The System Liaison conducted a total of 69 student employment support meetings this quarter and helped place more than 12 individuals into full-time or part-time positions.
- Business engagement during Q2 was a bit light with only 3 businesses engaged, but the System Liaison will be helping coordinate a Career Fair in Q3 and anticipates business engagement will be higher moving forward.

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## WIOA TITLE 1-System Liaison

Clark College (21-04)  
Jan 2022 – Jun 2023

1

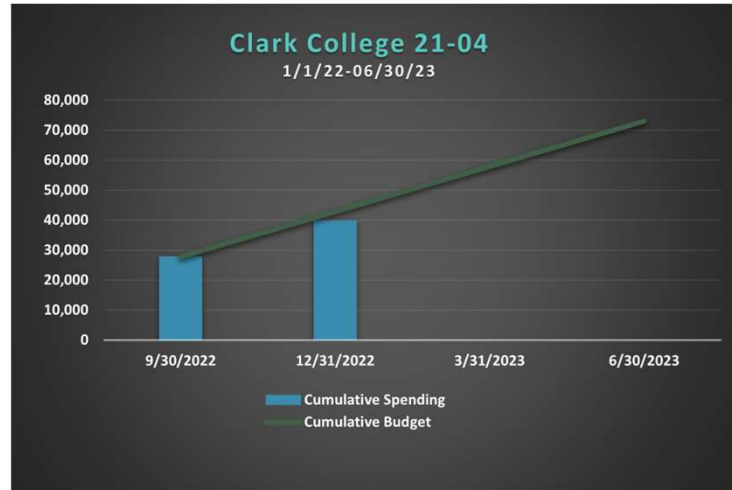
### Contract Budgeted Funding

Personnel \$59,549  
Operating \$6,440  
Indirect \$7,048  
TOTAL \$73,037

2

### Contract Notes:

WIOA Funding – does not expire



53

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## WIOA TITLE 1- System Liaison

Clark College (21-04)  
Jan 2022 – Jun 2023

Metric	Total to Date	Expected to Date	Expected by 06/23	Performance Achieved
Qualified students ready to seek employment entered into Launchpad	93	150	190	49%
Diverse students engaged and entered into Launchpad	72	101	127	57%
Students referred to WorkSource for additional training and/or work experience	17	52	66	26%
Diverse students referred to WorkSource	14	37	47	30%

### Comments:

- The System Liaison contract with Clark College was originally set to end in December 2022 but was modified and extended through the end of June 2023.
- The System Liaison conducted a total of 65 student employment support appointments and engaged 36 businesses during Q2.
- The system liaison is still struggling with referrals to WorkSource, mainly because the department wants to keep career support in house and the college already has a Workforce Education Services (WES) office that helps students get connected with funding.

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## Regular Board Meetings - JANUARY 2023 - DECEMBER 2023

- March 14, 2023 ([Zoom Conference Call](#)) 4-6 p.m.
- June 13, 2023 ([Workforce Southwest Washington, Vancouver](#)) 4-6 p.m.
- September 12, 2023 ([Zoom Conference Call](#)) 4-6 p.m.
- December 12, 2023 ([Workforce Southwest Washington, Vancouver](#)) 4-6 p.m.

## Special Board Member Events

WSW Executive Committee Spring Dinner

WSW Board of Directors Biennial Board of Directors Retreat

Holiday Reception – December 12, 2023 ([Workforce Southwest Washington](#)) 6 p.m.

### WSW Executive Committee

4th Wednesday of every month  
3:30-5:00 p.m.

Staff: CEO Miriam Halliday

*In-person unless otherwise noted*

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January 25, 2023 - ([Zoom](#))

February 15, 2023 - ([Zoom](#))

March 22, 2023

April 26, 2023 - ([Zoom](#))

May 24, 2023

June 28, 2023 - ([Zoom](#))

July 26, 2023 - ([Zoom](#))

August 23, 2023

September 27, 2023 - ([Zoom](#))

October 25, 2023

November 22, 2023 - ([Zoom](#))

December 27, 2023 - ([Zoom](#))

### WSW Finance Committee

By specific date as noted below  
4:00-5:30 p.m.

Staff: CFO Barri Horner

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February 15, 2023 - ([Zoom](#))

*Joint Finance & Executive Board Meeting  
(Auditors' Direct Report)  
(Q2 Reports)*

May 17, 2023 - ([Zoom](#))  
*(PY23 Draft Budget Review/  
Obligations)*

August 16, 2023 - ([Zoom](#))  
*(TBD)*

November 15, 2023 - ([Zoom](#))  
*(PY23 Draft Budget Revision Review/  
Obligations)*