



workforce
SOUTHWEST WASHINGTON

WSW Executive Committee Meeting
Zoom Conference Call
September 25, 2024
3:30 – 4:30 pm

3:30	<u>Welcome</u>	A.D. Simmons
3:40	<u>Consent Agenda</u> * <ul style="list-style-type: none">• Minutes & Contract Memo	A.D. Simmons
3:45	<u>Employee Handbook Revisions Memo</u> * <ul style="list-style-type: none">• Sabbatical Leave Program	Miriam Halliday
4:00	<u>CEO Update</u> <ul style="list-style-type: none">• Interstate Bridge Replacement Project• Digital Equity Statewide Grant Submission• Strategic Planning Dashboard• Washington Workforce Conference• Governor Visit – October 10th	Miriam Halliday
4:20	<u>Open Discussion / Other Items</u>	A.D. Simmons
4:30	<u>Adjourn</u>	A.D. Simmons

* - Action Required

NOTES



workforce
SOUTHWEST WASHINGTON

**WSW Executive Committee Meeting Minutes
August 14, 2024
3:30 p.m.
Zoom Conference Call**

Executive Committee Members Present: A.D. Simmons, Corey Giles, Monte Constable, Renny Christopher, Mark Tishenko, Adrienne Watson, Councilor Bowerman, and Ted Sprague.

Executive Committee Members Not Present: Paige Spratt.

Guests Present: Kim Sogge and Lisa Keohokalole Schauer.

Staff Members Present: CEO Miriam Halliday and Traci Williams.

WELCOME:

Chair A.D. Simmons opened the meeting at 3:31 p.m. and welcomed everyone in attendance.

APPROVALS:

Having reached quorum, Chair Simmons entertained a motion to approve the Consent Agenda, consisting of the Executive Committee minutes held on June 26, 2024, Contract Memo, Acknowledgement of PY23 One-Stop Annual Report, Finance Committee Charter, and Policy Memo containing; WSW Stevens Amendment Requirements Policy #2011-3, WSW Economic Security for All – Eligibility Policy #3501-1, WSW Economic Security for All – Career Accelerator Incentives Policy #3502-1, and WSW Monitoring Policy #2003-6.

Ted Sprague moved to approve the Consent Agenda as presented, second by Renny Christopher. Motion carried.

STRATEGIC PLANNING:

Lisa Keohokalole Schauer and Kim Sogge with PointNorth gave an overview of the draft strategic plan 2025-2029 framework. Goal statements, priorities, and success measures/progress indicators were shared. Next steps will be that WSW staff will review and edit the success measures to align with goals and the final strategic plan will go in front of the full board for adoption at the September board meeting. Questions and comments were addressed by PointNorth and CEO Halliday.

CEO UPDATE:

CEO Miriam Halliday shared the draft September board agenda and will make minor changes provided by the Executive Committee. CEO Halliday gave updates around the WWA Conference that will be held Nov 12-14th and that five WSW board members will be attending. CEO Halliday also shared that the Governor will be visiting on October 10th at a location in

Cowlitz County that hasn't been determined yet, an email with more information will be sent out to the full board.

NEW BUSINESS / OTHER ITEMS:

None.

ADJOURNMENT:

With nothing further for the good of the order, Chair Simmons entertained a motion to adjourn the meeting at 4:31 p.m.

Ted Sprague moved to adjourn the meeting at 4:31 p.m.

DRAFT



CONTRACT MEMO

DATE: SEPTEMBER 18, 2024
TO: MIRIAM HALLIDAY, WSW CHIEF EXECUTIVE OFFICER
WSW EXECUTIVE COMMITTEE MEMBERS
FROM: LINDA CZECH, WSW CONTRACTS MANAGER
RE: CONTRACT UPDATE (AUG-SEPT 2024)

WSW **modified** the following contracts:

- Partners in Careers decreased budget by \$42,762 for total budget of **\$173,526.00** for WIOA Title 1 Youth Out of School, end date remains **June 30, 2025**.
- Partners in Careers revised Statement of Work and Productivity & Performance Measures for Department of Labor Summerworks, no change in budget **\$165,629.70** or end date **September 30, 2025**.
- Career Path Services revised Statement of Work and Productivity & Performance Measures for Department of Labor Summerworks, no change in budget **\$695,656.13** or end date **September 30, 2025**.
- Career Team increased budget by \$10,471.63 for total of **\$176,551.63** for Department of Labor Summerworks, no change in end date **September 30, 2025**.

WSW **executed** the following contracts:

- Career Team for State Economic Security for All contract, budget **\$20,000**, end date **June 30, 2025**.
- Career Path Services for WIOA Title 1 Youth Out of School contract, budget **\$588,990**, end date **June 30, 2025**.
- Career Team for WIOA Title 1 Youth Out of School contract, budget **\$171,093**, end date **June 30, 2025**.
- Equus Workforce Solutions for State Economic Security for All contract, budget **\$506,479.80**, end date **June 30, 2025**.

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

- WSW received grant modification Department of Labor Community Projects Summerworks for the Statement of Work, no change in budget **\$1,500,000** and extend end date to **December 31, 2025**.
- WSW received grant award Employment Security Federal Economic Security for All for **\$187,211**, end date **September 30, 2025**.
- WSW received grant modification Employment Security Department QUEST DWG to extend end date to **December 31, 2024**.

Board Approval Needed-

- Approval needed for *PY24 Title I Adult and Dislocated Worker* funded contracts for October 1, 2024, to September 30, 2025, this is year 3 of the 3-year Adult and Dislocated Worker procurement cycle, to provide services in Clark, Cowlitz, and Wahkiakum Counties.
 - Career Team, LLC Adult & Dislocated Worker contract not to exceed **\$900,001**
 - Adult Total: \$504,721
 - Adult – Clark: \$332,816
 - Adult – Cowlitz & Wahkiakum: \$171,905
 - Dislocated Worker Total: \$395,280
 - DW – Clark: \$260,650
 - DW – Cowlitz & Wahkiakum: \$134,630
 - Career Path Services Operator contract not to exceed **\$340,000**.
 - Clark: \$272,000
 - Cowlitz & Wahkiakum: \$68,000
- Approval needed for Matched Investment Savings Accounts (MISA) project funded by Economic Security for All Community Reinvestment (EcSA CR) funded for October 1, 2024 to June 30, 2025.
 - Hispanic Metro Chamber - **\$300,000**
 - Lower Columbia Community Action Program - **\$199,251**



MEMO

DATE: SEPTEMBER 18, 2024
TO: WSW EXECUTIVE COMMITTEE
FROM: AMY GIMLIN, WSW CHIEF OPERATING OFFICER
RE: EMPLOYEE HANDBOOK REVISIONS

WSW Employee Handbook

During the Spring, WSW hired our Human Resource Consultant (TruppHR) to review our Personnel Policies to ensure compliance. During this revision we also added and/or edited sections based on our culture and path forward. Below is the summary of revisions:

1. Numerous grammar and updated language throughout such as Affirmative Action (page 7) and Reasonable Accommodation (page 11). Including removing assumption of pronouns for employees.
2. Work Schedules - Revised to reflect our current hybrid model (page 14).
3. Vehicle Use – added the prohibition of texting while driving (page 24).
4. Travel Time – revised this section to clarify mileage reimbursement and add Travel Procedure link (page 31).
5. Benefits – added the eligibility of Medicare reimbursement (page 37).
6. Fringe Benefit – revised the language to a “parking” allowance, this was a DOL finding that was recommended we remove the home office language as it makes it seem duplicative of on-site office expenses (page 37).
7. Holiday – added new holiday Lunar New Year in January (page 37).
8. Sick Leave – clarified eligible uses for taking sick leave (page 38).
9. Sabbatical Leave Program – added a section describing and linking to internal policy (page 42).

In addition, with this revision, we revised or included the following internal procedures including:

1. Inserted our procedure on the Sabbatical Leave Program.
2. Inserted our procedure on employee Travel.
3. Inserted our procedure on employee Pay Increases.
4. Revised the employee Professional Development procedure.
5. Revised the employee Annual Evaluation.



Workforce Southwest Washington Policies and Procedures

Sabbatical Leave

Date of Original Policy: 09/25/2024

Effective Revision Date: 01/01/2025

BACKGROUND:

At WSW, we understand the importance of work-life balance and recognize the value of providing opportunities for personal and professional development to our dedicated employees. As part of our commitment to fostering a healthy and engaged workforce, we offer a Sabbatical Leave Program to eligible employees. WSW ensures that all eligible employees have equal access to the Sabbatical Leave Program, particularly those in different roles and departments that may have varying levels of operational demands.

The purpose of the Sabbatical Leave Program is to allow eligible employees to take a sustained break from their regular work responsibilities for personal development, rejuvenation, and/or community service activities while maintaining full pay and benefits.

POLICY:

Eligibility: To be eligible for a sabbatical leave, an employee must:

- Have completed a minimum of seven (7) years of continuous employment with WSW. The 7 years can include time off for WSW Cares Leave, bereavement, or paid time off. An individual can request a sabbatical every 4 years subsequent.
- Have demonstrated satisfactory job performance and adherence to organizational policies and procedures.
- Submit a formal sabbatical leave request at least 6 months in advance.
- Have their sabbatical leave approved by their immediate supervisor, COO, and the CEO.
- If the CEO is requesting sabbatical leave, approval will be necessary from the WSW Executive Committee.

Duration: The duration of the sabbatical leave will be 3 months with full pay and benefits. The sabbatical must be taken as one continuous period. Absent financial or operational need, the position held by the employee prior to the sabbatical, WSW will return the employee to the same job they held prior to the sabbatical.

Purpose of Sabbatical: During the sabbatical leave, employees may engage in activities that align with one or more of the following purposes:

- Pursue educational or professional development opportunities.
- Engage in volunteer work or community service projects.
- Travel for personal enrichment and cultural experiences.
- Focus on health and wellness activities.
- Spend time with family or pursue personal passions and interests.

Compensation and Benefits: During the sabbatical leave period, employees will continue to receive their regular salary and benefits, including health insurance, retirement contributions, and paid time off.

Return to Work Agreement: Prior to commencing the sabbatical leave, the employee and their supervisor will develop a Return-to-Work Agreement outlining expectations for the employee's return, including any transitional arrangements.

Reporting and Communication: Employees on sabbatical leave are encouraged to maintain periodic communication with their supervisor and colleagues, as appropriate, and can be further defined in the Return-to-Work Agreement.

Confidentiality and Non-Compete: During the sabbatical leave, employees are expected to maintain confidentiality regarding WSW's proprietary information and are prohibited from engaging in activities that conflict with the organization's mission or compete with its interests.

Approval Process: Employees interested in taking sabbatical leave must submit a formal request to their supervisor, the COO and CEO at least 6 months in advance. A request form will be made available to use. Sabbatical leave requests will be evaluated based on eligibility criteria, operational needs, and the potential impact on the employee's department and/or WSW team. Only one sabbatical leave request will be granted each calendar year across the organization, unless otherwise approved by the CEO. Sabbaticals will be spaced with at least 6 months in between one employee sabbatical and the next employee sabbatical. This does not guarantee that a sabbatical can be taken in the first year of eligibility which may delay the timing of the sabbatical to a later time. Preference will be given to the employee with the longest tenure at the organization and if the individual requested a sabbatical in a prior year.

Compliance: Employees are expected to comply with all applicable policies and procedures of WSW before, during, and after their sabbatical leave.

Modification or Termination: WSW reserves the right to modify or terminate the Sabbatical Leave Policy and/or Request at any time, with or without notice, at its sole discretion.

Policy Review: This Sabbatical Policy will be reviewed annually by members of the WSW Executive Committee and the WSW Executive team to ensure its effectiveness and alignment with the organization's goals and values.

INQUIRES

Please contact Amy Gimlin agimlin@workforcesw.org (360) 567-1059 for questions.



WSW EMPLOYEE AND BOARD MEMBER TRAVEL PROCEDURE

1. Reimbursement for mileage on personal vehicle use, lodging, and meals and incidentals as a per diem amount are paid at current federal rates. Current federal mileage, lodging, and per diem rates may be ascertained by visiting the federal per diem homepage: <http://www.gsa.gov>. Documentation must be provided of the business purpose, time, place, and travel destination.
2. When traveling outside of the ~~three-county~~ WSW Service Area region or Portland metro area travelers should prepare a written estimate of total trip costs, including any registration fee and non-travel costs, and have it approved by the Chief Executive Officer (CEO) prior to registering for a conference or embarking on a trip. The WSW Service Area includes Clark, Cowlitz, Wahkiakum, and Multnomah Counties. CEO travel estimates should be approved by the Chief Financial Officer (CFO).
3. The federal per diem rate for meals and incidentals for the destination area will apply. For the first and last days of an overnight trip, the traveler will be paid 75 percent of the federal per diem rate. This differential is intended to acknowledge that travel days are, on ~~the~~ average, not full days of travel.
4. Except for unusual circumstances approved by the Chief Executive Officer, ~~only mileage will be reimbursed for single day travel within the three-county WSW region or Portland metro area.~~ Meals will not normally be reimbursed unless they are part of the business meeting.
5. If a trip is for one day only and is outside the WSW ~~region or Portland metro~~ Service Area area but does not require an overnight stay, the actual cost for meals will be reimbursed, not to exceed the federal per diem rate for the destination area, if receipts are submitted. Alternatively, if the one day only trip outside the WSW ~~region or Portland metropolitan~~ Service Area area exceeds 12 hours, 75 percent of the federal per diem rate for the travel destination area can be reimbursed to the traveler.
6. Meals that are provided to the traveler at no cost (i.e., conference meals) should be deducted from the per diem rate based on the current federal breakdown for meals and incidentals.
7. Receipts for expenses not included in the federal per diem reimbursement rate should be submitted before reimbursement will be issued. Receipts must be itemized and show enough detail to determine ~~the~~ allowability of the purchased items. Expense reimbursement requests not accompanied by a purchase receipt will be considered for reimbursement and must be approved by a WSW Officer. In no



circumstances will an expense be reimbursed for an amount exceeding \$50.00 without a receipt.

8. Travelers should make every effort to minimize lodging costs. ~~The Actual~~ actual cost of lodging plus taxes will be reimbursed to the traveler. Costs ~~in excess of more than~~ federal lodging rates must be cleared with the Chief Executive Officer prior to travel in order to be reimbursed. When traveling to approved conferences, the conference hotel rate will be reimbursed without prior approval. CEO lodging costs ~~in excess of more than~~ federal lodging rates should be approved by the CFO or COO.
9. Travel advances for meal and lodging costs will be made if requested by the traveler at least two (2) weeks prior to the trip and if the traveler has provided required documentation for ~~any and all~~ prior travel. When a travel advance is received, the traveler must submit a complete travel report and expenses within 10 working days following completion of the trip.
10. In general, travelers are expected to submit mileage and travel reimbursement requests by the end of the month in which the expense took place.
11. Expenses for family members or friends who may accompany an employee or Board member are not paid by WSW. Similarly, if additional time for personal travel is combined with business travel, only expenses for the business portion of the travel by the employee or Board member are reimbursed. No reimbursement is made for any portion of travel expenses incurred in consequence of a traveler's decision to extend ~~his/her/their~~ stay beyond the minimum period of travel necessitated by WSW's business needs, incurred for travel to any destination not necessitated by WSW's business needs, or incurred by or for any non-employee travel companions (other than necessitated by WSW's business needs). In no event are expenses reimbursed more than actual expenses or per diem amounts specified above. If traveler receives travel related reimbursement more than the proper entitlement, the traveler is liable for repaying the overpaid amount due within two (2) calendar weeks of notification.
12. If an employee or Board member uses their automobile for work-related travel, they must have a valid driver's license and insurance. WSW does not carry insurance for damage to an automobile being driven by an employee or Board member, even on WSW business, and does not assume any liability for damage or loss to their automobiles.
13. Parking fines and fines for traffic violations are the sole responsibility of the driver, and no reimbursement will be made by WSW.
14. Other travel costs not included in lodging, transportation and per diem as addressed above should be approved by the employee's supervisor, the CEO or the CFO prior to embarking on a trip outside of the ~~three-county~~ WSW ~~Service a~~Area ~~or the Portland-~~



~~Metro area~~ (i.e. excess baggage fees, internet access, ground transportation, long term parking).

15. All employee expense reimbursements must be approved by a Director, the CEO, the CFO or the COO. Board Member expense reimbursements must be approved by the CEO.

16. Employees using their personal vehicle for WSW business may receive mileage reimbursement at the [GSA standard rate](#). ~~Daily commute mileage is not reimbursable. Commute mileage is defined as the first and last trip of the day between an employee's residence and any work location (WL) with the WSW Service Area. The WSW Service Area includes Clark, Cowlitz, Wahkiakum, and Multnomah Counties. If an employee's residence is outside of the WSW Service Area their reimbursable mileage for travel with the WSW Service Area begins when they reach the WSW Service Area. The attached graphic examples are not intended to be an exhaustive list of possibilities but give the framework for when mileage reimbursement is approved for work related travel. The following examples are not intended to be an exhaustive list of possibilities, but give the framework for when mileage reimbursement is approved for work related travel:~~

~~a. Traveling from office to a business meeting—mileage is calculated from the office to the location of the meeting and back to the office.~~

~~b. Traveling from home to business meetings, or business meetings to home, only the miles that are in excess of your normal commute to the office will be reimbursed. If your travel for the day starts or ends at your home, normal daily commuting mileage to, or from the office, as applicable, must be deducted from your reimbursable miles for the day.~~

~~c. If traveling to several meetings throughout the day the mileage between meeting locations is reimbursable.~~

~~Reimbursement will not be approved for daily commute mileage, which is defined as daily mileage used to go from home to the office and office to home for normal/daily work related activities.~~

~~Mileage reimbursement must be recorded using TimeCard Expenses procedure and be submitted with the monthly timecard of the same month the expense occurred. Mileage must be submitted no later than 60 days after the expense occurred.~~

~~17. Daily commute time is not chargeable.~~

~~18. If travel mileage is reimbursable then the travel time is chargeable.~~

~~19. Employee travel reimbursement requests should be recorded using Timewatch. Expenses should be submitted with the monthly timecard of the same month the expense occurred. A description of the travel including the beginning and ending points~~



must be included for all reimbursable costs. Reimbursement requests must be submitted no later than 60 days after the expense occurred.

~~17.20.~~ See WSW Procurement Policy #1003 and WSW Purchase Request Process for additional guidance.

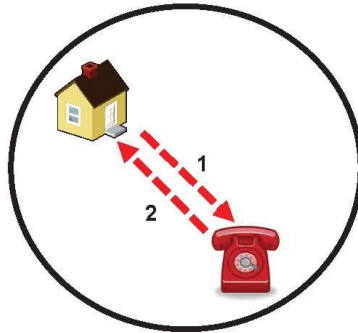
~~18.21.~~ Foreign travel paid for with Federal Grant Funds is prohibited unless explicitly approved in writing by the granting agency.



Example 1

Employee travels from their home to the office, and back home. Or, from their home to a WL within the WSW Service Area and back home.

<u>Leg</u>	<u>Reimbursable?</u>
1	No
2	No

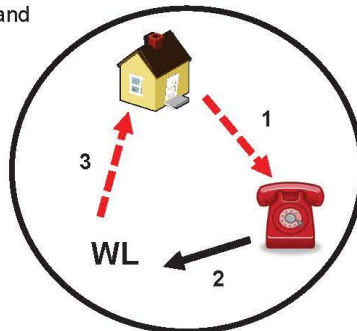


This is your normal commute and is NOT reimbursable.

Example 2

Employee travels from home to the office. Later in the day they travel from the office to a WL within the WSW Service Area and then travel home.

<u>Leg</u>	<u>Reimbursable?</u>
1	No
2	Yes
3	No

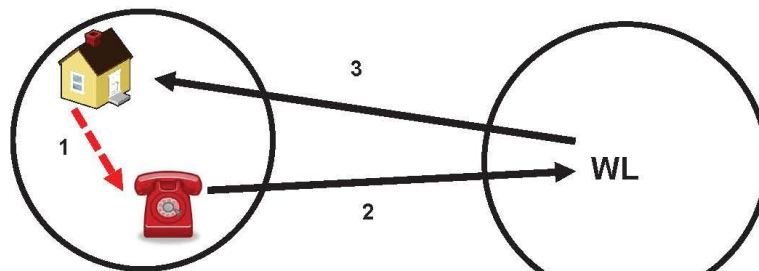


WSW Service Area

Example 3

Employee travels from home to the WSW office. Later in the day they travel from the office to a WL outside the WSW Service Area and then travel directly home.

<u>Leg</u>	<u>Reimbursable?</u>
1	No
2	Yes
3	Yes



WSW Service Area

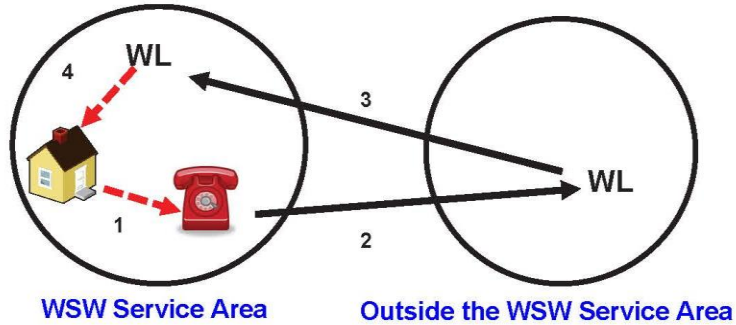
Outside the WSW Service area



Example 4

Employee travels from home to the office. Later in the day they travel to a WL outside the WSW Service Area, then to a WL within the WSW Service Area, and then home.

Leg	Reimbursable?
1	No
2	Yes
3	Yes
4	No



Example 5

Employee travels from home to a WL outside the service area without stopping at the office.

Leg	Reimbursable?
1	Yes
2	Yes



This is NOT your Normal Commute. The entire trip is reimbursable.



Employee Pay Increase Procedure

Workforce Southwest Washington employees can earn pay increases under the following circumstances. WSW employees will follow the [annual evaluation procedure](#) to document and determine performance increase. All pay increases are approved individually and based on funding availability.

Type of Pay Increase

1. **Promotion** – The Employee will receive a new title, job description, and pay increase that aligns with the new duties and appropriate step on the salary schedule.

Increase will be effective the first of the month indicated on approval document.

2. **Bonus** – The Employee may receive a one-time payment in the form of a performance-based bonus.

a. Things considered for a “bonus payment” may include:-

i. temporary assignment of extra duties,

ii. influx of funding causing extra time worked for several months,

iii. extraordinary performance due to circumstances in the industry or WSW, or

-iv. superb performance documented in the most recent annual evaluation or over several year’s evaluations.

b. Amount of bonus can be calculated in two different ways:

i. Amount is based on years of employment or

ii. 5% of employee’s current salary or

ii-iii. If an employee is asked to fill in for another employee while on extended leave* or while the hiring process is applied. The amount is based on extra duties performed, experience needed to fulfill those extra job duties, and level on salary schedule the duties were from.

*Extended leave for this purpose is defined as paid or unpaid time off for a period of 4 weeks or longer.

The bonus payment will be included in the paycheck following the end of the extra activities incurred.

3. **Cost of Living Allowance (COLA)** – The COLA is an annual determination based on budgetary responsibility. WSW CEO will determine if the COLA will be provided during the annual budget or budget revision development. If determined to distribute the annual COLA, it will be provided to all staff at the standard COLA of 2.0%.



COLA is effective January 1, contingent approval of the budget or budget revision from CEO and Board of Directors. COLA is documented on the employee's annual evaluation.

4. **Salary Equity Evaluation** – Every two years, WSW evaluates salaries based on the following:
- a. Equity internally within job titles and job descriptions.
 - i. Analysis is done to evaluate each employee's title, job description, and performance to ensure equity within the occupation.
 - b. Equity externally within the industry and nonprofit organizations.
 - i. WSW reconciles salary information received from *The NonProfitNonprofit Times – Salary and Benefits Report*. This report compiles nonprofit surveys across the country. Salaries and job description classification are compared from the new Salary Report with WSW's current Salary Schedule. The updated Salary Report information is inserted into our current Salary Schedule for those positions that indicate an increase. An analysis is done for each employee's position showing an increase or equal salary on the WSW Salary Schedule.
 1. If a salary in the Salary Report shows a decrease, WSW will not decrease the salary of that position on the WSW Salary Schedule and therefore will not decrease the employee's salary. The employee's salary will remain the same.
 2. If a salary in the Salary Report shows an increase, the salary will be updated on the Salary Schedule accordingly.
 - a. The WSW employee's current salary will be analyzed for a comparison of step placement on the updated Salary Schedule. An employee's salary will increase a maximum of 5% to support the equity analysis.
 3. If an employee's job description has changed, or the Salary Report job description has changed, a reclassification of the position may need to occur, and the WSW Salary Schedule is updated accordingly. This could mean a new salary schedule for the position given the updated information.

The increase will be effective July 1 if the annual budget is approved.

5. **Performance Increase** – If current pay is on the salary schedule Step 1-14, the employee's pay will increase by upward movement on the schedule. The Employee can move a maximum of two (2) steps at one time. The number of steps for the increase is determined by the supervisor and based on excellent performance factors throughout the year.

If current pay is at the final step (Step 14) of the schedule, the employee may be eligible for a performance increase with supervisor and CEO approval. This performance increase must



be in alignment with a positive annual evaluation. The amount of the increase will be the same percentage increase as the step increments (3.5%).

Performance increases are considered for the following:

- a. Skill development, increased knowledge and expertise in the job, increased knowledge and expertise of the industry, proactive collaboration, and leadership development.
- b. Performance increase is based on and documented in the employee's annual evaluation.
- c. Performance increase is reserved for top performing employees and requires a high level of specificity prior to approval.

The increase will be effective July 1 if the annual budget is approved. Occasionally, on a case-by-case basis a performance increase may be effective January 1 during the annual budget revision. Performance must be documented and decided upon during the employee's annual evaluation.



Employee Professional Development Procedure

Workforce Southwest Washington (WSW) offers professional development ~~in both the way of as a~~ group ~~trainings and or~~ individual. An analysis of need and importance will be done annually during the summer months. An employee is afforded the opportunity to attend an individualized training course during each program year.

New Employee Onboarding

During first day orientation, new employees are asked to attend Equal Opportunity Training in the near future a calendar invite will be sent set up by Amy or Tamara and the LinkedIn Learning Equity Pathway following videos:

- Unconscious Bias - https://www.youtube.com/watch?v=d8pTElq_IWo&t=1s
- Racial Bias - <https://www.youtube.com/watch?v=rVNb53IkBuc>
- Bias Impacts - https://www.youtube.com/watch?v=vOVM61h_bus
- Emotional Intelligence - <https://www.youtube.com/watch?v=Y130bfEJsK8>
- Cultural -seriesCompetency series (5 videos)- <https://www.youtube.com/playlist?list=PLiyGJj6i13PUwEX8zWIOrLU0tXVBmusuz>

New employees are required to attend the Building a Community of Equity (BaCE) training facilitated by their supervisor during their first 3-6 months of employment. The supervisor will use the slide deck provided by Obie Ford III of WSUV. During or immediately after the training completing BaCE, the new employee will take the Intercultural Development Inventory (IDI) and receive review their individual analysis. Individual IDI may be completed every 3 years for updated individual goal setting. Each supervisor is responsible for ensuring their team members have taken the survey and receive their new results. This score will then be combined into our overall organization IDI.

For supervisory employees, in addition to the trainings listed above, they must attend WSW specified supervisor training within 3 months of hire date.

Ongoing WSW Team Training

Monthly, WSW coordinates a required Lunch and Learn. Lunch and Learns are informal learning sessions that typically occur during the lunch hour, therefore, feel free to bring your lunch and eat while you learn. The COO and Office Manager will schedule and administer. Any team member can support the learning opportunity with ideas, referrals, topics, and coordination. These opportunities will typically be in the way of outside facilitation or group presentations. There will be a small budget attached for those months if we choose a training that requires payment.

Monthly, WSW schedules an hour for required teambuilding time. These teambuilding days will be coordinated on a rotating schedule by each team. The schedule can be found on the WSW Teams page. There will be no budget attached, just fun, get-to-know-you activities or learning opportunities that would benefit the whole group.



~~On even years~~Annually, WSW leadership will put out an ~~an anonymous~~ climate survey ~~during January - March~~ ~~during July-October~~. It is encouraged that all staff participate in this survey and provide honest productive feedback. The results of this survey will be analyzed during ~~November-December~~~~April-May~~ for themes and essential training needs. The training opportunity will be named and scheduled for the following calendar year. This will be a required training for all staff to attend.

~~Every three years~~Following the climate survey schedule, the WSW team will ~~retake~~ ~~complete an their individual~~~~organizational~~ IDI ~~'s to be consolidated into our organizational IDI~~. Individually, each employee will receive their results with an assessment interview. Each supervisor is responsible to ensure their team members have taken the survey and receive their new results. WSW will also receive a new IDI score that will be discussed with leadership and then the whole team. This will help us as an organization ~~to~~ see if our trainings and professional development is effective in our journey.

Ongoing Individual Training

An annual budget is developed for staff professional development, the amount budgeted varies year to year. Each supervisor is responsible for discussing and approving individual team members' professional development based on their annual evaluation, job description, or IDI. The supervisor and employee must complete the [professional development request form](#) before arrangements can be made for the professional development. A presentation at a Lunch and Learn or summary in evaluation is expected after a training investment is made and completed.

Individual volunteer hours as an option or required may be coming in ~~the next~~~~future~~ iterations of this process. Group volunteer time can be scheduled and coordinated through the monthly teambuilding days.

C-Suite positions (CEO, COO, CFO) will schedule individual professional development annually based off the 360 Review results. Trainings will be discussed with CEO or Board Chair.



Employee Annual Evaluation Procedure

Workforce Southwest Washington will conduct annual evaluations of staff during the last two months of every year. Evaluations are based on ~~performance during the~~ calendar year of January ~~through~~ December. Merit increases approved during the evaluation will be added to the annual budget for implementation the following July 1. Pay increases are allowed two times during the year, July 1 during annual budget development and January 1 during annual budget revision. ~~Cost of Living Allowance increases will be approved with the annual budget revision and take effect January 1.~~ All ~~merit performance~~ and cost of living increases must be documented and signed on the evaluation form.

During the annual evaluation period, it is also a good time to review individual job descriptions and make any necessary revisions.

Type of Evaluation

1. Executive Leadership 360 Review - ~~Executive Leadership completes the same Self Appraisal form as Director team.~~ One person will be assigned as the point person for each executive. The point person will choose 1 Director, 2 Staff (different from Director chosen), and 2 partner staff. Feedback Questionnaire will be submitted using Microsoft Forms for WSW Staff. This Feedback Questionnaire using Microsoft forms will be used for Partner feedback. The roll up for analysis will be kept anonymous and combined by COO except the CEO will analyze for COO.
2. Director Self Appraisal Review - ~~Directors and C-Suite Executives~~ These employees will complete the Director Self Appraisal form- Year in Review Self Appraisal Form prior to the evaluation meeting with CEO. CEO will add any additional comments and/or goals discussed. The final document will be submitted to ~~COO~~ the COO for signature processing and filed in employee file. Any pay increases will be forwarded to payroll.
3. Staff Self Appraisal Review - Staff will complete the Staff Self Appraisal form- Year in Review Self Appraisal Form prior to the evaluation meeting with supervisor. Meeting with Supervisor will occur November to early December. The Supervisor will add any additional comments ~~and/or salary adjustments and/or goals discussed.~~ The final document will be submitted to the COO for signature processing and filed in the employee file by end of December. Any pay increases will be forwarded to payroll for processing if approved in budget.

In January, all staff will complete the Year Ahead Appraisal Form prior to the meeting with the Supervisor. The meeting with the Supervisor will occur at the beginning of January and it will provide the opportunity for discussion of upcoming goals. The form must be

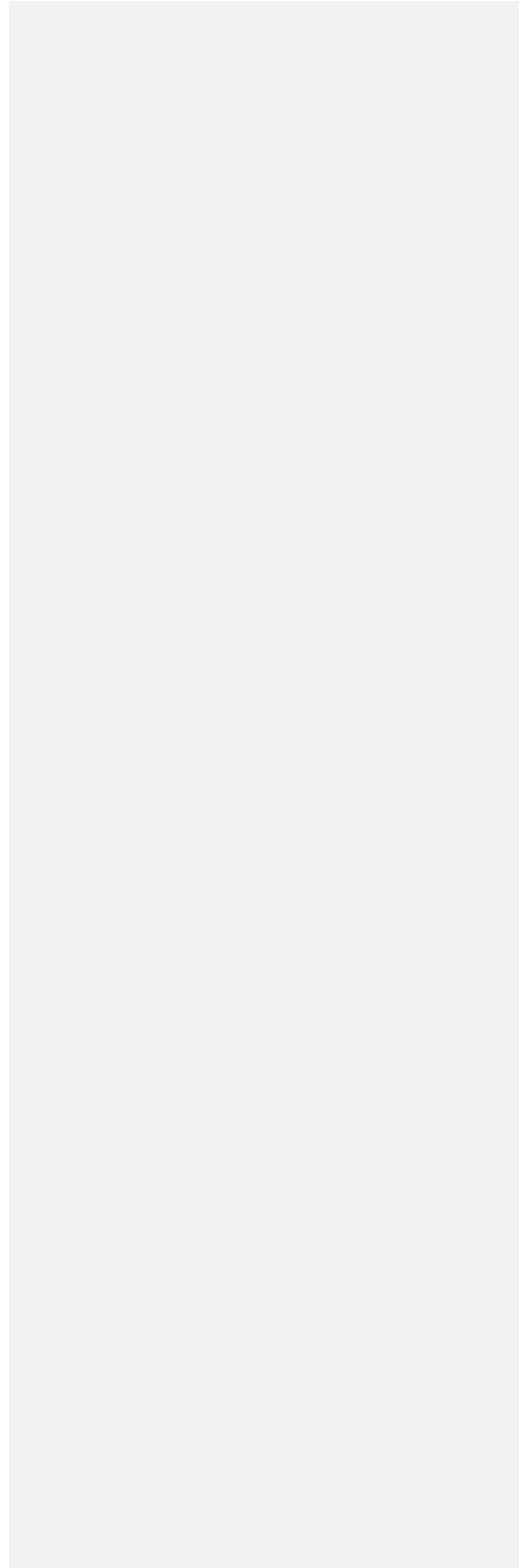
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workforce
SOUTHWEST WASHINGTON

[finalized by the end of January. This form will be used when reviewing the year in November/December.](#)





Workforce Southwest Washington Hiring Procedure

- 1) Supervisor creates or revises job description, using this [template](#). See [Job Description Process](#) for more information.
 - a) CEO and COO review and approve.
- 2) All open positions are available for internal candidates to apply first with priority for 3 days before it will be posted to ~~public~~the public. The COO will send application packet to all staff. ~~I and~~ interested individuals will contact COO for consideration and follow the same process as external candidates. At the CEO discretion, the hiring process may continue with just internal candidates and not open up for external candidates. Procedure below may change at the discretion of the CEO if only continuing with internal candidates. This could include less interviews, completing a promotion request, and/or developing a timeline for promotion if ~~internal~~an internal candidate is not promoted to new position.
- 3) After 3 days of internal posting, the job will be posted ~~for~~to the public and remain open until filled. As part of the external posting, the Supervisor may choose to use a 3rd Party Staffing/Recruiting Agency simultaneously (see #5).

4) For permanent openings:

~~a) The~~ Office Manager will ~~posts~~ permanent openings with WorkSourceWA; Partners in Diversity; Coalition of Communities of Color; Next; LaunchPad; Mac's List; The Nonprofit Network; Clark College; WSUV; LCC, PCC; PSU. Working with the Supervisor, other job boards may be used for specific positions.

~~a)b) The~~ Director of Communications will writes the job announcement, posts to our social media channels, email blast, and blog. The pPost must include ~~link~~a link to application packet requirements.

5) For temporary or internship openings:

~~b)a) The~~ Office Manager will posts temporary or internship openings with WorkSourceWA; Coalition of Communities of Color; Next; LaunchPad; Clark College; WSUV; LCC, PCC; PSU. Working with the Supervisor, other job boards may be used for specific positions.

~~e)b) The~~ Director of Communications will writes the job announcement, posts to our social media channels, email blast, and blog. The pPost must include link or list application packet requirements.

~~5)6) If~~ internal postings and outreach doesn't reach an acceptable amount for a diverse applicant pool, ~~At the discretion of the CEO,~~ WSW may hire a 3rd party recruiter or temporary employment agency to fill position ASAP at the discretion of the CEO. A 3rd party



~~recruiter may be hired, and qualified candidates will continue with the process of hiring as necessary.~~

~~6)7)~~ Office Manager/Recruiter forwards the electronic application packets to the COO, or designee.

~~7)8)~~ COO, or designee, does initial screening of applications.

- a) Screening is based on job posting and application packet requirements.
- b) If any piece of the application requirements is missing, Office Manager or COO will email applicant to notify they will need to submit all pieces in order to move to the interview phase of process. Once all pieces are submitted the applicant will move forward, no additional ~~follow-up~~ follow-up will be provided.
- i) To move on to first interview application packet must include:

(1) All components required in the application packet.

9) The interview committee will watch a training video on Unconscious Bias during Interviewing and Hiring. <https://www.youtube.com/watch?v=GRDHXJ5cO1U> & <https://www.youtube.com/watch?v=UDJ5-hfkF4Y&t=79s>

~~8)10)~~ COO, or designee, and Hiring Supervisor conduct initial interview.

- a) Typically done by phone or video. Interview should be conducted with accessibility in mind.
- b) WSW has a set of standard questions including a question on experience with DEI initiatives. Hiring supervisor can add job specific questions. [Interviews-Interview questions](#) will not be shared ahead of the interview, unless for a reasonable accommodation. All questions will be reviewed for inclusion.

~~9)11)~~ Hiring Supervisor, COO, and other pertinent staff conduct 2nd interview.

- a) Could be in person or virtual. Interview should be conducted with accessibility for all in mind.
- b) WSW has a set of standard questions including a question on experience with DEI initiatives. Hiring Supervisor will ask job specific questions ensuring consistency with each applicant. [Interviews- questions](#) will not be shared ahead of the interview, unless for a reasonable accommodation. All questions will be reviewed for inclusion.
- c) Supervisor may request work samples or may conduct 3rd party skills test ~~when applicable.~~ ~~V~~ vendor or online test must be statistically proven to test and treat everyone the same.



~~10~~12) If hiring for a director position or above, a 3rd interview will be conducted with same interview panel from the 2nd interview. The 3rd interview will be a presentation round on the topic chosen by ~~supervisor~~the supervisor.

- a) ~~Presentation~~The presentation round will be the same for all candidates and will be held in an accessible way with inclusion in mind.

~~11~~13) CEO and COO will conduct a 4th interview for all supervisory positions to ask any outstanding questions and clarify anything for the candidate.

~~12~~14) Upon review, and approval of CEO and COO, Hiring Supervisor offers the position *contingent* on background check for fiscal positions and ~~checks~~-reference checks for all others.

~~13~~15) Hire/Start date is determined.

~~14~~16) COO writes an offer letter to chosen applicant.

~~15~~17) Hiring supervisor conducts references checks and confirms employment eligibility for applied position.

~~16~~18) COO searches E-Verify to ensure compliance once I9 is completed on first day.

~~17~~19) COO conducts onboarding presentation and completion of hiring paperwork on first day.

~~18~~20) Hiring supervisor continues with onboarding through the first months of work.