

**Regional Program Standards**

**Focus:**  WorkSource Centers  Youth Program Services  
 Other: Economic Opportunity Programs

**Topic: PDX Metro Works**

**Date:** July 1, 2023

New  Revised

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## PDX Metro Works

The PDX Metro Works program provides a suite of services delivered to a diverse population of participants and includes a range of services to assist the participants in career exploration, obtaining work readiness and workplace skills practice and subsidized Work Experience (WEX) through Worksystems-funded programs and initiatives. The program includes worksite development, WEX job coaching and WEX job matching/placement services to participants to maximize both participant and employer participation.

Priority is given to participants enrolled in one of the Economic Opportunity Programs (EOP), A Home for Everyone (AHFE), the Aligned Partner Network (APN), WorkSource partners or other targeted grants or programs as identified by Worksystems. Participating employers provide a structured work environment while wages are paid by an approved Employer of Record. A WEX worksite may be in the private for-profit, non-profit or public sector.

Service provider functions within the PDX Metro Works program include:

- **Worksite Development Program Operator:** Responsible for the recruitment of worksites, completion of worksite documentation, management of the Worksite Agreement/Terms and Conditions as defined below in these regional program standards and providing ongoing monitoring and support to worksites and worksite supervisors.
- **Worksite Liaison:** Employed by the Worksite Development Program Operator and responsible for placing the participant at a worksite, interfacing with the participant on their worksite performance, interfacing with the worksite supervisor, supporting the relationship between the worksite and participant and verification of hours worked for the Employer of Record.
- **Career Coach:** Employed by service providers and responsible for supporting participants through the enrollment and hiring process, advocating with the WEX Specialist on the appropriate worksite placement decision, providing needed support services to the participant and assisting the WEX Specialist with participant performance on the worksite as the primary interface with the participant.
- **Community Referral Partner:** Community Referral Partners include the APN and WorkSource partners. The APN are community-based organizations who sign a Memorandum of Understanding outlining a partnership with Worksystems to align resources and services so eligible community adult participants have access to WorkSource Partner services.
- **WorkSource Liaison:** Employed by the WorkSource Center contractor and assists career coaches in program enrollment and WEX placement to allow participants to enter and complete a WEX.

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## Quality Jobs Initiative

The Department of Labor and Worksystems are prioritizing advancing quality jobs in the workforce system through guidance, performance measurement, strategic use of funding opportunities, and provision of technical assistance to support quality jobs workforce strategies.

A Quality Job helps workers achieve economic stability and mobility, while prioritizing diversity and worker voice. The Columbia-Willamette Workforce Collaborative convened a Quality Jobs Council, comprised of 19 cross-sectoral participants representing businesses, workers, labor, service providers and government agencies to develop a regional definition of Quality Job to include 1) self-sufficiency wages, 2) safe working conditions/worker engagement, 3) predictable hours, 4) comprehensive benefits, 5) accessible hiring and onboarding practices and 6) training and advancement opportunities. The full CWWC Quality Jobs Framework can be found at this [link](#).

Worksystems will continually engage with employers to increase quality job opportunities for populations that have been historically underrepresented in careers with elements of high job quality and build partnerships that raise job quality in meaningful ways for all residents in our region. Additional guidance and training regarding career coaching with an emphasis on job quality will be provided by Worksystems.

Additional information and guidance can be found below in the Additional Performance and Data Guidance section.

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### Eligibility

Participants must be enrolled in an eligible Worksystems-funded program or be referred by a Community Referral Partner when they begin receiving PDX Metro Works services. A WEX is intended to prepare a participant for future, unsubsidized employment, therefore participants with very limited work experience or those that are making career changes and have limited to no work experience in the target occupation are prioritized for services.

### Co-enrollment

Participants must be co-enrolled in WIOA Adult/DW and/or the discretionary grant project that is funding the WEX, following the eligibility determination and registration requirements of each grant. Refer to regional program standards for the specific discretionary grant for additional details and requirements.

### Legal to Work

All participants must be documented as Legal to Work. The documentation requirements of the Federal Form I-9, Employment Eligibility Verification, are used to verify the participant's ability to legally work in the US and therefore be hired by the WEX Employer of Record.

**Note:** Completion of the I-9 form is required for participants in a wage paying WEX prior to beginning work.

### Enrollment

The following steps must be completed to enroll a participant in the PDX Metro Works program. Not completing all steps and acquiring all signed and dated forms and documentation prior to the start of the participant's WEX service will result in questioned and disallowed costs.

- The participant's career coach completes an online referral form to notify the PDX Metro Works staff of the participant's interest in the program.
- The Worksite Development Program Operator staff contacts the referring career coach to discuss the participant, possible WEX placement options and assess if the participant is a good match for the program. Operator staff verify the participant is enrolled in the I-Trac grant program that is funding the WEX.
- The career coach submits a copy of the participant's resume and career plan.
- The participant completes a screening with the Worksite Liaison.
- The participant completes the hiring process with the approved Employer of Record, including completion of the Form I-9 and legal to work document verification. The hiring process must be completed before a participant can begin a WEX.
- The Worksite Development Program Operator completes the PDX Metro Works I-Trac record and enrollment. The PDX Metro Works I-Trac Other Funding Source Control on the Registration Tab is used to document what funding source is being utilized to fund the WEX.

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### Enrolled Participant

Once all elements of eligibility determination and registration have been completed, the applicant must begin participation in program services within 90 days of the Application date. Participation begins with the first PDX Metro Works service entered into I-Trac.

## Service Definitions

### Career Coaching

PDX Metro Works participants will receive career coaching services through their referring Career Coach. While the participant is enrolled in PDX Metro Works, the Worksite Liaison will provide the following elements of Career Coaching:

- Coach participants in the personal and interpersonal (“soft” or “life”) skills required to successfully participate in the WEX.
- Provide regular check-ins to track participant progress and ensure participants successfully participate in and complete WEX activities.

### Work Experience

The WEX is a planned, structured, short-term learning/training experience that takes place in an employer’s workplace and involves work that is defined by a written, signed training agreement with the employer. The agreement outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained. The WEX is an employer-employee relationship with the participant and a wage must be paid. The Internal Revenue Service (IRS) Fair Labor Standards Act (FLSA) applies.

### Administrative Rules

- A WEX is no more than 40 hours per week (no overtime) and a maximum of 300 hours total.
- Worksystems will establish the WEX pay rate.
- All WEX services will pay at or above the current minimum wage for the Portland Metropolitan area. No WEX will pay a wage less than the minimum wage.
- Wages will be paid by an Employer of Record identified by Worksystems.
- Participants are not paid for holiday, vacation or sick leave.

The following require Worksystems written approval:

- Exceptions to the maximum total hours.
- Exceptions to the pay rate.
- A WEX hosted at any Worksystems contractor organization.

The WEX service is entered into the PDX Metro Works fund and copied to other relevant I-Trac funds being used to fund the WEX. For EOP enrolled participants the WEX is also copied to the EOP I-Trac record.

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### Work Experience Development

When developing the WEX, the following steps must be completed before a participant can begin the work experience service. All forms must be signed and dated prior to the start of the work experience.

- The Worksite Liaison and worksite must complete and sign a Worksite Agreement.
- The Worksite Liaison must conduct an onsite visit to the worksite to complete a Worksite Verification Checklist, ensure compliance with BOLI regulations, child labor laws when applicable, and appropriateness for participant placement.
- The Worksite Liaison must complete a position description which details, at a minimum, worksite name and address, worksite supervisor name and contact information, desired skills, type of work, any other requirements and schedule. The position description should not replicate an existing job description at the worksite; it should be unique to the work experience position.
- The Worksite Liaison must train and advise worksite supervisors on their role and ensure that they know and comply with adult and child labor laws.
- The Worksite Liaison reviews the position description and completes the Work Experience Training Agreement with the participant. The Work Experience Training Agreement must be signed by the participant, Worksite Supervisor and Worksite Liaison and must be signed and dated prior to the start of the WEX service.

Additionally, the following rules apply to PDX Metro Works WEX services:

- The WEX may not displace, replace or cause a reduction of hours for any regular employee of the worksite.
- A worksite may not accept any participant who is an immediate family member of any worksite supervisor or back up supervisor.
- The following job duties are disallowed or prohibited:
  - Involvement in political lobbying or required religious activities
  - Unprotected contact with hazardous materials
  - Job duties that require proximity to dangerous chemicals
  - Transport of self or others to perform job duties using a personal vehicle
  - Transport of others to perform job duties using a company vehicle
  - Work on ladders over 6 feet tall
  - Work on roofs
  - Work underground
  - Operate power tools/saws
  - Work with children or provide homecare in unsupervised situations

### Verification of Work Experience Hours

Throughout the duration of the WEX, the Worksite Liaison is responsible for coordinating timesheet submission to ensure on-time payment of wages. This includes obtaining supervisor verification of participant hours worked each pay period. If a participant fails to submit a timesheet, the Worksite Liaison will coordinate with the participant, worksite supervisor and/or the Employer of Record to ensure the participant is compensated according to the requisite state and federal laws.

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When a supervisor is unavailable or unable to verify participant hours, the Worksite Liaisons must immediately inform the Employer of Record and Worksystems as they work to secure verification.

Worksite Liaisons must continue to connect to supervisors or other representatives of the worksite through all communication means available (email, phone call, text, onsite visit) until verification of hours is obtained. If hours have been reported in error, the Worksite Liaison will work with the Employer of Record to correct the error.

Unverified hours paid to a participant in wages may lead to disallowed costs.

### Work Experience Monitoring

Throughout the duration of the WEX, the Worksite Liaison will regularly monitor the participant's progress. This requires collecting information from the worksite, the participant's Career Coach and/or the participant about the WEX.

Worksite Liaisons must monitor worksites for compliance with the Work Experience Training Agreement, program rules and expectations of providing a safe, secure, and positive work environment conducive to professional growth and development. Any time a participant expresses concerns about the safety of their worksite environment, OSHA violations or Equal Employment, Americans with Disability Act, and/or Title VII regulations specific to worksites (e.g., hostile work environments, harassment, etc.), the Employer of Record and Worksystems must be promptly notified.

If performance issues arise, the Worksite Liaison will consult with the worksite and coordinate with the participant's Career Coach to provide feedback to the participant.

### Completing Work Experiences

Worksite Liaisons must track total hours worked for each participant and notify the participant and worksite supervisor when 30 hours remain to prevent the participant from working more hours than planned and approved. The Worksite Liaison will also administer and collect Supervisor Evaluations from employers within 10 business days of WEX completion and provide a copy to the Career Coach.

### Terminating Worksite Agreements

A Worksite Agreement may be revoked at any point if the worksite violates a material term of the agreement such as displacement of an existing employee, nepotism, violation of regulations governing employment of a minor, significant safety violations, failure to adequately supervise the participant, failure to report worksite accidents or failure to report participant work hours in a timely and accurate manner.

Any violation of employment law will result in immediate termination of the Worksite Agreement. Terminated Worksites may be subject to a one-year minimum sanction from participating in the PDX Metro Works program.

### Participant Termination/Removal from Worksites

Participants are informed of the behaviors that may lead to disciplinary action at the worksite, including suspension, or termination from the WEX. Participants violating worksite regulations or not adhering to their responsibilities as outlined in the Work Experience Training Agreement will be suspended or terminated.

While worksite supervisors may suspend or remove a participant from their worksite for due cause, final termination of the participant is performed by the Worksite Development Program Operator.

## Support Services

### Overview

Support services are financial assistance to offset expenses necessary for a participant to engage in PDX Metro Works services. Support services are considered payments and do not extend program participation during in-program services; therefore, every in-program support service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching or WEX).

Prior to considering support service payments, the Worksite Development Program Operator must first check with the referring career coaching provider to assess if support service funding is available through the career coaching contract. Efforts must be made to identify resources in the community or from other grant resources that may provide the same support and use those available resources first.

Each service provider must have processes in place for appropriate referrals to such services as SNAP, community-based social services, and housing agencies. Staff are responsible for assisting participant exploration of resources from community sources and/or within the participant's personal support system. When other resources are not available, and based on individual assessment and availability of funds, support services may be provided through the PDX Metro Works program.

### Prerequisites

Participants who seek support services must complete enrollment in the PDX Metro Works program and the qualifying grant funding the support service. Please note that additional prerequisites may be required by the grant funding the support service, such as a completed Prosperity Planner budget.

### Administrative Requirements

Each service provider must establish a written process to ensure proper fiscal procedures are followed, including paying from original invoices or childcare logs, securing original receipts, and appropriate participant acknowledgment of direct payments made to reimburse participants.

Each service provider must establish and follow a process for reconciling pre-purchased support services (i.e., bus passes, pre-paid gas cards, retail store vouchers, gift cards, etc.). This reconciliation must occur at least quarterly (monthly preferred), with the documentation maintained on-site and made available during Worksystems or funder monitoring, as requested.

Support service payments/reimbursement must be made from funds during the program year in which they were incurred. A support service payment does not extend participation.

### Documentation

All support services are to be tracked in the participant's I-Trac record on the Payments Tab in the support services control. When a Support Service is paid directly to the participant a signature that acknowledges receipt of the support payment must be on file with the back-up payment documentation noted below in Support Service Definitions – direct deposit into an account in the participant's name and the endorsement on a cancelled check are allowable documentation of this requirement. Direct Deposit information must be received directly from the participant with approval to deposit support service payments to the account.



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When a gift card (including a gas card) is provided as the support payment, receipts for the total amount of the gift card that reflect the purchase of allowable and approved items are required with the fiscal documentation file.

Documentation of Support Service payments is maintained in the financial records attached to the payment record.

### Definitions

WEX service providers may provide the following types of support services. If the support is not defined below it is not allowable for payment under this policy, either due to local area restrictions or because the support is not allowable by funding source(s).

**Note:** Service provider contracts may have a variety of funding sources. It is important to check and ensure that the support expenses being covered are allowable to the selected funding source. It is noted below where WIOA funding cannot pay for late fees and interest charges. But there may be other restrictions on funding that are important to understand.

### Clothing/Personal Care

Clothing and/or related footwear or incidentals for interview (including grooming and hygiene products), work or training. This may include such items as a uniform/safety attire, or a type of work shoe or protective eye wear required for the job by an employer (and not provided by the employer) or required of trainees by the training provider. Utilize community resources for interview attire whenever possible.

**Required Documentation:** The original store or merchant receipt that reflects an itemization of the purchased items.

### Employment Documentation

Payment of fees required to secure or replace documentation required to complete an I-9 with an employer to secure employment.

**Required Documentation:** Receipts that itemize the fees necessary to obtain the approved document with staff attestation (notation and signature on receipt copy is sufficient) that the identification documentation was secured.

### Professional Test/License/Organization Fees

When membership, professional event registration and/or licenses/certifications/test/test preparation fees are required or necessary to ensure a participant is prepared for employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses (including a state-issued driver's license when required for the job); certifications; test fees and/or test preparation materials, including GED; business, technical and professional organization fees; professional event registration fees, etc.

**Required Documentation:** Original receipt(s).

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### Tools

When participants are required to purchase their own tools for employment or training, this cost may be covered by support service payments. Examples include mechanic, shop, electrician tools, etc.

Tools or equipment that is supplied by the employer, e.g., desk computers, industrial equipment, stationery, machinery, safety equipment, etc., may not be paid for with support services.

**Required Documentation:** Original itemized receipts that reflect the allowable and agreed upon item(s). In addition, for tool purchases for training, documentation from the training provider of the required items is to be maintained in the file. For employment, a bona fide, written job offer that shows the requirement of employees providing their own tools or equipment (must be specific) must be provided prior to the approval of funds.

### Transportation

Support services are available to provide transportation assistance to participants to allow them to engage in services and activities that support training and education, job search, and/or employment. Transportation types (and associated requirements) include:

#### Auto or Bicycle Repair

Funds may pay for repair and replacement of essential parts and safety equipment to an automobile or bicycle only if it can be verified there is no other reasonable way for the participant to transport himself/herself to a training or work site. For Auto Repair, the vehicle must be titled and registered in the participant's name, be properly insured and there must be written verification by a reputable certified mechanic that the repairs are needed.

**Required Documentation:** Original invoices/receipts are required for car and bike repair payments. Quotes or work orders will not be accepted for payment receipts. Auto Repair payment must be made to the invoicing certified mechanic and a copy of the auto registration, documentation of a valid driver's license, and proof of insurance card must be included with the payment record and verified to be the same vehicle on which repairs were made.

#### Auto Insurance

Support Service payment may be provided for auto insurance coverage required by the State of Oregon or Washington and can only be justified in a situation where, without the insurance, the participant would not be able to travel to the training site and/or place of employment. The vehicle must be titled and registered in the participant's name and the participant must have a valid driver's license in their state of residence.

**Required Documentation:** The original insurance billing with payment directly to the insurance company is required. In addition, documentation of a valid driver's license, a copy of the auto registration, and proof of insurance card is to be included with the payment record.

#### Auto Registration

Costs associated with DEQ test fees, title transfer and/or registration or renewal may be paid to allow participants to register their auto for the purposes of completing training or securing and/or maintaining employment. Note that the Oregon Department of Motor Vehicles may require a valid driver's license and proof of auto insurance attached to the vehicle.

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**Required Documentation:** The original registration/transfer/test receipt(s) and a photocopy of the new title and/or registration in participant's name must be collected and maintained in the Support Service financial file.

**Bicycle Purchase**

When a participant chooses and it is determined that the purchase of a bicycle is as, or more, cost effective than other types of transportation assistance, support service funds may be used to purchase a bicycle, including an appropriate bike helmet if the participant does not own one. When appropriate, staff may require the participant engage in a bicycle safety class, and this cost may also be covered through support service payment.

Service providers should develop a relationship with Community Cycling Center where consultation assistance on the decision and purchase, education and repair options are available (<https://communitycyclingcenter.org/>) for reasonable costs.

Staff due diligence is required to determine and document:

- Using a bicycle as a means of transportation to and from the participant's job, school or training location is reasonable and, over time, more cost effective and convenient than other forms of transportation. Staff determine reasonableness by evaluating with the participant things like distance, times, work schedule, long-term viability.
- The participant does not currently own a bicycle or have other modes of transportation available.
- The purchase price is reasonable based on some form of price comparison documentation (price quotes, including refurbished when available) for the type of bicycle being purchased.
- The type of bicycle being purchased is appropriate for the intended use (e.g., distance, night riding).

Once purchased no other forms of Transportation assistance may be provided via support services.

**Required Documentation:** The itemized receipt for the purchase and documentation of price comparisons to support the final selection decision are to be maintained in the financial file. Written attestation from the participant that they are choosing a bicycle for their transportation, they understand they will not be provided with other forms of transportation assistance once a bike is purchased, they do not currently own a bicycle, and justification that a bicycle is a reasonable mode of transportation for the purposes of getting to/from school, training and/or employment is to be maintained in the participant file.

**Public Transportation, Car Share, Fuel**

Includes all modes of transportation (e.g., public transportation passes or tickets, gas for a personal vehicle, car share service, Uber/Lyft/taxi service, bicycle/scooter share service) to help participants engage in services and activities that support training and education, job search and/or employment

Staff are required to determine that assistance provided is not duplicated, such as a bus pass for a month and gas purchase during the same month. Additionally, funds should not pay for the monthly cost of share vehicle services but can reimburse for the month(s) that the participant uses the service for allowable activities. This should be managed through verification of attendance logs and communication with the participant documented in file.

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***Required Documentation:*** A log must be kept that tracks activities supported with transportation assistance. A signature on the log for bus passes, bus ticket packages (not individual tickets), and gas card distribution to participants that includes the participant's signature acknowledging receipt can be used as documentation. For other types of transportation, a detailed receipt showing date and time must support reimbursement payment and must align with activities noted in the log. A signed receipt for each instance of transportation support payment in the file can replace a log as long as the tie to services is noted. Receipts are required for gas cards and must show allowable and approved purchase (i.e., gasoline and not items from the mini mart).

### Utilities

Utility assistance may be provided to assist a participant in stabilizing their living situation and to conduct an efficient job search, maintain employment or participate in training. This includes past due utility payments, utility deposits, internet cell phones and cell phone bills (but does not include any sort of television/cable expenses). Prepaid cell phone service may be paid for with Support Services funding.

The original bill must be provided before payment can be approved, with verification that the utilities/phone are for the participant's personal residence or in the participant's name (in the case of cell phones).

**Note:** WIOA funds may not be used to pay interest charges or late fees associated with past due utility expenses.

***Required Documentation:*** Clear verification (copy of detailed utility invoice that matches participants address in I-Trac) of charges due. Payment must be made to the vendor.

### Incentive

An incentive is a financially based reward to a participant for successful achievement of WEX goals and may be structured into certain PDX Metro Works projects. Incentives are currently available to participants in the Here for Portland and West Side Works programs upon meeting required program goals.

To award an incentive, the Work Experience Training Agreement must outline the project name that allows for the incentive, the requirements for the incentive to be paid and the approved amount.

**NOTE:** Incentives may not be paid with WIOA Adult or Dislocated Worker funding. The availability of an Incentive in a PDX Metro Works project must be approved by the funder in writing and maintained in the Worksystems grant fiscal file.

Incentives are paid through the Employer of Record; verification of the required WEX hours is to be done through that system. Any participant receiving an incentive must complete the required tax reporting documents including but not limited to W-4 or W-9 as applicable. Participants receiving more than \$599 in payments in one calendar year will be issued a 1099 or W-2 for tax reporting purposes.

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## Performance

Enrollment goals are established in contract statements of work for a minimum number of participants placed in a WEX.

Performance Measure Definition	Performance Measure Calculation
<p><b>Successfully Completed Work Experience</b> Of all participants placed in a WEX, the percent that end with a status of Completed.</p>	<p><b>Denominator</b> All participants that have WEX service with an end date.</p> <p><b>Numerator</b> Participants that have WEX service with a status of Completed-Hired or Completed-Not Hired.</p>
<p><b>Supervisor Evaluation Rate</b> For the total number of worksites, the percent that return a completed Supervisor Evaluation.</p>	<p><b>Denominator</b> All WEX services with a status of Started, Transferred, Completed-Hired, Completed-Not Hired, Not Completed Quit or Not Completed Fired. Excludes all participants with an I-Trac Work Based Learning service with an Evaluation Control with a status of "Not applicable to service type."</p> <p><b>Numerator</b> WEX services where the Evaluation Control = Yes or No in the Work Based Training record in I-Trac.</p>

### Here for Portland Performance

For participants placed in a WEX in the Here for Portland program the following performance measures apply. Enrollment goals are established in contract statements of work for a minimum number of participants placed in a WEX.

Performance Measure Definition	Performance Measure Calculation
<p><b>Successfully Completed Work Experience</b> Of all participants placed in a WEX, the percent that end with a status of Completed.</p>	<p><b>Denominator</b> All participants that have a WEX service with an end date.</p> <p><b>Numerator</b> Participants that have a status of Completed-Hired or Completed-Not Hired.</p>

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**Washington County Housing Careers Performance**

For participants placed in a WEX in the Washington County Housing Careers program the following performance measures apply. Goals are established in contract statements of work for a minimum number of participants placed in a WEX and the minimum number of businesses served.

Performance Measure Definition	Performance Measure Calculation
<p><b>Successfully Completed Work Experience</b> Of all participants placed in a WEX, the percent that end with a status of Completed.</p>	<p><b>Denominator</b> All enrolled participants.</p> <p><b>Numerator</b> Participants that have a WEX service with a status of Completed-Hired or Completed-Not Hired.</p> <p>Excludes the Work Based Training service provided by the Training Services Provider. Refer to the Housing Careers regional program standards for additional details.</p>
<p><b>Placed in Employment</b> Of all participants placed in a Washington County Housing Careers Program WEX, the percent that obtain employment.</p>	<p><b>Denominator</b> All participants that have a Washington County Housing Careers WEX service with a start date.</p> <p><b>Numerator</b> Participants that report unsubsidized employment.</p>
<p><b>Businesses Served</b> Worksites where a participant was placed in a work experience service.</p>	<p>Number of unique worksites with work experience participants.</p>
<p><b>Worksite Check Ins</b> Percentage of Worksites with at least one documented check-in per month during a WEX placement.</p>	<p><b>Denominator</b> All worksites with a WEX service with a start date.</p> <p><b>Numerator</b> Worksites with a documented monthly contact during a WEX placement.</p>
<p><b>Case Conferencing Sessions</b> Percentage of Case Conferencing monthly sessions. Case Conferencing sessions are meetings between the Career Coaching and Adult Worksite Development contractors. These meetings must be held at least twice a month.</p>	<p><b>Denominator</b> Months in the review period.</p> <p><b>Numerator</b> Months where Case Conferencing Sessions are held at least twice.</p>

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### West Side Works Performance

For participants placed in a WEX in the Westside Works program the following performance measures apply. Goals are established in contract statements of work for a minimum number of participants enrolled, placed in a WEX, businesses served and business identifying as BIPOC and/or women owned.

Performance Measure Definition	Performance Measure Calculation
<p><b>Successfully Completed Work Experience</b> Of all participants placed in a WEX, the percent that end with a status of Completed.</p>	<p><b>Denominator</b> All participants that have a WEX service with an end date.</p> <p><b>Numerator</b> Participants that have a status of Completed-Hired or Completed-Not Hired.</p>
<p><b>Participants Hired at Worksite</b> Of all participants placed in a WEX, the percent that are hired at the worksite at the end of their WEX.</p>	<p><b>Denominator</b> All participants that have a WEX service with an end date.</p> <p><b>Numerator</b> Participants that have a status of Completed-Hired.</p>

### Data Points

#### Community Referral Partners

The number of Community Partner organizations with participants enrolled in the PDX Metro Works program.

#### New Worksites Developed

The number new Worksite Agreements developed (excludes renewal of expiring Worksite Agreements).

#### All Active Worksites

The number of unique worksites actively engaged in PDX Metro Works services with current placements or open WEX positions.

#### New Positions Developed

The number of new position descriptions developed and posted in the WEX Bank for placement.

#### All Active Positions

The total number of position descriptions posted in the WEX Bank regardless of status.

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**I-Trac Data Entry**

Performance Element	I-Trac Data Entry Fields
<b>Successfully Completed Work Experience</b>	<b>Services Tab</b> Work Based Training Control  <b>Work Experience Service</b> Start of WEX = Entry of all data fields. End of WEX = Update of Status and Completed Hours.
<b>Participants Hired at Worksite</b>	<b>Services Tab</b> Work Based Training Control  <b>Work Experience Service</b> Start of WEX = Entry of all data fields. End of WEX = Update of Status to Completed-Hired and Completed Hours.
<b>Supervisor Evaluation Rate</b>	<b>Services Tab</b> Work Based Training Control  <b>Work Experience Service</b> Start of WEX = Entry of all data fields. End of WEX = Update of Status, Completed Hours and Entry of Evaluation field. Yes = Supervisor Evaluation received, and Supervisor satisfied with the WEX. No = Supervisor Evaluation received, and Supervisor not satisfied with the WEX.

**Additional Performance and Data Guidance**
**Case Notes**

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered into the system should not repeat information already entered into the participant's I-Trac record, but expand upon, provide context to or augment service or employment data, such as noting successes and challenges and progress toward Career Plan goals. Narrative case notes should not include any medical or treatment information, or personal information that is not relevant to their career plan activities.

**Data Entry Requirements**

All program information is reported to funders through the I-Trac management information system. To ensure accurate and timely Federal, State and Local reporting, all data is to be entered in the appropriate I-Trac control within five business days of the activity, payment, credential attainment, or receipt of employment information.



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### Exit

The Exit date is the date of the last in-program service entered in I-Trac.

### Auto-Exit

When a participant has gone more than 90 days without PDX Metro Works services they will be automatically exited. The Exit date is the last date of the PDX Metro Works service entered in I-Trac.

- **Global Exclusions for Performance:** Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in the program may be manually exited from the program. If this type of exit is recorded the participant will not be included in any of the performance measures.
- **Reserve Forces-Called to Active Duty:** The call to active duty must be for more than 90 days and a case note is to be entered which documents the information provided by the participant.
- **Deceased:** A case note that documents how staff received notification is required.
- **Health/Medical:** Used when the participant is going for any form of medical treatment that is expected to last more than 90 days. A case note that states how information was received is required. Absolutely no medical details should be included in the participant file or I-Trac case note – just the notification information.
- **Institutionalized:** When a participant becomes incarcerated in a correctional institution or is a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during services. A case note that states how the information was received by staff is required. No medical details or institution name should be included in the participant file or I-Trac case note – just the notification information.

### Participant

An applicant with a Participation Date in I-Trac.

### Placement

A placement is a participant with a WEX service start date in I-Trac (excludes planned status).

### Quality Job Standards

A quality job helps workers achieve economic stability and mobility, while prioritizing diversity and worker voice. The Quality Job Standards below should be incorporated into to career planning discussions with participants:

- **Self-Sufficiency Wages:** A quality job provides sufficient income to afford a decent standard of living. For example, jobs that offer pay consistent with published self-sufficiency standards that consider family composition and cost of living.
- **Safe Working Conditions/Worker Engagement:** A quality job offers employees dignity and respect and welcomes engagement in workplace operations. For example, quality jobs uphold and enforce anti-harassment and anti-discrimination policies and provide reasonable accommodation to employees with disabilities.
- **Predictable Hours:** A quality job offers employees predictability on the number of hours they are offered per week to minimize hardship on employees and their families.

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- **Comprehensive Benefits:** A quality job provides basic benefits that increase economic security, improve health and overall well-being. Quality jobs include healthcare, childcare, transportation, wellness programs and access to retirement savings programs, among other supports.
- **Accessible Hiring and Onboarding Practices:** A quality job offers transparent and accessible hiring and onboarding practices to ensure that employer and employee are set for success.
- **Training and Advancement Opportunities:** A quality job provides opportunities to build skills and access new roles and responsibilities in a workplace. For example, quality jobs offer internal pathways to support career progression and professional development opportunities.

The Quality Jobs Framework and Quality Job Standards should be utilized keeping in mind each program participant's unique career goals, education goals, and circumstances while developing an individualized career plan. The Framework should be used by career coaches to inform and facilitate discussions when exploring career path options and evaluating employment opportunities.

Situations may arise in which an employment opportunity does not meet all or only meets some of the quality job standards. Worksystems recognizes that getting on a pathway to a quality job is, at times, a necessary first step toward the attainment of a quality job. Supporting program participants while they remain on their career journey toward a quality job is the primary goal of a Career Coach when it comes to advancing quality jobs, and coaching job seekers in how to recognize a quality job is the key to accomplishing that goal. In the Follow-up phase, career coaches may support participants in refining the middle and longer-term goals in their career plans.

### Work Experience Service Statuses

A service status is entered in the WEX service in I-Trac under the following conditions:

- **Completed – Hired:** This status is utilized when a participant has started and completed a WEX and was hired by the worksite. This status is utilized for WEXs only when the participant has completed 80 percent of their planned WEX hours. A WEX may also be defined as Completed-Hired without reaching the 80 percent rate if the participant transitions to unsubsidized employment at their worksite
- **Completed – Not Hired:** This status is utilized when a participant has started and completed a WEX and the participant was not hired by the worksite. This status is utilized for a WEXs only when the participant has completed 80 percent of their planned WEX hours. A WEX may also be defined as Completed without reaching the 80 percent rate if the participant:
  - Transitions to unsubsidized employment.
  - Transitions to a secondary, post-secondary or occupational skills training program.
  - Has an identified medical necessity that precludes them from participating in the WEX.
- **Not Completed – Fired:** This status is utilized when a participant has started a WEX, but during the service, the participant was terminated from their placement.
- **Not Completed – Quit:** This status is utilized when a participant has started a WEX, but during the service the participant voluntarily ended their participation without completing 80 percent of their planned hours.

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### Documentation Requirements

#### File Documentation Requirements

Participant file documentation may be paper located in a physical file (to be kept in a secure [locked] file location); may be kept in a secure electronic file (secure means limited access/access requiring system permissions and is not in a folder accessible by all staff and with no security built in); or maintained in I-Trac.

#### Worksite Development File Documentation

The following standard forms will be used and are provided as Word document forms by Worksystems. Participants placed at a “Here for Portland” worksite are exempt from requirements noted with an asterisk (“\*”).

Requirement	Detail	Location
<b>Worksite Verification Checklist</b>	Used to ensure that all aspects of the program have been reviewed with the worksite, including compliance with BOLI and workplace safety assurances. Must be completed prior to a participant’s placement in a WEX service.	Worksite Development File
<b>Worksite Agreement</b>	Signed by the worksite company/organization and the worksite development contractor representative. These agreements are non-financial and outline the requirements and program responsibilities of the various parties involved in the WEX (worksite, worksite development contractor, employer of record).  A single <i>Worksite Agreement</i> may be signed by a company/organization with multiple worksite locations.  Must be completed prior to a participant’s placement in a WEX service.	Worksite Development File
<b>Work Experience Training Agreement</b>	Participant training agreement that outlines the details concerning the tasks the participant is expected to complete and learning goals for the WEX. It also details the work schedule and contact information.  Must be completed prior to a participant’s placement in a WEX service.	Worksite Development File

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Requirement	Detail	Location
<b>Worksite Supervisor Intern Evaluation*</b>	<p>This is the tool for a worksite to provide an assessment to the participant regarding their demonstration of necessary workplace skills, including soft skills, needed for success in any work environment. The worksite liaison is responsible for collecting the <i>Worksite Supervisor Intern Evaluation</i> from the worksite. The career coach is responsible for reviewing the evaluation with the participant.</p> <p>The Worksite Supervisor Evaluation must be sent to the Career Coach within 10 business days of the completion of the WEX.</p>	Worksite Development File

The following required documents are created by the Worksite Development contractor and must include the elements outlined in the Detail section.

Requirement	Detail	Location
<b>Position Description</b>	Must minimally include but is not limited to: Worksite name and address, worksite supervisor name and contact information, desired skills, type of work, any other requirements and schedule. Must be completed prior to a participant's placement in a WEX service.	Worksite Development File

**ARPA File Documentation:** Required when ARPA funds are used to fund the WEX.

Requirement	Detail	Location
<b>Program Application</b>	A completed and signed Program Application is required. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered and upload to I-Trac.	I-Trac

**Prosperity 10,000 File Documentation:** Required when P10K funds are used to fund the WEX.

Requirement	Detail	Location
<b>Program Application</b>	A completed and signed Program Application is required. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered and upload to I-Trac.	I-Trac