Overview

The Portland Clean Energy Community Benefits Initiative, also referred to as Portland Clean Energy Fund (PCEF), enables the City of Portland to provide a consistent long-term funding source and oversight structure to address climate change in a way that advances racial and social justice. PCEF funds support projects that reduce greenhouse gas emissions, capture carbon and promote community resilience to the impacts of climate change. Funding projects such as these will drive demand for businesses that work in these areas, and subsequently drive the demand for workers with the knowledge, skills and abilities to make it all possible.

PCEF is a suite of program services offered through community-based organizations and built on the career coaching model that systemically ties long-term, relationship-based career coaching for workforce preparation and training in the clean energy sector with training services delivered through WorkSource Portland Metro (WSPM).

Priority Populations

PCEF is designed to ensure that program investments benefit people who are most impacted by climate change and people who have historically been left out of the economic opportunity associated with climate projects. Priority populations include:

- Black people
- Native American/Alaska Native people
- Other people of color
- People with low income
- People who experience disabilities
- Women
- Transgender people
- Two-spirit people
- Gender non-conforming people and other groups of people who experience gender or sex-based discrimination

Contents

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.

Eligibility Requirements

Contractors must establish processes that prepare potential participants to complete the eligibility and enrollment requirements for PCEF as outlined below. To participate in PCEF a participant must:

- Be 18 years of age or older
- Be a resident of one of the following counties:
  - Oregon: Clackamas, Columbia, Multnomah, Washington or Yamhill
  - Washington: Clark or Skamania
- Be eligible for and enrolled in Prosperity 10K program
- Be eligible for and enrolled in WIOA, including completed WIOA Documentation

Eligibility Determination and Registration Process

Step 1: WOMIS Registration

All customers seeking services must complete the WorkSource registration process as defined by the State of Oregon. Tracking of registration process completion is managed through the WorkSource Oregon Management Information System (WOMIS). The customer’s acceptance of the disclosure information and data submission is their electronic WIOA application signature.

Once the WOMIS registration is complete, the customer must complete an iMatchSkills Profile and provide staff with an approved document that validates the date of birth entered in WOMIS. Staff enter the ID number or name in the appropriate field on the staff WOMIS screen and click the Welcome Complete box to finalize the process.

Step 2: WIOA Documentation for WorkSource

The WIOA Documentation is to be collected and either:

- Uploaded using the tool and process provided through I-Trac. Follow Customer Secure Document Upload Tools instructions found on the I-Trac Resources/User Instructions tabs.
- Copied and maintained in a customer file, secured in locked cabinets onsite at Contractor/Center business location or scanned to an electronic file on a secure server with limited and password protected access.

> **Note:** Completing the Welcome process and WIOA Documentation is the responsibility of the Contractor/Center where the documents are collected and data-entered in I-Trac. If there are eligibility documentation questions that arise during monitoring that lead to questioned or disallowed costs, the Contractor or Center that managed the process is responsible for the questioned/disallowed costs.

Date of Birth/Age

Baptismal certificate	Passport
Birth certificate	Public assistance record
DD-214 Military Separation Record	School record or identification card
Government issued ID	Driver's License
Hospital record of birth	Tribal record

Legal to Work in the US

Participant attestation at registration is accepted. An affirmative answer must be reflected in the WSO Registration Tab data in I-Trac.

Selective Service Registration

If applicant is required to register for Selective Service and documentation under one of the categories outlined below cannot be collected, the applicant is not eligible to be enrolled in either the WIOA Adult or Dislocated Worker program. Applicants who would like additional information regarding Selective Service registration may be referred to this website: https://www.sss.gov/Registration-Info.

Required to Register (All elements must be true)	Not Required/Exempt from Registering (Any one of the elements must be true)
1. Sex-assigned male at birth 2. US Citizen OR immigrant residing in the US between the ages of 18 and 25 3. Age 18 or older 4. Born on or after January 1, 1960	1. Sex-assigned female at birth 2. Born before 1960 3. Under the age of 18 4. A seasonal agricultural worker on a H-2A visa 5. A lawful non-immigrant on a current non-immigrant visa 6. Was incarcerated / hospitalized / institutionalized continuously between 18th and 26th birthdays 7. Was not living in the United States between 18th and 26th birthdays 8. Was on active US Military, Coast Guard duty or a student in an Officer Procurement Program continuously between 18th and 26th birthdays

Documentation Types are defined by the requirement to register and whether the applicant registered or did not register for the Selective Service:

IF Requirement is	AND Registration Status is	Then Documentation Types must be one of the following
Required	Registered	• Selective Service Registration Acknowledgement Letter • Selective Service Registration Card • Stamped Post Office Receipt of Registration
	Not Registered: Applicant was unaware of the requirement to register and is now age 26 or older.	• Request for Status Information Letter & Supporting Documentation • Selective Service Status Information Letter
	Not Registered: Applicant willingly and lawfully chose not to register.	No document and applicant is not eligible.
Not Required/Exempt	Not Required to Register	• Signed Application (Age/Sex at Birth) • DD-214 Military Separation Record • Immigrant/Non-Immigrant Allowable Documents (refer to Appendix 1) • Records of Incarceration/ Hospitalization/ Institutionalization

Additional Selective Service Registration Notes

Incarceration/Hospitalization/Institutionalization

Applicants who were required to register but can provide documentation that they were incarcerated, hospitalized and/or institutionalized from their 18th birthday to their 26th birthday are exempt from registration. **However, please note**: If at any time between their 18th and 26th birthday the applicant was not incarcerated, hospitalized or institutionalized then they were required to register, and the exemption does not apply. If the applicant did not register, then follow the requirements for documenting under “Required to Register and Did Not.”

Military Service
If the applicant was in the US Military, Coast Guard or Officer Training between their 18th and 26th birthday they are not required to register and their DD-214 Military Separation Record is the documentation. **However, please note**: If at any time between their 18th and 26th birthday the applicant was not in the US Military, Coast Guard or Officer Training, then they were required to register, and the exemption does not apply. If the applicant did not register, then follow the requirements for documenting under "Required to Register and Did Not."

Required to Register and Did Not
Applicants who are required to be registered, who are over age 26, and cannot document that they are registered through one of the means listed above must complete the Selective Service System's *Request for Status Information Letter* and attach copies of the documentation required for their reason for non-registration.

Where the *request is completed and not yet submitted* – A copy of the letter and supporting documents is to be provided to WorkSource, and a WIOA Title I program manager must review it to determine that the applicant has established by a preponderance of the evidence that the failure to register was not knowing and willful. If this determination is made the Request for Status Information Letter and documents are to be filed with all other eligibility documentation with the WIOA program manager approval signature, and the choice "Request for Status Information Letter & Support Documentation" selection in I-Trac is to be used.

The applicant should be instructed to submit the Letter and documents as directed on the form for a formal determination by the Selective Service System. **Note**: It is not required that staff follow-up to assure the submission occurs nor is it required that the Selective Service System response be returned and filed. The WIOA program manager is authorized to make the determination at the time of WIOA documentation.

Where the *request has been submitted and the Selective Service response received* – If the applicant already completed the Status Information Letter Request process with the Selective Service and has their Status Information Letter determination returned from Selective Service which says that they are found to be exempt from the requirement, a copy of the Response Letter is to be maintained as documentation and "Selective Service Status Information Letter (returned from Selective Service)" selection in I-Trac is to be used.

Dislocated Worker
If a participant is deemed eligible as a Dislocated Worker, participant attestation at registration of the qualifying dislocation date is accepted. The Dislocated Worker designation must be reflected in the WSO Registration Tab data in I-Trac.

Priority of Service Documentation
Veteran's status and Low Income/Public Assistance receipt provide participants with WIOA priority of service consideration when that status can be documented as outlined below. *Lack of documentation does not preclude participants from receiving Individualized Career Services or Training* but does eliminate the priority of service benefit. Documentation requirements to be considered for Priority of Service benefits are:

Veteran Status
A photocopy of the DD-214 Military Separation Record is required. If no document is provided *services can be provided* but the participant will not report at the Federal level as a Veteran and priority of service will not apply.

Low Income
Participant attestation is accepted and must be reflected in the WSO Customer Registration maintained in WOMIS.

Public Assistance
All types of public assistance (TANF, General Assistance, Refugee Cash Assistance, Food Stamps, SSI) require a photocopy of the verification from Oregon Department of Human Services. The verification must be in the participant's name. If no document is provided *services can be provided* but the participant will not report at the Federal level as having the characteristic and priority of service will not apply.

Deficient in Basic Skills
Adults seeking services through a WorkSource Center or one of the Economic Opportunity Programs will be assessed to determine their basic skill level at the point of program eligibility determination and enrollment. Participants who are determined to be Basic Skills Deficient will receive WIOA priority of service considerations. Basic Skills Deficient is defined as:

> Unable to compute or solve problems, or read, write or speak English at a level necessary to function on the job, in the individual's family, or in society. This may be determined by staff during the enrollment process while working with the applicant when at least one of the following elements are observed (and therefore assessed):

- Is enrolled in a Title II Adult Education and Family Literacy Act program, this also includes enrollment in English as a Second Language (ESL) class.
- Determined to be Limited English Skills proficient through staff-engagement and observation.
- Staff make observations of deficient functioning in completing forms, assisting in the development of a service strategy, or behaviors in group discussion settings.
- Information (in writing or through discussion with the participant) that an educational institution the participant engages or engaged with determined them to have a GPA at D or below within the previous six months.
- Qualifies for Special Education services or has an Individual Education Program (IEP) plan.

This assessment by staff is to be noted in the appropriate section of the Eligibility Documentation Checklist WIOA Adult/DW. If no basic skills deficiency is noted *services can be provided* but the participant will not report at the Federal level as having the characteristic and priority of service will not apply.

For purposes of participant co-enrollment across local workforce areas in Oregon, WorkSource Portland Metro will accept a basic skills deficient assessment/determination by any other Oregon local workforce area contractor.

WIOA Eligibility Documentation Checklist

The checklist is designed to ensure the documentation required by the US Department of Labor for WIOA Adult/Dislocated Worker eligibility and priority of service is properly collected and maintained. The documentation supports the correlating data elements in the customer registration system at the time documentation was verified and collected. Complete the checklist as documents are collected and uploaded. The Eligibility Documentation Checklist WIOA Adult/DW can be found on the Knowledge Base.

Documentation information is maintained in I-Trac in the Documentation tab. As documents are collected and uploaded, the appropriate information is entered into the I-Trac record. When the Documentation Results control reflects no missing information, the Documentation Completion control can be data-entered, and the Documentation tab will lock.

The documents are to be maintained in this order in the participant file, which must be stored in a secure (locking) file or secure, password protected electronic file at the location where enrollment occurred:

- Completed documentation checklist.
- Document(s) that did not have I-Trac upload available (if any).

Step 3: Prosperity 10K Eligibility Determination and Documentation

- Aged 16 years or older. (**Note** 16- and 17-year-old applicants are not eligible for PCEF.)
- Priority is to be given to residents of the state of Oregon.

Enter all data into the Registration Tab in the I-Trac Prosperity 10K enrollment record and determine Prosperity 10K eligibility in the Registration Results.

Documentation for Eligibility requirements is applicant attestation obtained through their signature on the program Application. Obtain applicant signature utilizing the eSignature process in I-Trac. If an eSignature is unable to be obtained print the application from the I-Trac Customer Documents menu for signature and upload to I-Trac.

Enrollment

The applicant must begin participation in Prosperity 10K services within 45 days of registration to be enrolled.

Step 4: PCEF Eligibility Determination and Documentation

Age

Review the Birthdate document collected for WIOA Documentation and determine it reflects a birth date that supports the applicant is at least 18 years old is required.

Residency

County residency is validated when the county data element is auto populated in I-Trac on the Registration Tab when entering the applicant’s full address, including zip code. A participant’s attestation to this county residency is obtained through the participant’s signature on the I-Trac Application.

Obtain applicant signature utilizing the eSignature process in I-Trac. If an eSignature is unable to be obtained print the application from the I-Trac Customer Documents menu for signature and upload to I-Trac.

Enrolled Participant
Once all elements of eligibility determination and registration have been completed, the applicant must begin participation in program services within 45 days of the registration date. Participation begins with the first PCEF in-program phase service entered into I-Trac.

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the applicant understands their rights. The participant will acknowledge receipt of these disclosures when they sign the Application. No copies of the forms need be maintained in the customer file.

Social Security Number (SSN) Disclosure
A participant's SSN is required for their inclusion in some performance cohorts. Participants must be provided the disclosure (Standard SSN 2018-03-01) that describes how their SSN will be used and the program's commitment to confidentiality. Where the participant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the Application for Services and the consent is the participant's signature on the application.

EEO/Grievance Disclosure
The Equal Opportunity Statement and Grievance Procedure (October 2017) is to be given to the participant during the eligibility determination interview meeting. Reasonable efforts should be made to assure that the information and complaint procedures are understood by potential participants.

Ineligible Customers

Applicants who do not meet the PCEF eligibility requirements for enrollment are to be referred to other programs in the local area that may be available to provide similar services. WorkSource Center services must be reviewed and discussed, with a direct referral to the WorkSource Center most convenient for the applicant and the link to MyWorkSource for additional service options provided. Formal referrals to community organizations are not required.

All costs associated with participants found to be ineligible after receiving program-funded services will be disallowed.

Transferring Participants

Participants may be transferred from one PCEF service provider to another PCEF service provider when it is in the best interest of the participant. When a transfer occurs, the current service provider must:

- Confirm in writing from the participant that they agree to the transfer and document through a case note in I-Trac.
- Obtain approval from the current PCEF Program Manager and transferring PCEF Program Manager. This is documented in the transfer record in I-Trac on the Outcomes Tab.

- Complete a case note as to the reason for the transfer.
- Upload to I-Trac all eligibility and performance documentation obtained prior to the transfer date.
- Enter a transfer record on the Outcomes Tab in the PCEF I-Trac record.

All eligibility documentation for the PCEF enrollment remains the responsibility of the service provider that collected and validated the documents. If there are eligibility documentation questions that arise during monitoring that lead to questioned or disallowed costs, the service provider that managed the eligibility documentation process is responsible for the questioned/disallowed costs. All performance is the responsibility of the new service provider.

Program Design and Service Delivery

Service delivery and the subsequent performance will happen during two distinct program phases: In-program and follow-up services. Refer to the section Service Definitions in these regional program standards for additional detail.

In-Program Services

During in-program services participants receive career coaching designed to support them in overcoming barriers to employment and achieve their employment and career goals. Services occur from the point of PCEF eligibility and enrollment until a participant obtains employment that meets their career plan goals, at which point they are assessed as ready to transition to follow-up services. In-program services will also cease when 90 days has elapsed without a service being provided and documented in I-Trac, and the participant will be automatically moved to follow-up. The transition to follow-up date (Exit Date) is always the date of the last in-program service.

Follow-Up Services

Follow-up services are designed to assist participants in stabilizing their employment, identify employment advancement opportunities and/or secure new employment that is in line with their career plan. follow-up services begin at the point of transition from in-program Services (exit) and will continue for a period of one year. Employment information and confirmations are tracked during follow-up.

Service Definitions

Career Coaching

PCEF provides industry specific occupational career coaching in the Clean Energy sector which includes but is not limited to energy, buildings, transit, transportation, manufacturing and water infrastructure. It assists participants in job placement in the clean energy sector that help reduce our greenhouse gas emissions including janitorial services, regenerative agricultural work and environmental remediation and restoration.

Career Coaching is typically delivered as an individualized service and is relationship-based guidance and coaching dedicated to increasing the self-sufficiency of participants through unsubsidized employment. It includes assessment of employment-related skills, identification of achievable career and training goals and development of an achievable career plan (see Career and Resource Plan Development). Career Coaches support participants in execution of the plan and attainment of their goals by building a relationship of support and accountability. Best practices show that participants who maintain periodic communication with a Career Coach are most likely to benefit from services.

Elements of Career Coaching include:

- Assist in identifying career and education goals.
- With the participant, develop a plan that incorporates a customized set of WorkSource services and outside resources that will assist them in meeting their goals.
- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment.
- Assist participants in identifying and securing the resources and support necessary to succeed in their training and career plans.
- Facilitate collaboration between the different service providers working with the participant to synchronize career and education goals and align resources.
- Coach participants in job search activities, including resume review, interview coaching, and career advising.
- Provide regular check-ins to track participant progress and ensure participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.
- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on participants' needs.
- Assist participants to access rent assistance resources to support their employment and career plan.

Another element of Career Coaching is conducting Career Planning Sessions – refer to Career and Resource Plan Development for more detail.

Career Coaching is provided during both in-program and follow-up services. Career Coaching services that are funded with WIOA or Prosperity 10K funds are copied to the participant's WSPM Adult/DW and/or Prosperity 10K record.

Career Coaching – Dual Coaching

EOP participants may simultaneously receive Industry Specific Occupational Coaching and Career Coaching through PCEF from different staff when they express interest and are assessed as ready to participate through multiple programs designed to support their industry-specific training completion. Prior to dual coaching, participants must meet the eligibility requirements and be fully enrolled in all the grant-funded programs.

To ensure participants meet their employment and training goals both Career Coaches must:

- Define, review, and inform participant of their individual roles.

- Coordinate, review, and regularly update participant's Career Plan. The Career Plan must be shared with all the participant's coaches after each revision using the I-Trac File Exchange secure communication method. Coordinate participant's access to all services and resources available through all programs.
- Establish and maintain regular communication regarding participant progress. Communication must be case noted in I-Trac within five days.

Career Exploration

Industry-specific career exposure to training and employment opportunities in the clean energy sector. Exposure is designed to help participants develop knowledge of the variety of careers and occupations including skill requirements, working conditions, and job opportunities in the clean energy sector. Useful tools are Careers NW, a Worksystems-sponsored website and Oregon Employment Department's qualityinfo.org.

Career Mapping

This workshop is the first step of the career mapping process. Participants identify their strengths, gifts, capacities, and qualities that will enable them to be successful in the work environment and potential jobs.

After the workshop, the Career Coach meets individually with participants to create a Career and Resource Plan that articulates these goals, identifies resources and outlines next steps. Refer to the Career Mapping Manual for additional information and detail.

Career and Resource Plan Development

The Career and Resource Plan is to be completed within the first 90 days of program participation and is developed with each participant using the Career Mapping process. The Plan documents career interests, strengths and challenges, short- and long-term education and employment goals and the steps and supports needed to meet these goals.

Prior to Plan development, appropriate assessments should be conducted to provide critical information about the participant's career goals, interests, aptitudes, basic academic skill level, occupational skills, work history, work and college readiness, attributes, personal strengths, developmental needs, and support service needs. The analysis and application of this assessment information is critical to guiding and coaching the participant and assisting them to develop a realistic Plan to reach their career goals. During in-program services, the plan should be reviewed and updated at least every 180 days as the participant completes (or is unable to complete) activities as planned and should drive program participation.

Additionally, assisting the participant in creating a Prosperity Planner budget is an element of the Career Plan. This will help inform them on the type of salary they need to become self-sufficient, as well as provide the budget back-up for any support services necessary to assist them through their service and training activities. For some, achieving self-sufficient wages is a process and Career Coaches play an important role in informing participants about structured advancement opportunities that support their goals and attaining self-sufficiency wages.

The Plan is a dynamic document that will change as the participant is provided opportunities to explore optional careers of interest, through meetings in which the participant receives advice and guidance and through a variety of work and community-based experiences exploring a range of occupational areas. The plan should be developed as a professional collaboration between the participant and Career Coach.

Job Search Assistance

Coaching to or teaching strategies which can be used to increase job search effectiveness. Assistance may include a variety of strategies for conducting on-line job searches, networking, and the role of resumes, cover letters, and interviews in a successful job search. Service can be provided one-on-one or in a group setting.

Job Search Assistance is provided during both in-program and follow-up services. Job Search Assistance services that are funded with WIOA or Prosperity 10K funds are copied to the participant's WSPM Adult/DW and/or Prosperity 10K record.

Work Readiness Training

Instruction designed to increase a participant's workplace skills that includes positive work behavior and employability soft skills training.

Training, Post-Secondary Education and Employment Skills

There are three categories of Training, Post-Secondary Education and Employment Skills services offered through the PCEF program– Classroom and Cohort Training, Pre-Apprenticeship Programs and Workforce Preparation. All payments for Training, Post-Secondary and Employment Skills services are entered in I-Trac on the Payments Tab in the Training & Education Service Payments control. All Training, Post-Secondary Education & Employment Skills services must be in the clean energy sector.

Classroom and Cohort Training

All Classroom and Cohort Training services must be funded through WSPM. The training program must either be on the Portland Metro Eligible Training Provider List (refer to WorkSource Portland Metro regional program standards for additional information) and identified as an approved clean energy sector training, or the training must have been procured for following Worksystems' procurement policy. The training may be offered through a school or training organization on a per-student basis or offered through a cohort agreement with Worksystems. Classroom and Cohort Trainings place the participant in the denominator for WIOA Measurable Skill Gains and Credential performance. All Classroom and Cohort Training services are funded through the WSPM system and include:

Occupational Skills Training

The training must be an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Occupational Skills Training must:

- Be on the Portland Metro Eligible Training Provider List (ETPL) and identified as an approved clean energy sector training.
- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the Training Plan.

- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, DOL-defined credential.

Pre-Requisite Training
Any class or training that is required by the training provider prior to enrolling into a training program that is represented on the Eligible Training Provider List (ETPL) and identified as an approved clean energy sector training. This excludes activities defined under Workforce Preparation. The training program on the ETPL must indicate the pre-requisite course is required for entry into the training program.

Eligible Training Provider List
The statewide roster of training programs and providers specifically certified by the State to meet the requirements of the WIOA. The Local Workforce Development Board establishes a WSPM ETPL that is a subset of the State's ETPL, and lists training programs directly linked to in-demand occupations in the local area that provide a career path leading toward self-sufficiency. Training on the WSPM ETPL note which are allowable to be funded with WIOA and other discretionary funds and which may only be funded with non-WIOA discretionary funds. All classroom training funded through WSPM must be on the WSPM ETPL. Refer to WSPM regional program standards for more information.

Individual Training Account (ITA)
A financial obligation by A WSPM Center to support classroom-based training or instruction in a program that is on the ETPL. ITAs may include the costs of tuition, related course fees (e.g., school, lab) and books required for the training program. Refer to WSPM regional program standards for more information and requirements for an ITA.

Training Completer
A participant who completes a planned *program* of training with a "complete" or "pass" designation from the school. Training completion must be reflected in the I-Trac record with a service end date and status of Completed. The training end date is the last date the participant attended any service provided as part of that training program, including the dates of examinations if they were provided as part of the service. Credentials obtained by completing training must be entered in I-Trac and a copy uploaded to the I-Trac participant record.

Pre-Apprenticeship Training Program

A program designed to prepare participants to enter and succeed in a Registered Apprenticeship Program. Pre-apprenticeship programs are Oregon BOLI registered and should have at least one, if not more, documented partnership(s) with a Registered Apprenticeship Program that will assist in placing participants who complete the pre-apprenticeship program into their Registered Apprenticeship Program. Pre-Apprenticeship Programs are not required to be on the ETPL and do not place the participant in the denominator for WIOA Measurable Skill Gains and Credential performance. Pre-Apprenticeship Program services are not required to be paid for through WSPM.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for the successful transition into and completion of postsecondary education or training, or successfully entering employment. Activities may include but are not limited to computer literacy, forklift operator, flagger, OLCC certificate, first-aid required for an employment position, food handlers' certificate and other occupational skills education leading to non-DOL defined credentialed certifications that are required for entry level, health or safety employment requirements. Workforce Preparation services are not required to be on the ETPL and do not place the participant in the denominator for WIOA Measurable Skill Gains and Credential performance.

Work Based Training

There are two categories of Work Based Training – On-the-Job Training and Work Experience.

On-The-Job Training (OJT)

The purpose of On-the-Job Training (OJT) is to assist businesses in training skilled, productive workers. OJT's may be used to help train newly hired employees and employees hired to regular permanent employment through a staffing service relationship. An OJT is an agreement between the WorkSource program and an individual employer who agrees to act as a training provider. The OJT is a hire-first program; the trainee is hired as an employee of the company, a training plan is developed to outline the skills the trainee is lacking to be proficient in the position, and the employer agrees to provide the necessary training on the job to bring the trainee up to entry-level standards for the position. The employer is compensated for the extraordinary costs and decreased productivity associated with training the participant.

Refer to OJT regional program standards and the OJT development manual for additional detail and requirements.

Work Experience

Work Experience (WEX) services provide participants with career exposure, opportunities to practice workplace skills and work ethic and, in some instances, provide a re-connection to the workforce. A WEX is a planned, structured short-term learning and training experience that takes place in a business worksite and involves work that is defined by a written, signed training agreement with the worksite. The agreement outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained. A WEX worksite may be in the private for-profit, non-profit, or public sector.

Work experiences are an employer-employee relationship with the participant and a wage is paid. The Internal Revenue Service Fair Labor Standards Act applies. All participants must complete all employer of record-required documents and processes, including but not limited to: W4 (both Federal and State) and Form I-9 and Verification.

All Work Experience (WEX) services are funded through the PDX Metro Works program. Services provided through the PDX Metro Works program are to be coordinated with the program staff. Please refer to the PDX Metro Works regional program standards for detailed information, policy and procedures related to work experience services.

Administrative Rules

WEX services are to be:

- No more than 40 hours per week (no overtime).
- A maximum of 240 hours for the total WEX training.
- Paid at the current minimum wage for the Portland Metropolitan area. No WEX will pay a wage less than the area 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 steps are to be completed to begin a WEX service:

- The participant's completed resume is submitted by the career coach to the WorkSource Liaison.
- The participant meets with the WorkSource Liaison who will assess readiness for a WEX service and, if accepted, will submit the resume to the WEX Specialist.
- The participant completes a screening with the WEX Specialist.
- The participant completes the hiring process with the approved Employer of Record, including completion of the Form I-9 and document verification. The hiring process must be completed before a participant can begin a WEX.

Support Services

Support services are financial assistance to offset expenses necessary for a participant to engage in PCEF 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).

Prior to considering support service payments, efforts must be made to identify resources in the community or from other grant funds 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 PCEF services.

Prerequisites

- Enrolled in the PCEF program.
- A completed Prosperity Planner budget saved to I-Trac record that supports need.

Administrative Requirements

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.

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 is required with the fiscal documentation file.

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

Administrative

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.

Support Service Definitions

Books and Fees

Costs associated with required books, school supplies and fees for participants enrolled and officially registered in post-secondary education or training, including testing fees, or books and fees required for occupational skill training.

> ***Required Documentation***: The original store receipt, school record or test receipt (for fees) that reflects an itemization of the purchased items.

Child and Dependent Care

Childcare costs are for a child(ren) age 12 and under during the time the participant is engaged in program services — including travel to and from the service delivery site. Due to the high cost and limited resources this support should only be considered on a case-by-case basis.

A spouse, sibling, or other family member residing within the same household may not be paid with Support Service funds to provide childcare for the participant's children. Costs for care of an individual age 13 or over may only be paid if there is a documented disability stating the individual may not be left alone.

Required Documentation: A care log (completed by the participant and signed by the care provider verifying dates, times, and cost) is to be used to track the costs being reimbursed. The log must be retained in the financial documentation for the payment.

Clothing/Personal Care

Clothing and/or related footwear or incidentals (including grooming and hygiene products) for interview, 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.

Credit Repair

Credit counseling and other services necessary to assist participants with critical skills related to household budgeting, managing money, accessing a personal credit report, and resolving personal credit problems that will contribute to the participants' work readiness. Credit repair services are to assist the participant to be ready to enter training, job search and/or maintain employment. Whenever possible, community resources should be utilized.

This assistance does not include the payment or modification of a debt.

Required Documentation: The original receipt that reflects an itemization of the services provided and associated cost.

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.

Housing Assistance

To support and contribute to the participant's readiness to enter training, education, or employment, assistance with housing costs may be provided.

To be considered for housing assistance support, staff must determine that the situation would impede the participant's ability to conduct an efficient job search, maintain employment or participate in training without the housing payment assistance, and that the participant has a plan for future payments.

Where community resources are available and the participant eligible, those resources must be used before support service payments can be utilized.

Housing Payment

Grant funds may be used to assist with housing payments (current and arrears) that will contribute to the participants' readiness to enter training, education, or employment.

> ***Note***: WIOA funds may not be used to pay late fees associated with past-due rent or mortgage payment.
>
> CDBG funds may not be used to pay any mortgage expense.

Required Documentation: Clear verification (copy of rental agreement, mortgage statement, voucher or detailed receipt) of charges due and participant residency is required. For mortgage assistance the participant must be one of the named borrowers/homeowners on the mortgage statement. For rent assistance, the address on the lease must match the participant I-Trac record if the participant is not named on the lease agreement. Payment must be made to the leaseholder/owner or mortgage holder.

Housing Stability Education

Grant funds may be used to pay the costs associated with community housing stability education services that will contribute to the participants' work readiness through stabilized housing.

Required Documentation: An invoice from the community service provider is required. Payment must be made directly to the education provider.

Moving Costs

Payments for services or items necessary to move into stable housing may be considered and approved. Examples include but may not be limited to: Application and move-in fees, security deposits, motel vouchers for temporary housing, fees for access to Community Warehouse, household items, temporary storage unit costs, U-Haul or similar truck or van rental to move furniture. Whenever possible, community resources such as Goodwill and Community Warehouse should be utilized.

Required Documentation: Direct payment from an invoice to landlord/rental company or itemized receipt from the motel, store or merchant where the purchase was made.

Laptop Computer

Purchase of a basic laptop computer when needed to participate in program services, engage in training or secure and/or maintain employment (when not provided by the employer or training provider).

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

Legal Services

When necessary to assist a participant in expunging a criminal record or to maintain legal to work documentation to secure employment or participate in a training. Where community resources are available and the participant eligible, those resources must be used before support service payments are utilized.

Required Documentation: Itemized invoice that clearly details the services provided and the published rate for the service. Payment must be made to the vendor.

Medical/Dental/Optical
This Includes medical/dental/optical testing/treatment, prescriptions, mental health testing, counseling. Funds may only be used for co-payments and expenses of the participant and cannot be used for costs of family members. Due to the high cost and limited resources, efforts should be made to first utilize Oregon Health Plan, County health care resources, and/or sliding scale fee structures with providers and support service should be limited to the minimum required to permit the person to participate in training, job search, accept employment, or maintain employment.

Note: WIOA funds cannot be used for drug-use testing.

Required Documentation: Co-payments may be reimbursed to the participant and require a receipt from the health care/service provider showing the date and amount of payment. All other payments must be made directly to the health care/service provider based on an original detailed invoice (no statements)

Professional Test/License/Organization Fees
When professional licenses/certifications/test/test preparation fees or membership/professional event registration are required or necessary to ensure a participant obtain employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses; 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).

Relocation
When a participant accepts a job offer at a location out of Multnomah or Washington County and more than 50 miles away, grant funds may be used to share in the cost of moving to that location (e.g., U-Haul costs, etc.).

Required Documentation: A written, bona fide job offer must be documented to qualify for relocation support. Original receipt(s) of all approved relocation expenses must be maintained with the payment record.

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., 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.

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 then 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. If appropriate staff may require the participant engage in a bicycle safety class or may purchase a child's helmet or seat if the bicycle transportation is being used to drop children at school or child care to allow participant to work or attend training, 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.

Parking

When necessary, to enable the participant to engage in career services or training activities (e.g., college campus parking fees).

> ***Required Documentation***: Original receipts that reflect a location and time in line with approved service provision (i.e., a class schedule).

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.

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 expense.

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.

Stipends

A stipend is a sum of money paid to participants to help cover basic costs while they engage in eligible Portland Metro cohort training. A training cohort is defined as one group of participants enrolled in and attending the same training sessions together. All participants in the single training cohort must receive identical stipends. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the training program. Every stipend awarded must have a clear connection to a specific participant goal as documented in their Cohort Training Application. There must be clear goals and expectations set forth as to what the participant must do to earn a stipend.

Cohort training programs that include a stipend will have business processes outlined that publish the stipend payments available and the requirements for receiving the stipend and will comply with these regional program standards requirements.

Any participant receiving a stipend must complete a W-9 form. Participants receiving more than $599 in stipend payments will be issued a 1099 for tax reporting purposes.

Administrative Rules

Service providers must establish a written process for paying stipends to ensure proper and consistent application of policy and that fiscal procedures are followed. At minimum, these procedures must address the following requirements:

- Service providers must follow business processes and procedures established by Worksystems for stipend-allowable activities and related stipend amounts.
- Each stipend payment must include a record of the participant's engagement such as confirmation from the training provider of attendance, a certificate of training completion or credential. If none of these confirmation types are possible for a participant in a virtual training, the participant may provide a screen shot that shows their attendance in the relevant remote classroom. Staff must include a case note in the I-Trac record which outlines why the required documentation is not possible and justifies using the screen shot option.
- Stipend payments are to be paid by check payable to the participant, direct deposit into an account in the participant's name or via pay card through a payment system where a specific pay card is assigned to a participant. Gift cards, gift certificates or retail vouchers cannot be used as stipend payment.
- Participants are required to sign an acknowledgment of receipt of the stipend. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt. Where pay cards are used, the signature is to be captured at the point the pay card is given to the participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign. Further stipend payments to the pay card do not require additional signature as it's treated as a direct deposit.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.
- Stipends paid with PCEF contract funds are to be entered into the I-Trac Stipend Payments control.

Performance

PCEF Performance Measures

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry PCEF Record
Placed in unsubsidized employment in a Clean Energy Related career (definition below) **Acceptance into a Registered Apprenticeship program**	Number of enrolled participants placed in unsubsidized employment or Registered Apprenticeship program in a Clean Energy Related Career.	Between participation date and end of Q4 after exit date.	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** Obtained Clean Energy Related Employment or placed in Registered Apprenticeship program.
PCEF Employer Priority Target – PCEF Connected Employer (definition below)	Number of enrolled participants placed in unsubsidized employment in a Clean Energy Related Career with a PCEF connected employer.	Between participation date and end of Q4 after exit date.	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** Obtained Clean Energy Related Employment – PCEF Employer.
Retention in Clean Energy-related employment 6 months following placement	Number of enrolled participants placed in unsubsidized employment in a Clean Energy Related Career who retain employment 6 months following their employment start date.	Between participation date and end of Q4 after exit date.	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control **Confirmation Type** 6-month Clean Energy-Related Employment.

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry PCEF Record
Retention in Clean Energy-related employment 12 months following placement	Number of enrolled participants placed in unsubsidized employment in a Clean Energy Related Career who retain employment 12 months following their employment start date.	Between participation date and end of Q4 after exit date.	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** 12-month Clean Energy-Related Employment.
Training Starts	Number of enrolled participants with a training or work-based training service with a status of started.	Between participation date and exit to follow-up date.	Quarter of service start date.	**Services Tab** Training, Post-Secondary Education & Employment Skills control.
Training Completions	Number of enrolled participants with a training or work-based training service with a status of completed.	Between participation date and exit to follow-up date.	Quarter of service end date.	**Services Tab** Training, Post-Secondary Education & Employment Skills control.
Training Completers Employment Placements	Number of enrolled participants with a training or work-based training service with a status of completed who have an Obtained Clean Energy Related Employment Confirmation.	Between participation date and end of Q4 after exit date.	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** Obtained Clean Energy Related Employment.

WIOA Performance Measures

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry WIOA Record
Employment Rate (Q2)	**Denominator** All WIOA enrolled participants. **Numerator** Participants employed during the second quarter following the exit quarter.	Q2 after exit	Q4 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** Q2 after exit.
Employment Rate (Q4)	**Denominator** All WIOA enrolled participants. **Numerator** Participants employed during the fourth quarter following the exit quarter.	Q4 after exit	Q6 after exit	**Outcomes Tab** Employment Placement and Confirmation control. **Confirmation Type** Q4 after exit.
Credential Attainment (Refer to the WSPM regional program standards for Credential definitions.)	**Denominator** All WIOA enrolled participants engaged in an education or training service at any time during participation (does not include OJT or Customized Training). **Numerator** Participants that attain a DOL-recognized credential between participation date and one year after exit date.	One year after exit	One year after exit	**Services Tab** Secondary Education & Skills control or Training, Post-Secondary Education & Employment Skills control. **Outcomes Tab** Credentials control.

Note
A participant who attains a High School Diploma or GED can only be counted in the Numerator if they are employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential within one year after exit

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry WIOA Record
Measurable Skill Gain (Refer to the WSPM regional program standards for Measurable Skills Gain definitions.)	**Denominator** All WIOA enrolled participants engaged in a Secondary or Post-Secondary education or training service that leads to a recognized post-secondary credential or employment. **Numerator** Participants that achieve a measurable skill gain.	By June 30 for every program year participant engages in a training or education service.	Program year Q4	**Assessment Tab** Measurable Skill Gain control.

Note
A measurable skill gain is defined as documented academic, technical, occupational or other forms of progress towards the credential or employment.

Prosperity 10K Performance Measures

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry Prosperity 10K Record
Percentage of participants who identify as women	**Denominator** All Prosperity 10K enrolled participants. **Numerator** Participants whose gender is Woman.	Quarter of participation date	Quarter of participation date	**Registration Tab** Gender is Woman.
Successful Program Completion	**Denominator** All Prosperity 10K enrolled participants. **Numerator** Participants with an Exit Successful program status on the Outcomes Tab. **Note** Exit Successful is defined as those who obtain employment or complete any of the following services by their exit date: • Occupational Skills Training • Pre-requisite Training • Workforce Preparation • Pre-apprenticeship Training Program • Work Experience • Career Coaching	Between participation date and exit date	Quarter of exit date	**Outcomes Tab** Program Status Exit - Successful.

Performance Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry Prosperity 10K Record
Employment Rate	**Denominator** All Prosperity 10K enrolled participants not employed at Registration. **Numerator** Participants that obtain employment by Full Program Exit date with an After Participation Employment Confirmation in I-Trac.	Between participation date and full program exit date	Quarter of employment start date	**Outcomes Tab** Employment Placement and Confirmations control. **Confirmation Type** After Participation Employment Confirmation.
Employment at $17/hour or more	**Denominator** All Prosperity 10K enrolled participants who obtain employment. **Numerator** Participants that obtain employment by Full Program Exit date with a wage rate of $17/hour or higher – all participants with an After Participation Employment Confirmation in I-Trac where Hourly Pay is $17 or more an hour	Between participation date and full program exit date	Quarter of employment confirmation date	**Outcomes Tab** Employment Placement and Confirmations control. **Confirmation Type** After participation employment confirmation.

Additional PCEF 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.

Clean Energy Related Career

Includes but is not limited to energy, buildings, transit, transportation, manufacturing and water infrastructure. Jobs in the clean energy sector that help reduce greenhouse emissions including janitorial services, regenerative agricultural work and environmental remediation and restoration.

Data Entry Requirements

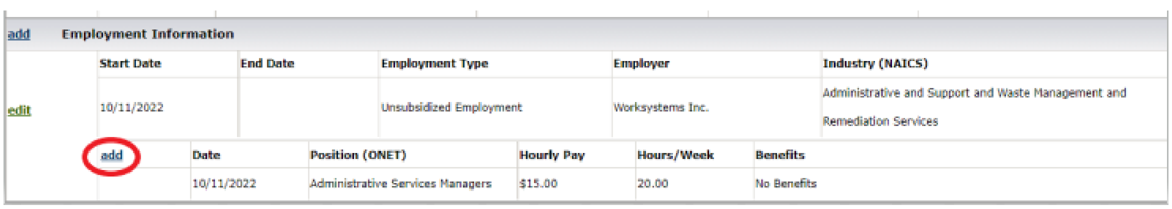
All program information is reported to funders through the I-Trac management information system. To ensure accurate and timely Federal, State and Local reporting, all data is to be entered in the appropriate I-Trac control within five business days of the activity, payment, credential attainment or receipt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

Employment Data Entry

Employment verification requires the collection of the following data in the Employment Information control on the Outcomes tab of I-Trac:

- Employment Start Date
- Employment Type
- Employer Name
- Industry (NAICS)
- Position (ONET)

Data entry in I-Trac is a two-step process. Enter the first line of Employment Information and then click the add button to enter the second line of information. Hourly Pay; Hours/Week and Benefit information is required to be entered.



For the verification to be reported and used in performance tracking, the employment must be confirmed and documented in the Employment Confirmation control in I-Trac. State UI wage match confirmations will automatically show in the Confirmation control when received from the State and may be used to verify employment without the detailed data described above.

Employment Placement

Contractor staff is responsible for collecting confirmation of employment details and entering the information into I-Trac on the Outcomes Tab. Communication from the participant of the confirmation details is acceptable; no additional documentation is required. Contractor staff are responsible for accurate accounting of earnings, hours and benefits information that inform performance measures. When participants auto-exit and contractor staff learn they became employed, staff should attempt to contact the participant and obtain the employment details.

- **Placed in Unsubsidized Employment**
  Placed in Unsubsidized Employment is defined as a participant obtaining employment in a clean energy related career. This includes acceptance into a State Registered Apprenticeship Program in a clean energy related career.

- **Employment Retention**
  Employment Retention is defined as participants that retain their clean energy related employment placement for 6 and 12 months.

Enrolled Participant
A customer who has completed the PCEF Eligibility and Registration process and has received one PCEF-funded service. For the service to count and trigger participation it must be entered into I-Trac.

Exits
Auto-Exit
When a participant has gone more than 90 days without a PCEF in-program service they will be automatically exited. The Exit date is the date of the last PCEF in- program service entered in I-Trac. After an Auto-Exit, only follow-up services can be provided.

Exit to Follow-Up
A participant is transitioned from the in-program Phase into the follow-up Phase when program participation goals listed in the Career and Resource Plan are achieved. Exit is manually entered in I-Trac, and employment information and confirmation are completed. After Exit only follow-up services can be provided.

Full Program Exit
At the end of one year of follow-up services, a participant is automatically fully exited from the program. This means they are no longer eligible to receive services funded by PCEF without completing eligibility and re-enrolling in a new enrollment episode.

Global Exclusion Exit Reasons
Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in PCEF services may be manually exited from the program. When a Global Exclusion type of exit is recorded the participant will not be included in any of the performance measure denominators.

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. Absolutely no medical details or institution name should be included in the participant file or I-Trac case note – just the notification information.

Portland Clean Energy Fund Connected Employer
A PCEF connected employer is any organization or business that will be performing work related to a PCEF funded project as either a direct awardee of funds from PCEF or as a subrecipient or subcontractor to a direct

awardee. PCEF connected employers are subject to meeting the PCEF wage standard. Worksystems-identified PCEF employers are listed in the PCEF quarterly report template.

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:

A. **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.

B. **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.

C. **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.

D. **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.

E. **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.

F. **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.

File Documentation

Requirement	Detail	Location
Signed Program Application	A completed and signed PCEF program Application is required. The application is developed from the participant registration data entered in I-Trac. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered, secure applicant signature and upload to I-Trac.	**I-Trac** Customer Documents
Career and Resource Plan	Original plan and updates.	**I-Trac** Services Tab-*Career and Resource Planning* service **Participant File** Career and Resource Plan
WIOA Employment Rate (Q2 and Q4 after Exit)	An I-Trac UI Crossmatch or one of the following documents: • Employment Leave and Earnings Statements • Employment Verification Letter on Letterhead • Follow-up Survey (Signed) • Income Tax Records • Pay Stub • Payroll Slip • Quarterly Tax Payment Forms • Sales Commission Worksheet • State Department of Revenue or Taxation Record • W-2 Form	**I-Trac** Customer Documents
Credentials	Copy of any Credentials earned from completion of a training service.	**I-Trac** Customer Documents
Measurable Skills Gains	See Measurable Skill Gain Definitions below.	**I-Trac** Customer Documents
Support Services financial need	Prosperity Planner budget if any support services are provided.	**I-Trac** Saved Prosperity saved Budget
Eligibility Documentation	Copies of required documents for eligibility and enrollment.	**I-Trac** Customer Documents