Regional Program Standards

Focus:	☒ WorkSource Centers ☒ Youth Program Services ☒ Other: Economic Opportunity Program	
Topic: Prosperity 10,000 Program		
Date: October 1, 2025	❑ New ☒ Revised	Page 1 of 26

Overview

Prosperity 10,000 (P10K) is a program of Future Ready Oregon, a comprehensive grant package that supports the need for living-wage careers. P10K is focused on advancing opportunities for historically underserved communities, including adult learners, dislocated workers, and youth.

Contents

Eligibility

Contractors must establish processes to determine Applicant eligibility and enrollment requirements for P10K as outlined below.

- Aged 16 years or older.
- Priority is to be given to residents of the state of Oregon.

Eligibility Determination and Documentation

Enter all data into the Registration Tab in the I-Trac P10K enrollment record and determine P10K 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.

Note: Applicants under the age of 18, Contractor staff must conduct due diligence to obtain parent/guardian signature for enrollment. Where a parent/guardian is absent, an applicant under the age of 18 may be enrolled without parent/guardian signature. Once confirmed that a parent/guardian is absent, the participant may sign the Application in place of a parent/guardian with a case note entered in I-Trac by the Career Coach to document this.

Enrollment

The applicant must begin participation in P10K services within 45 days of registration to be enrolled.

Service Definitions

Career Coaching

Youth and Adult Service

Career Coaching 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. 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.

Career Labs

Youth Service

Targeted courses of instruction in workplace skills needed for the participant to be work ready. Providers are encouraged to utilize Worksystems-approved Career Lab curriculum. Other tools are permissible if they fulfill the required learning objectives. Refer to the Knowledge Base for required learning objectives. Providers may enhance instruction in Career Labs with additional activities and may adapt parts of this curriculum to meet specialized needs of their participants. Recommended Career Lab topics include:

- Adaptability
- Communication
- Problem Solving
- Collaboration
- Self-Awareness
- Analysis/Solution Mindset
- Digital Fluency
- Entrepreneurial Skill Set
- Resilience
- Understanding Workplace Diversity

Career Mapping

Youth and Adult Service

This workshop is the first step of the career planning 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 Plan that articulates these goals, identifies resources and outlines next steps. Refer to the *Career Mapping Manual* for additional information and detail. Career Mapping must be completed with a participant within the first 90 days of program participation.

Career and Resource Planning

Youth and Adult Service

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 Workshop. 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.

During services, the plan should be reviewed and updated at least every 120 days as the participant completes (or is unable to complete) activities as planned and should drive program participation.

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.

Financial Literacy Education

Youth Service

Activities that teach participants how to create budgets, initiate accounts at financial institutions, and make informed financial decisions. Financial literacy education assists participants in learning how to effectively manage spending, credit, and debt – including student loans, consumer credit and credit cards. Activities also include educating participants on identity theft and ways to protect themselves. Lesson topics must include Banking Basics, Income and Employment, Budgeting, Consumer Skills, Credit and Debt, Financing Higher Education, and Insurance. It is recommended that each lesson take between 25 and 35 minutes to complete.

Service providers may consider using the Prosperity Planner (https://www2.prosperityplanner.org/) as an additional tool in support of financial literacy activities.

Job Search Assistance

Youth and Adult Service

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.

Learning Opportunity

Youth Service

Learning opportunities are a structured and short-term educational engagement with documented learning objectives. Participants can earn Stipends for participation in and completion of Learning Opportunities. At scheduled intervals the Career Coach assesses participant progress.

A Learning Opportunity cannot include activities typically done by an employee to the benefit of a business. An employer-employee relationship does not exist with Learning Opportunities. Participants are not working at a worksite and the Learning Opportunity is not considered a Work Experience service. Participants are not paid wages but are paid a stipend for participation in and completion of education or learning activities. Recommended Learning Opportunities include LinkedIn Learning courses, Metrix Learning courses and early career and job skill exposure activities. Other Learning Opportunities may be permissible at the discretion of the Community Referral Partner following the *Learning Opportunity Guidance* located on the Worksystems *Knowledge Base*.

A *Learning Opportunity Training Agreement* is used to establish the expectations and responsibilities of all parties when a participant is placed in a Learning Opportunity. The participant and the Career Coach collaboratively determine the goals and expected professional development of the participant and complete the learning agreement. The agreement must include the type of Learning Opportunity, weekly check in schedule, learning objectives and the maximum amount of stipend that can be earned. The agreement must be signed by the participant, Career Coach, and the Program Supervisor **prior to** the start date of the Learning Opportunity service.

Completion of the Learning Opportunity is documented through verified attendance in a training or documentation of completion of the service such as a certificate or Credential. If neither are possible, the participant can complete a reflection exercise (video or written report) after completion of the activity. All changes to a *Learning Opportunity Training Agreement* must be documented with a case note in I-Trac.

Learning Opportunity Administrative Requirements

- *Learning Opportunity Agreements* are not to exceed $1,000. Exceptions can be made over $1,000 with approval of Worksystems.
- Participants must complete a W-9 unless they request and qualify for an exception by Worksystems.

> - ***Note**:* Participants who have not been granted an exception and receive more than $599 in stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.

Refer to the Stipend payments section of these *Regional Program Standards* and the *Knowledge Base* at https://help.worksystems.org/ for additional guidance.

Training, Education and Employment Skills Services

Youth and Adult Services

Training services may be needed when a participant requires new or upgraded skills to secure, retain or advance in employment in a demand occupation or growth industry that provides a career path leading to economic self-sufficiency. Worksystems invests in Training resources to prepare people for in-demand occupations in the following target industries: Clean Energy, Construction, Early Childhood Education, Healthcare and Manufacturing.

There are four categories of Training, Education and Employment Skills services offered through P10K – Occupational Skills Training, Pre-Apprenticeship Training Programs, Pre-Requisite Training and Workforce Preparation services. All payments for these Training services are entered in I-Trac on the Payments Tab in the Training & Education Service Payments control.

Occupational Skills Training

Occupational Skills Training is 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 Oregon, Washington, Idaho, or Utah State ETPL if utilizing WIOA funds (defined below).
- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the participant's Training Plan. The occupational goals must be on the Portland Metro area Target Occupation List (see below for definition of this list).
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, US Department of Labor-defined Credential.

Training may be offered through a school or Training organization on a per-student basis or offered through a cohort agreement with Worksystems. A Training cohort is defined as one group of participants enrolled in and attending the same Training sessions together; additionally, the cohort Training must have been procured for following Worksystems' procurement policy.

Occupational Skills Training places the participant in the denominator for WIOA Measurable Skill Gains and Credential performance.

Prerequisite Training

Any class or Training that is required by the Training provider prior to enrollment in a Training program that is represented on a State ETPL. This excludes activities defined under Workforce Preparation. The Training program on the State ETPL must indicate the prerequisite course is required for entry into the Training program.

Pre-Apprenticeship Training Program

A program designed to prepare participants to enter and succeed in a Registered Apprenticeship Program. Pre- Apprenticeship Training 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 Training Program into their Registered Apprenticeship program. Pre-Apprenticeship Training Programs are not required to be on a State ETPL and do not place the participant in the denominator for either WIOA Measurable Skill Gains or Credential performance.

If a Pre-Apprenticeship Training Program service also includes elements of Occupational Skills Training, the service must be entered in I-Trac as both a Pre-Apprenticeship Training service and an Occupational Skills Training service. When entered as an Occupational Skills Training service the participant will fall in the denominator of the WIOA Credential and Measurable Skills Gain performance.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for successful transition into and completion of Post-Secondary 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, OSHA health and safety certifications and other occupational skills education leading to non-Department of Labor (DOL) defined credentialed certifications that are required for entry level, health or safety employment requirements. Workforce Preparation services are not required to be on a State ETPL and do not place the participant in the denominator for WIOA Measurable Skill Gains or Credential performance. Payment for workforce preparation does not require an Individual Training Account (ITA) Application. Utilize the Support Services payment type of Books and Fees.

Requirements to Start Training Service

Participants who want to receive Training, Education and Employment Skills services through WSPM must complete the following requirements:

- Consultation with WorkSource training/skills team staff.
- Completion of a Prosperity Planner Budget in I-Trac.
- Individual Training Account (ITA) or Cohort Training Application (as appropriate, not required for Workforce Preparation services).

Training Start Definition

The start date in a Training program is considered the first day that a participant attends the Training.

Training Completer Definition

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. Credentials obtained by completing Training must be entered in I-Trac and a copy uploaded to the I-Trac participant record.

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 Oregon, Washington, Idaho or Utah State ETPL. ITAs may include the costs of tuition, related course fees (e.g., school, lab) and books required for the Training program.

Individual Training Accounts (ITA) provide the scholarship for participants to complete Training programs. ITAs will be provided to eligible participants based on an individualized assessment of the participant's job readiness to obtain or retain employment that leads to economic self-sufficiency; their need for Training; financial need; and potential for successful completion, as documented on the participant's WSPM Scholarship Application.

- The Training program must be on the Oregon, Washington, Idaho or Utah State ETPL if utilizing WIOA funds.
- The Training must prepare participants for occupations on the Portland Metro Target Occupation List (defined below).
- The participant meets the qualifications and training prerequisites established for the Training program by the Training provider.

Funding for Training is limited to participants who are unable to obtain grant assistance from other sources or require assistance beyond what is available from other sources. WSPM Centers must consider the availability of all sources of funds to pay for Training costs such as TANF funds, State Training funds and Federal Pell Grants.
In coordinating the use of the different funds, WSPM Centers may consider the full cost of participating in Training services (using the Prosperity Planner budget), including living expenses, childcare, transportation, etc.

Individual Training Account (ITA) Documentation

All ITA Applications must be reviewed by the WorkSource Center's Training Review Team, and a Training Review Form must be completed and saved in the participant file.

State Eligible Training Provider List

The statewide roster of Training programs and providers specifically certified by the State to meet the requirements of the WIOA. All Training funded with an ITA utilizing WIOA funds must be on the Oregon, Washington, Idaho or Utah State ETPL and be related to an occupation on the Portland Metro Target Occupation List.

Portland Metro Target Occupation List

To ensure that Portland Metro Training investments have maximum impact for both job seekers and the local area's employers, Worksystems establishes a list of target occupations that forecast growth and opportunity and that are aligned with Worksystems' target sectors of clean energy, construction, early childhood education, healthcare and manufacturing. The Portland Metro area Target Occupation List focuses on investments and Training services on these identified occupations. As a result, Training services will be directly linked to in-demand occupations that provide a career path leading toward self-sufficiency. Target occupations will be identified as outlined below.

Identifying Target Occupations

Occupations must meet the following criteria to qualify as targeted occupations for investment.

- $21/hour Median Wage or above.
- Two or fewer years of post-secondary education.
- Anticipated growth over the next 10 years.
- 200+ jobs in the region.

From time to time there may be occupations that meet the criteria but are not included on the Portland Metro Target Occupations List based on relevant factors such as gathered industry intelligence. Target occupations will be reviewed and adjusted as necessary, based on changes in projected supply and demand and feedback from regional employers, Oregon Employment Department staff and partner organization staff.

Exceptions may be granted by Worksystems to fund an ITA for Trainings on the State ETPL that are not related to occupations on the Portland Metro Target Occupation List on a case-by-case basis. Worksystems will take into account the individual participant's work experience, career goals, and employment opportunities related to the Training when determining whether to make an exception. Exception requests must be submitted to the Worksystems Contract Manager via email for approval.

Work Based Training

Youth and Adult Services

On the Job Training (OJT)

On-the-Job Training (OJT) assists 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 who need additional training to meet the employer's minimum standards.

The OJT is an agreement between the WorkSource program and an 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 minimum requirements, 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 details.

PDX Metro Works

Adult Service

There are two Work Based Training services offered through PDX Metro Works: Work Experience (WEX) services and Paid Work Opportunities (PWO).

A WEX service provides participants with career exposure, opportunities to practice workplace skills and work ethic and, in some instances, provide a re-connection to the workforce. WEX services are intended to prepare a participant for future, unsubsidized employment, by matching participants with worksites committed to providing supportive supervision and mentorship in positions aligning with a participant's short- or long-term career goals. Participants with very limited work experience, making career changes, or with limited to no work experience in the target occupation are prioritized for services.

A PWO service is intended to match a participating worksite with a work-ready participant who is interested in and ready for placement in an entry-level employment position within a target industry.

Both a WEX and a PWO are planned, structured short-term experiences that takes place in a business worksite and involves duties that are defined by a written, signed Training Agreement with the worksite. The Agreement outlines the expectations and responsibilities of all parties and specifies the placement position, responsibilities, duties and maximum hours allowed. A worksite may be in the private for-profit, non-profit, or public sector.

WEX and PWO placements 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.

Services provided through PDX Metro Works are to be coordinated with the PDX Metro Works program staff. Please refer to the PDX Metro Works *Regional Program Standards* for additional detailed information, policy and procedures related to PDX Metro Works services.

The following steps are to be completed to begin a WEX or PWO service:

- The participant or 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 referral process must clearly indicate if the participant is being referred for a Work Experience (WEX) or a Paid Work Opportunity (PWO) placement.
- The Worksite Development Program Operator staff contacts the participant or referring Career Coach to discuss possible placement options (WEX or PWO) and assess if the participant is a good match for the program.
- For Work Experience placements only, the Career Coach submits a copy of the participant's career plan. This document is not required for a Paid Work Opportunity placement. A resume may also be required for matching to a WEX or PWO.
- The participant completes a screening with the Worksite Liaison. If the Liaison assesses that the participant should be considered for a different placement service than what is requested in the referral form, the recommendation is to be communicated to the participant's Career Coach.
- The participant must sign the *Participant Acknowledgement to Begin Work* form. ***<u>This document must be signed and dated before the participant starts a WEX or PWO.</u>***
- 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. ***<u>The hiring process must be completed before a participant can begin a WEX or PWO.</u>***

PDX Youth@Work

Youth Service

A Work Experience (WEX) is intended to prepare a participant for future, unsubsidized employment, by matching participants with worksites committed to providing supportive supervision and mentorship in positions aligning with a participant's short- or long-term career goals.

A Work Experience is a planned, structured short-term learning and training experience that takes place at a worksite and involves work that is defined by a written, signed *Work Experience Training Agreement* with the worksite. The *Work Experience Training Agreement* outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained.

A Work Experience must include academic and workplace skills as identified in the *Work Experience Training Agreement* and must include training on the information necessary to understand and work in specific industries and/or occupations. The 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 apply. 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. Refer to the PDX Youth@Work *Regional Program Standards* for the administrative rules for a Work Experience.

Payments

Training & Education Service Payments

Training & Education Service Payments include On-the-Job Training payments, tuition, fees, books and supplies for participants to engage in Training and education services. The participant must be enrolled in the I-Trac fund being used to pay for Training or education service payment.

Required Documentation
The detailed invoice from the Training or education service provider which is equal to or greater than the payment amount must be maintained in the financial files.

Support Services

Support Services are financial assistance to offset expenses necessary for a participant to engage in program activities or to seek or retain employment. Prior to considering Support Service payments, 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.

Processes must be in place at each Service Provider 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 WSPM program services.

Support services are considered payments and do not extend program participation; therefore, every support service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching). Support services may not be provided in Follow-Up.

Prerequisites

Participants who seek Support Services must be enrolled in the P10K program with a Participant Date.

Documentation of Support Service Need

The support must be necessary to enable the participant to engage in Training, job search activities or employment. Documentation of need may be competed through the following methods:

- Completion of a Prosperity Planner budget

  OR

- Customer Attestation through one of the following characteristics documented through a case note in I-Trac attached to the first Support Service payment:

- Homelessness
- Just released from incarceration within the past 90 days
- Receiving public assistance including TANF, SNAP, Medicaid/SCHIP/OHP, HUD Housing Choice Voucher (Section 8), Home Energy Assistance (LIHEAP, OEAP, or WAP), Free & Reduced-Price Lunch (School Nutrition Program), WIC Program
- Qualifies for a Tri-Met Low-Income Fare Hop Fast pass
- The total family income for the six months prior to the Support Service payment is not more than 70 percent of the Lower Living Standard Income Level (LLSIL). Refer to *Addendum B* above in these Regional Program Standards for additional information on income calculation.
- Unemployed

Administrative Requirements

Documentation

All Support Services are to be tracked in the participant's I-Trac record on the Payments Tab in the fund being used to make the payment. 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.

> ***Note:*** Direct deposit into an account in the participant's name and the endorsement on a cancelled check are both allowable documentation of this requirement. Direct deposit information must be received directly from the participant with approval to deposit Support Service payments into 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.

Fiscal Procedures

Each WSPM 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.

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

Each WSPM 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.

> ***Note:*** Support Service purchases administered with pre-purchased (gift) cards must be allowable under the Federal Cost Principles (unless specifically allowed for by a specific grant, which allowability will be outlined in the *Regional Program Standards* for the grant).

Support Service payments/reimbursement must be made from funds during the program year in which they were incurred.

Support Service Definitions

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***: Funds may not be used to pay for interest charges, late fees or payment or modification of a debt.

Books and Fees

Costs associated with required books, school supplies, test preparation materials, testing fees and fees required for participants enrolled and officially registered in Post-Secondary Education, Training, Workforce Preparation or ABE, ESL or GED classes.

> ***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.

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

Employment Documentation

Payment of fees required to replace documentation required to complete an I-9 with an employer to secure employment after enrollment in P10K.

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.

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.

Housing 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 work authorization 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***: Participant drug testing is not allowed except where required to participate in a Training, Apprenticeship program or to facilitate the hiring process for the participant.

> ***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/Scooter Purchase
When a participant chooses and it is determined that the purchase of a bicycle or a scooter is as, or more, cost effective then other types of transportation assistance, Support Service funds may be used to purchase a bicycle/scooter, 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 for reasonable costs. (https://communitycyclingcenter.org/)

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). An electric bike or scooter is allowed if the price is comparable to the price of a bike.

> ***Note:*** 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 (including Hop Cards), 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 signed receipt for each instance of a transportation payment can replace a log as long as the tie to services is noted.
- A participant's signature acknowledging receipt of bus passes, bus ticket packages (not individual tickets), and gas card distribution is required. Signature acknowledging receipt can be obtained on the transportation log or through email confirmation from the participant.
- 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.
- Receipts for the total amount of a gas card are required and must show allowable and approved purchases (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 or phone number (in the case of cell phones).

Required Documentation: Clear verification (copy of detailed utility invoice that matches participants address. Cell phone invoice that matches the participant's name or phone number in I-Trac) of charges due. Payment must be made to the vendor.

Stipend

Learning Opportunity Stipend

Youth Service

A Stipend is a sum of money paid to participants to help cover basic costs while they engage in a Learning Opportunity. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the Learning Opportunity. Every Stipend awarded must have a clear connection to a PDX Youth@Work I-Trac service. There must be clear goals and expectations set forth as to what the participant must do to earn a stipend, as documented in their Learning Opportunity Training Agreement. The business process for Learning Opportunities is posted on the Knowledge Base;

Administrative Rules

- Any participant receiving a Stipend must complete a W-9 form. Participants receiving more than $599 in Stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.
- 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. If none of these are possible for a participant in a Learning Opportunity, the participant can complete a reflection exercise (video or written report) after completion of the Learning Opportunity.
- 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 and Adobe Sign. Further Stipend payments to the pay card do not require additional signature.
- Stipend payment must be entered in I-Trac in the Stipend Control on the Payments tab if paid directly by the Service Provider.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

WSPM Cohort Training Stipend

Adult Service

A Stipend is a sum of money paid to participants to help cover basic costs while they engage in eligible Portland Metro cohort Training. 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. There must be clear goals and expectations set forth as to what the participant must do to earn a Stipend. Every Stipend awarded must have a clear connection to a specific participant goal as documented in their Cohort Training Application.

Cohort Training programs that include a Stipend will have business processes that comply with these *Regional Program Standards* requirements and outline and publish the Stipend payments available and the requirements for receiving the Stipend.

Administrative Rules

Service Providers must establish written procedures for paying Stipends to ensure proper and consistent application of this 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 may be used as the signed receipt (see additional details in Support Services – Administrative Requirements). 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 are to be entered into the I-Trac Stipend Payments control in the fund being used to pay the stipend.
- Any participant receiving a Stipend must complete a W-9 form. Participants receiving more than $599 in Stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.

Performance

Performance Element	Description	Performance and Reporting Cohort
Percentage of Participants served whose gender is woman	**Denominator** All enrolled participants whose gender identity is man or woman (sum total Man + Woman) **Numerator** Enrolled participants whose gender is woman	Quarter of Participation Date
Percentage of Participants successfully completing program	**Denominator** All Exited participants **Numerator** All participants with an Exit-Successful in I-Trac as defined below in Additional Performance Guidance	Quarter of Exit Date
Employment Rate	**Denominator** All Exited participants not employed at Registration **Numerator** Participants who obtain employment by Full Program Exit Date with an *After Participation Employment Confirmation* in I-Trac, or UI Employment record match	Quarter of Employment Confirmation Date
Participants who obtain employment and earn $17/hour or more	**Denominator** All Exited participants not employed at Registration who obtain employment and have an *After Participation Employment Confirmation* or UI record match. **Numerator** Participants who obtain employment by Full Program Exit Date with a wage rate of $17/hour or higher – all participants with *an After Participation Employment Confirmation* or UI record match in I-Trac where Hourly Pay is $17 or more per hour	Quarter of Employment Confirmation Date

Additional Performance and Data Guidance

Performance data is tracked and reported through I-Trac. Contractors should establish a process to regularly review I-Trac reports for data quality. Ensure that participants' engagement in services and employment attainment is being entered within the required timeframes and with appropriate confirmations (where required).

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, 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)
- Hourly Pay
- Hours worked per week
- Benefits

Employment Information 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 Benefits information is required to be entered.

add	Employment Information				
	Start Date	End Date	Employment Type	Employer	Industry (NAICS)
edit	10/11/2022		Unsubsidized Employment	Worksystems Inc.	Administrative and Support and Waste Management and Remediation Services

add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits
	10/11/2022	Administrative Services Managers	$15.00	20.00	No Benefits

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.

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 this measure. When participants Exit and Contractor staff learn they became employed, staff should attempt to contact the participant and obtain the employment details. Performance is captured between the participation and Exit Date. I-Trac documentation is acquired by entering an *After Participation Employment Confirmation.*

Enrolled Participant

A customer who has completed the P10K Eligibility and Registration process and has received one P10K funded service. For the service to count and trigger participation it must be data-entered into I-Trac.

Exit-Successful

Participants who complete a Training, Post-Secondary Education and Employment Skills service, a Work Based Training service, Career Coaching services or obtain employment. Exit-Successful type is manually entered in I-Trac.

Quality Job Standards

Worksystems is committed to advancing access to quality jobs for all participants served by the public workforce system to access careers with living wages, benefits and other job quality characteristics. In partnership with regional workforce boards in SW Washington and Clackamas County, Worksystems launched an initiative to develop and implement a community-based definition of a Quality Job that includes: 1) living wages; 2) worker engagement; 3) predictable hours; 4) comprehensive benefits; 5) accessible hiring and onboarding practices; and 6) training and advancement opportunities.

Using labor market data, Worksystems identified high-growth sectors and targeted occupations that align with our Quality Job definition in (1) advanced manufacturing; (2) clean energy; (3) construction; (4) early childhood education; and (5) healthcare and social assistance. These targeted occupations offer competitive starting wages, employer-sponsored benefits, and opportunities for advancement. Many targeted occupations do not require a degree, and value skills gained through training programs, On-the-Job Training, Registered Apprenticeships, military service and other lived experiences.

Career Coaching services are designed to assist participants in accessing quality job pathways to employment by educating them about Worksystems targeted sectors and targeted occupations. Ongoing guidance and training regarding Career Coaching with an emphasis on job quality and targeted occupations will be provided by Worksystems.

Contracted services focused on quality jobs include, (but aren't limited to):

- Help job seekers understand what makes a quality job—beyond just wages— and how to job search using the quality jobs framework.
- Help participants evaluate employment opportunities in Worksystems' targeted sectors and develop individualized plans that align with their unique career and education goals and circumstances.
- Help participants recognize when a job only meets some - or none - of the quality job characteristics, while explaining when a role is a useful first step toward a quality job.
- Identify and/or develop training and work experience opportunities that help participants develop essential skills as indicated by industry partners, including adaptability, communication, collaboration, analysis/solution mindset and self-awareness.

The Quality Jobs Framework is a tool to support personalized career planning. Career Coaches should use it to guide conversations about job quality and career goals. Not all job opportunities will meet every standard, but they may represent critical steps toward a quality career. Coaches play a key role in helping participants recognize quality jobs, set long-term goals, and continue progressing on their employment journey.

Quality Jobs Framework
Worksystems, in partnership with workforce boards in SW Washington and Clackamas County, launched an initiative to define what makes a *Quality Job* based on community input. The resulting framework highlights the following key standards:

- **Living Wages**
  Jobs that pay enough to meet basic needs, considering location and family size. Wages alone do not indicate Quality Jobs; other standards must be considered alongside.
- **Worker Engagement**
  Jobs that include worker voice through internal channels or union representation.
- **Predictable Hours**
  Jobs offering clear, reliable scheduling—whether part-time, full-time, flexible, seasonal, or with overtime options.
- **Comprehensive Benefits**
  Jobs with employer-supported benefits like healthcare, paid leave, and retirement plans, ideally with employer cost-sharing.
- **Accessible Hiring and Onboarding**
  Jobs that value diverse experiences, including military service, caregiving, apprenticeships, and on-the-job training.
- **Training and Advancement**
  Jobs with clear career pathways and/or access to structured learning such as apprenticeships.

Other Quality Job Indicators

- Labor Representation - Unionized jobs typically offer higher wages, better benefits, and stronger worker voice.
- B Corp Certification - Third-party verified companies meet high standards for worker well-being, transparency, and accountability.
- Benefit Corporation - Legally commit to purpose, accountability, and transparency—often a step toward B Corp certification.
- Employee Stock Option Program (ESOPS) - Employee-owned participants have larger retirement account balances than comparable workers nationwide and have better job security.
- Partners in Diversity - Employers aligned with this network show a commitment to equitable hiring.
- Apprenticeships – Employers who participate in Registered Apprenticeships Provide structured, paid training and career progression for job seekers.

I-Trac Data Entry and File Documentation

Performance Element	I-Trac Data Entry Fields	File Documentation
Percentage of Participants served whose gender is woman	**Provider Tab** • Edit Customer	Customer Attestation
Percentage of Participants successfully completing program	**Services Tab** • Services Control – Career Coaching service • Post-Secondary Education & Employment Skills Control or Work-Based Training Control • Service End Date • Status = "Completed" **Outcomes Tab** • Employment Information • Employment Confirmation Control • Confirmation type – After Participation Employment Confirmation • Program Status – Exit - Successful	Staff Attestation
Employment Rate	**Outcomes Tab** • Employment Information • Employment Confirmation Control • Confirmation type – After Participation Employment Confirmation • Program Status - Exited	Staff Attestation
Participants who obtain employment, percent that earn $17/hour or more	**Outcomes Tab** • Employment Information with a wage record of $17/hour or more • Employment Confirmation Control • Confirmation type – After Participation Employment Confirmation • Program Status – Exited from program	Staff Attestation