



## BOARD MEETING AGENDA

January 27, 2021 | 9:00 a.m. – 12:00 p.m. | Meeting No. 246

Click Link to Join Zoom Meeting

<https://zoom.us/j/99892451717?pwd=NEJwQlIXTIRWSUNySXI2TIBLc3AwQT09>

Meeting ID: 998 9245 1717 | Password: 780404

- 9:00 a.m.     **Call to Order**
- Welcome and Introductions
- 9:05 a.m.     **Chairs Report** 1
- **Consent Agenda (Action)**
    - Approval of November and December Meeting Minutes
    - Waiver Request
- 9:15 a.m.     **Inclusive, Equitable, Economic Recovery Campaign (Action)** 2
- Lisa Manzer, Center for Women's Welfare, University of Washington School of Social Work
  - Eric Wolf, Workforce Board
  - Eleni Papadakis, Workforce Board
- 11:30 a.m.   **Legislative Update**
- Nova Gattman, Workforce Board
- 12:00 p.m.   **Meeting Wrap-Up and Adjourn**

Tab 1



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**MINUTES OF MEETING NO. 244**  
**November 18, 2020**

**Board Members Present:**

Perry England, Chair  
Amy Anderson for Gary Chandler, Representing Business  
Chris Alejano, Representing Underserved Populations  
Larry Brown, Representing Labor  
Rick Anderson for Lisa Brown, Department of Commerce  
Marie Bruin for Jan Yoshiwara, State Board for Community and Technical Colleges (SBCTC)  
Mark Mattke, Representing Local Government  
Lee Anne Caylor, Representing Business  
Creigh H. Agnew, Representing Business  
Mark Martinez, Representing Labor  
Suzi LeVine, Employment Security Department (ESD)  
David Stillman for Cheryl Strange, Department of Social and Health Services (DSHS)

**Welcome and Introductions**

Mr. Perry England called the meeting to order at 9:00 a.m. on a virtual meeting using Zoom.

**Consent Agenda**

**Motion 2020-244-01** Ms. Creigh Agnew moved adoption of the consent agenda. Mr. Larry Brown seconded the motion which passed unanimously.

**State Coordinated Economic Recovery Plan**

Mr. Dan McConnon provided the Board with an update on the state coordinated economic recovery process and how the Board's work on their portion of the recovery plan fits into the larger effort. He updated the Board on the Washington Recovery Group (WRG). The purpose of the WRG is to establish and maintain unified recovery objectives and coordinate efforts not only at the state level but also across local government. Keeping equity and social justice at the core of its work the WRG focus areas of the plan are education and childcare, health and healthcare, community and social services, housing, support for small business, employment and jobs, infrastructure and energy. The Board discussed how to ensure that people in Washington don't

return to just a job but reenter the labor market post pandemic with improved opportunity in family wage careers.

### **Potential Priorities for Support and Advocacy: Discussion of Pre-Meeting Materials**

Ms. Eleni Papadakis provided a presentation on Accelerating Inclusive and Equitable Economic Recovery: Washington's Workforce Development Plan for Post-Pandemic Economic Recovery.

The Board was asked to identify one to three economic recovery strategies or initiatives to be the focus of their efforts over the next 12 to 18 months and use their identified priorities to fuel development of the Board's role as a collective impact leadership organization. Once the priority or priorities are identified, the Board will be able to charter their course using the five pillars of collective impact:

- Common agenda and shared vision and goals
- Shared measurement system
- Mutually reinforcing activities
- Continuous communication
- Recognized "backbone" organization

Staff identified two proposals for the Board to consider that they felt aligned well with and advance many of the recommendations in the plan. The proposals came from Board Members Ms. Jan Yoshiwara and Commissioner Suzi LeVine.

Mr. Arlan Harris presented an overview of SBCTC's legislative priorities, specifically developed to address economic recovery and equity issues.

Ms. Suzi LeVine presented the concept of an economic recovery "campaign" based on many of the recommendations in the Board's plan. The campaign would bring the resources and support of a wide range of partners and stakeholders together with a common agenda—to help thousands of displaced workers find high demand, livable-wage employment opportunities as the economy re-emerges and recovers.

### **Overview of Recommendations for "Next Generation" Workforce Board**

Ms. Nova Gattman and Mr. Eric Wolf presented the Next generation Workforce Board recommendations that came out of the Board's virtual retreat. The recommendations were:

- Create a temporary subcommittee of at least one business, labor, and government member charged with developing and socializing potential statutory changes for the Legislative Session in 2022
- Adopt and utilize a collective impact framework for the system
- Convene a task force to develop a "living" map
- Establish a Board Resource Acquisition Subcommittee
- Identify and establish collective metrics and data exchange mechanism



The Board and audience members then entered facilitated breakouts to discuss all they had heard.

The Board came back together to report out on their small group discussions. Board staff will take the items identified and look for themes to bring back to the Board at their next meeting December 18.

The meeting adjourned at 1:00 p.m.




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**MINUTES OF MEETING NO. 245**  
**December 18, 2020**

**Board Members Present:**

Perry England, Chair  
 Chris Alejano, Representing Underserved Populations  
 Larry Brown, Representing Labor  
 Marie Bruin for Jan Yoshiwara, State Board for Community and Technical Colleges (SBCTC)  
 Mark Mattke, Representing Local Government  
 Lee Anne Caylor, Representing Business  
 Creigh H. Agnew, Representing Business  
 Mark Martinez, Representing Labor  
 Suzi LeVine, Employment Security Department (ESD)  
 David Stillman for Cheryl Strange, Department of Social and Health Services (DSHS)

**Welcome and Introductions**

Mr. Perry England called the meeting to order at 1:00 p.m. on a virtual meeting using Zoom.

**Supporting an Inclusive, Equitable Workforce Economic Recovery Campaign**

At the November 18 Board meeting, the Board was briefed on two proposals that align well with, and advance many of, the recommendations in the Board's economic recovery plan. Jan Yoshiwara presented an overview of SBCTC's legislative priorities, specifically developed to address economic recovery and equity issues; and Suzi LeVine presented the concept of an economic recovery "campaign" based on many of the recommendations in the Board's plan. The campaign would bring the resources and support of a wide range of partners and stakeholders together with a common agenda—to help thousands of displaced workers find high-demand, family-sustaining employment opportunities as the economy re-emerges and recovers. Using the five pillars of collective impact as an organizing framework, Board members and participants identified critical characteristics of a potential collective impact agreement or campaign.

Mr. Eric Wolf and Ms. Nova Gattman provided the Board with a presentation that synthesized the information gathered at the November 18 Board meeting, and their staff attempt at drafting a collective impact vision discussion piece for the Workforce Board.

The Board discussed a future request of the Governor to endorse their role in an inclusive, equitable economic recovery system and as a collective impact organization and development of a public-private partnership campaign to support the state's inclusive, equitable economic recovery.

Mr. John Aultman provided the Board with an update on Governor Inslee's budget proposals.

The Board discussed an initiative concept and tagline proposed by staff: 250 by '25" – Moving all Washingtonians to earn above 250% of the Federal Poverty Level by 2025 (generally at least \$15/hr). The Board was in total agreement on the goal to create an inclusive economic recovery and ecosystem for all Washingtonians, creating an opportunity for sustainable family-wage jobs and careers in all communities. However, they did not feel that 250% above FPL was a strong enough goal given how long it has been since the FPL has been updated and the higher-than-average cost of living in Washington. The Board engaged in an active discussion about the pros and cons of defining sustainable income with a set number such as \$15/hr. They coalesced around exploring use of the self-sufficiency calculator as a baseline to measure and track progress against. Staff was asked to bring some additional options for initiative taglines back to them at the next board meeting.

After discussing the various methods of Governor sponsorship available to them the Board agreed to ask the Governor to issue an executive order solidifying the Board's leadership role within the broad workforce development system and to establish a common vision and set of priorities across cabinet agencies and other partners. The Board directed staff to work with stakeholders from both executive agencies and workforce system partners to develop a draft Executive Order for the Board's consideration at the January meeting.

The meeting adjourned at 3:00 p.m.

# Waiver Request for LWDB to Directly Provide One-Stop Operator Services (Workforce Central – Tacoma/Pierce)

PRESENTERS: Eric Wolf

BOARD MEETING DATE: 1/27/21

DISCUSSION TIME NEEDED: Consent Agenda Item – Discussion as Necessary

<p><b>ISSUE/SITUATION:</b> Be concise - 1 or 2 sentences that get to the heart of the situation, problem or opportunity being addressed</p>	<p>Workforce Central, the local workforce development board serving Tacoma and Pierce County, is petitioning the Board for waiver authority under Workforce Policy 5404 to directly hire a one-stop operator. This follows an unsuccessful public procurement process earlier this year. This request is supported by all partners in the delivery of local WorkSource services, as evidenced by the interviews on the pre-meeting video. (<a href="https://youtu.be/RWYuuCnL7b0">https://youtu.be/RWYuuCnL7b0</a>).</p> <p>There are also letters of support from the two Chief Local Elected Officials (CLEOs) in the request packet.</p>
<p><b>BACKGROUND:</b> Short history of how this recommendation came to be. What has been tried, to what result? What evidence exists to support this recommendation?</p>	<p><b><u>Workforce System Policy 5404 and the Board’s Role in Granting Flexibility</u></b></p> <p>Workforce System Policy 5404 sets out guidance on procurement and selection of both one-stop operators and providers of services at the local level. Developed and considered by the Board in 2016 in the wake of WIOA reauthorization, 5404 sets the general expectation that Local Workforce Development Boards (LWDBs) conduct open and competitive procurement processes to identify appropriate providers of one-stop operator and other services. 5404 requires</p> <p>“One-stop Operators” are not providers of training services to adults, youth, or dislocated workers. They often coordinate and supervise the business functions of keeping the one-stop’s doors open, and frequently serve a cross-agency and cross-partner facilitation role. Under WIOA, one-stop operators generally must be designated and certified through a competitive procurement process. LWDBs must be able to document, in writing, that they made their board members and the public aware of the competitive process to be used. That includes providing at least 30-day public notice through media where prospective local, state, and national bidders typically identify such opportunities (e.g., local print newspapers, on-line newspapers, LWDB web sites, other community web sites, etc.). Solicitations must include the selection criteria to be used in the process and must be maintained as part of the documentation. The competitive process used by LWDBs to procure one-stop operators must be conducted at least once every four years and follow the principles of competitive procurement outlined in federal guidance.</p> <p>In some cases, the law and regulations allows local boards to use “sole source” procurement, essentially bypassing a competitive process and allowing for a single bidder, in some cases the LWDB itself. LWDBs must be able to demonstrate that they conducted sufficient research and outreach to justify using sole source procurement. LWDBs must also document that the solicitation was publicized in a manner providing for full and open competition.</p> <p>LWDBs may be selected as one-stop operators under a sole source agreement only if they demonstrate adherence to appropriate internal controls and establish conflict of interest policies and procedures that identify appropriate internal controls. LWDBs</p>

	<p>must complete Attachment A of 5404 (Request for Waiver to Serve as a One-Stop Operator) and submit it to the State Workforce Development Board (SWDB), wherein the LWDB lays out their justification for seeking the waiver, lays out internal controls, and demonstrates that their chief local elected official has been consulted on and approved the development of the waiver.</p> <p>In Q4 2020, Workforce Central underwent a competitive procurement for a new one-stop operator, reaching out to local potential bidders, hosting a bidder's conference, and publishing notice through multiple media outlets in October 2020. The LWDB convened a nine-member panel of non-Board members drawn from different agency partners across the workforce system. Three bids were received, however the bid panel was unsatisfied with the quality of all three bids, and identified a specific concern that the bidders lacked knowledge or experience of local workforce systems to the extent that they would be able to fulfil the RFP's requirements. As a result, the bid evaluation committee elected not to recommend contracting with any of the three bidders and instead recommended that the local area explore waiver authority under Policy 5404 to directly hire a one-stop operator to the Workforce Central staff, essentially a sole source procurement.</p> <p>Workforce Central's staff has completed Attachment A of 5404, included in your Board packet, addresses the background above in greater detail. In the narrative of the application, they address:</p> <ol style="list-style-type: none"> <li>1. Why the LWDB did not find qualified bidders during the review process;</li> <li>2. The LWDB's qualifications are to be a one-stop operator; and</li> <li>3. How the LWDB will balance its role as strategic coordinator of the local one-stop system with the role of one-stop operator.</li> </ol> <p><b><u>Meeting Materials</u></b></p> <p>In your packet for this meeting you will find:</p> <ol style="list-style-type: none"> <li>1. Workforce Central's waiver application to the Board; and</li> <li>2. The required supporting letters from their two chief local elected officials, County Executive Bruce Dammeier and Tacoma Mayor Victoria Woodards.</li> </ol> <p>Additionally, Workforce Central Chief Executive Officer Katie Condit has prepared a pre-meeting briefing video with additional information on their local procurement process and will be available for additional questions at the meeting if needed.</p>
<p><b>RECOMMENDATION AND NEXT STEPS:</b> What specific result do you want from the Board? Is this recommendation for</p>	<p>Workforce Central has properly submitted a waiver request under Attachment A of Policy 5404, and staff has interviewed the local area CEO and monitoring director on their local procurement process. Workforce Central underwent a compliant procurement process which staff has established yielded no local providers who adequately addressed the local area's procurement priorities. The local area has</p>

discussion or action? If for discussion, will action be required at a later date? What next steps are expected after this discussion?	included in their attachment their local conflict of interest policies and internal controls policies, and demonstrated that both local area CLEOs have reviewed and approved the request of the Board.  Staff recommends that the Board approve Workforce Central's waiver request pursuant to Workforce System Policy 5404.
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## Request for Waiver to Serve as a One-Stop Operator

Date: 12/18/2020

LWDB: WorkForce Central- Pierce County

Contact Person/Title: Katie Condit, CEO

Phone: 253-495-8515

E-mail Address: [kcondit@workforce-central.org](mailto:kcondit@workforce-central.org)

Mailing Address: 3640 South Cedar Street, Suite E | Tacoma, WA 98409 |

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Please indicate the one-stop site(s) for which the LWDB is requesting a waiver to serve as the one-stop operator:

1. WorkSource Pierce: 2121 S State St #300, Tacoma, WA 98405

The LWDB must provide the following information for each site for which it is requesting a waiver to serve as the one-stop operator:

1. Provide written documentation of the entire process for making a sole-source selection consistent with Section 3.c.i.C.3\* of WIOA Title I Policy 5404, Revision 1, including why the LWDB was unable to secure any one-stop operator bids in response to its solicitation or did not find qualified bidders during the review process, what the LWDB's qualifications are to be a one-stop operator, and how the LWDB will balance its role as strategic coordinator of the local one-stop system with the role of one-stop operator.

Beginning in September 2020, WorkForce Central and representatives from nine organizations in the WorkSource system in Pierce County began a robust process to seek potential providers for One-Stop Operator services in the region. To date, the OSO role has been filled by an independent contractor working part-time from Washington DC on behalf of the Pierce County workforce development system. Upon evaluating the current structure, the 16 MOU partner organizations in the system proposed shifting the OSO model to combine it with the part-time Center Manager responsibilities and create a full-time, local role to support local systems and streamline costs. The current OSO Contract ends December 31<sup>st</sup>.

The process that led the LWDB and the systems partners to recommend requesting a waiver for WorkForce Central to serve as One-Stop Operator was thorough. An independent panel of stakeholders from nine organization partners in the local workforce system designed and published a Request for Proposals detailing the expectations and needs required for a qualified bidder. The qualifications included

experience facilitating workforce systems and partnerships, understanding and experience with WorkSource system and WIOA regulations, knowledge of and connection with the local Pierce County region, ability to incorporate local control and partner oversight of OSO and workforce system within current organization structure, and ability to perform OSO role with a full-time, local presence.

The RFP for the WorkSource Pierce OSO was published through multiple media outlets, constant contact email distribution list and targeted outreach, for 5 weeks from October 15th to November 20, 2020. A bidder's conference was held virtually during that time period for interested applicants. The search resulted in three bidders. After a thorough review process and an additional round of oral presentations, concerns arose about applicant's decision making and governance structures that did not allow for the flexible level of partnership oversight and local control required as a qualification for the OSO. In addition, the applicant that scored the highest in the process, still at an undesirable score of 74%, lacked knowledge and experience with local workforce systems to the extent that the evaluation committee had strong concerns about their ability to meet the requirements for a qualified bidder laid out in the RFP.

During their 12/15/20 meeting, the Evaluation Committee agreed they were not comfortable awarding an OSO contract to an entity they felt did not adequately meet the needs of the WorkSource Pierce region. An alternate approach to OSO contracting in which WorkForce Central could potentially serve as the OSO via sole source procurement was discussed. Due to WorkForce Central's demonstrated knowledge of the local area's needs, the strong partnership developed between WorkForce Central and the WorkSource Pierce partnership, and the fact the OSO would report to the WorkSource Partnership (while having a WorkForce Central staff as a functional supervisor), the Committee unanimously agreed it would be in the best interest of Pierce County Workforce Development Board for WorkForce Central to act as the region's OSO. The Pierce County Workforce Development Council and Executive Board of CLEOs enthusiastically voted in support of this recommendation. In this case, we request the Federal awarding agency or pass-through entity expressly authorize non-competitive proposals in response to a written request from WorkForce Central.

The Pierce County Workforce Development Council and local workforce systems partners have designed the OSO role to be an integral role in strategically coordinating the local one-stop system. Because this is already the core charge of Pierce County WDC, it aligns strongly with current responsibilities WorkForce Central is leading on behalf of the partnership. On behalf of the partnership, WorkForce Central has staffed the One Stop Center Manager role for three years through successful growth and development of a new, comprehensive one-stop center. This dual role did not interfere or clash with the role of the LWDB, but strengthened the systems alignment possibilities, allowing for additional partners to formally enter the WorkSource Pierce system. Given the OSO will be an integrated role moving forward, WorkForce Central is fully confident in our ability to not only balance the roles, but to integrate our role as a strategic coordinator and operating the one-stop. We have established a structure that ensures oversight of the OSO position by the systems partnership, so accountability to the system will remain constant. We're grateful for the Board's consideration of this waiver.



2. Provide copies of the local policies and procedures that describe the internal controls, firewalls, and conflict of interest mitigation the LWDB will impose upon itself as the operator of the one-stop site.

Attached Below

3. Attach documentation (signed and dated letter) that the local Chief Elected Official reviewed the information prepared for the waiver request (items 1 and 2 above) and approved the waiver request.

Attached Below

Submit the completed waiver request and documentation to:

Workforce Training and Education Coordinating Board  
P.O. Box 43105  
Olympia, WA 98504-3105  
[Workforce@wtb.wa.gov](mailto:Workforce@wtb.wa.gov)



## **WorkSource Pierce One-Stop System Operator (OSSO) Conflict of Interest Policy**

**Policy Number:** 3011

**Effective Date:** 12-21-20

**Supersedes:** N/A

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### **PURPOSE:**

The Pierce County Workforce Development Council (WDC) and WorkForce Central are committed to maintaining the highest of standards of ethical conduct and to guard against problems arising from real, perceived, or potential conflict of interest. This policy communicates protections against potential conflicts of interest as it pertains to the WorkSource Pierce One-Stop System Operator (OSSO) employed by WorkForce Central.

### **BACKGROUND**

As specified in 20 CFR 679.430, TEGL 15-16, and ESD Policy 5404, Local Workforce Development Boards (LWDBs) may be selected as one-stop operators under a sole source agreement only if they demonstrate adherence to appropriate internal controls and establish conflict of interest policies and procedures that identify appropriate internal controls and are approved by the Governor. A conflict of interest policy is required to ensure that individuals or representatives of organizations entrusted with public funds will not personally or professionally benefit from the award, administration, or expenditure of such funds.

### **POLICY**

WorkForce Central and the WorkSource Pierce OSSO demonstrate compliance with WIOA CFR 20 679.430 as outlined below in the delegation and separation of duties to ensure there is no conflict of interest:

- One Stop Operators must disclose any potential conflicts of interest arising from relationships with training providers and other service providers.
- No individual in a decision-making capacity may engage in any activity if a conflict of interest (real, implied, apparent, or potential) is involved. This includes decisions involving the selection, award, or administration of a subgrant or contract supported by WIOA funds.
- LWDB officers, employees, or agents of the agencies and members of the LWDB standing committee making awards cannot solicit or accept gratuities, favors, or anything of monetary value from awardees, potential awardees, or other parties to agreements.
- Disciplinary actions may be taken up to and including termination of employment of the WorkSource Pierce OSSO and/or termination of WorkForce Central's role as the OSSO if either are found to be violation of this policy. The Pierce County WDC may evaluate any violations of these provisions on a case-by-case basis and recommend to the Executive Board, if and what penalties, sanctions or other disciplinary actions are appropriate.



## **ONE-STOP SYSTEM OPERATOR RESPONSIBILITIES**

The WorkSource Pierce OSSO will utilize strategic, operational, and exceptional customer service skills to collaborate with WorkForce Central, the Pierce County WDC, and WIOA and non-WIOA system partners to achieve the Pierce County WDC's objectives for the system in alignment with the local vision, mission, and core values. The OSSO will report directly to WorkForce Central Leadership and maintain regular coordination and communication with WorkForce Central. The OSSO will also be accountable to all WorkSource Pierce One-Stop System partners, while maintaining strict neutrality and impartiality. The OSSO role and responsibilities are described below:

1. Interact with all WIOA and non-WIOA partners in the design, implementation, and oversight of a fully integrated service delivery system. This design must include information sharing, cross agency training/professional development, common referral system, workforce skill standards (common set of "work readiness") competencies, common technology including an integrated platform as agreed to by system partners. Partner with WorkForce Central on common data collection systems.
2. Equally represent all the partners in the WorkSource Pierce One-Stop System and be responsible for promoting and living the vision, mission, and goals of the Pierce County WorkForce Development Council.
3. In partnership with WorkForce Central leadership, form, expand, and coordinate regional committees to address the needs affecting the Pierce WorkSource One-Stop System. Committees might be internally facing (e.g., staff development, hospitality, integrated service delivery) or customer facing (e.g. marketing, accessibility, safety, continuous improvement, and aesthetics).
4. In partnership with WorkForce Central leadership and the system Leadership team, the OSSO will co-design, negotiate and maintain an Infrastructure Sharing Agreement (IFA) as necessary to ensure partners contribute their share WorkSource Pierce One-Stop System costs, and will ensure that all shared costs are transparent to all partners. This includes researching and staying current with best-practices and equitable methodology for designing agreements.
5. Ensure WorkSource Pierce One-Stop System partners continue to align through the lens of integrated services, facilitate processes that leverage, connect, and integrate services across partners in the system.
6. Understand and comply with WIOA, local, state, federal laws, policies, regulations, and guidance.
7. Provide training and technical assistance in the development, implementation, and oversight of WorkSource Pierce One-Stop System standards/procedures/protocol to ensure exceptional customer experience for jobseekers, workers, and businesses are met throughout the system.
8. Uses strong customer-centric abilities to ensure that the look and feel of the WorkSource Pierce comprehensive center, partner affiliate sites and connection sites are welcoming and accessible. Serve as intermediary point of contact for partner facilities and shared assets.
9. Coordinate and facilitate operational conversations among partners to ensure a customer-centric and robust services delivery system. Be proactive in addressing partnership and system needs/issues.
10. Ensure all Americans with Disabilities Act requirements are met and managed as required by WIOA.
11. Create and provide reports to WorkForce Central, Executive Board, Pierce County WDC, WorkSource Pierce system partners and other stakeholders as appropriate.
12. Promote the services of the WorkSource Pierce One-Stop System center and sites, including development of marketing and outreach materials and management of the center social media with the support of WorkForce Central and Leadership team.



13. Oversee day-to-day operations of the WorkSource Pierce One-Stop System comprehensive center, including scheduling staffing patterns for greeting and facilitation, coordinating room reservations for the center and community partners (job fairs, large hiring events, community meetings, tours of visitors and dignitaries) and other center-based staffing responsibilities.
14. Conduct root cause analysis and engage with team members to provide day-to-day feedback regarding customer engagement. May provide functional oversight or guidance to partner staff within this realm.
15. Facilitate Equal Opportunity monitoring, hosting monitors, and responding to monitoring reports and ensures satisfactory results from monitoring visits for compliance.
16. Participate in ensuring policies are current, reviewed yearly, and remains in compliance with federal, state, and local policies.
17. Provide functional leadership to the WorkSource Pierce One-Stop System comprehensive center front-line staff in the areas of customer engagement, universal service access within the resource room, customer service delivery, and contract compliance as outlined within the Memorandum of Understanding (MOU).
18. Responsible for training all WorkSource Pierce One-Stop System comprehensive center staff on the essential functions of the center, resource room service delivery, shared standards outlined within the WorkSource handbook, center policies, top quality customer service expectations, and new employee orientation activities.
19. Ensure technology is functional and current and that equipment is maintained and appropriately secured.
20. Oversee the WorkSource Pierce One-Stop System comprehensive center calendar to ensure all classes and activities are adequately staffed and offered appropriately.
21. Maintain WorkSource Pierce One-Stop System comprehensive center hours, opening and closing, posting notices, and providing community flexibility for WorkSource hours and services as applicable and necessary for connection and affiliate work and service delivery.
22. Provide and/or assist in training WorkSource Pierce One-Stop System comprehensive center staff to ensure compliance with policies, procedures, and practices. Assist in coordinating WorkSource Pierce One-Stop System comprehensive center all staff meetings.
23. May assist in routine functional supervision of WorkSource Pierce One-Stop System comprehensive center staff and maintain availability of office equipment and other supplies to guests and staff.
24. May facilitate resolution of routine or occasional janitorial, parking, building security and safety matters when related to universal access and resources.
25. Conduct performance analyses to identify performance improvement opportunities for the WorkSource Pierce One-Stop System and ensure lean operating processes that result in compliance with policies and customer service delivery expectations.
26. Participate with WorkSource Pierce One-Stop System partners in Continuous Quality Improvement (CQI) surveying, data collection and analysis to improve system and services.

Per WIOA and associated guidance, the OSSO may not perform the following:

1. Develop, manage, or conduct the competitive procurement of service providers in which it intends to compete.
2. Convene system stakeholders to assist in the development of the local plan.
3. Prepare and submit local plans (as required under sec. 107 of WIOA).



4. Develop, manage, or participate, other than as a respondent, in the competitive selection process for One-Stop System Operators.
5. Select or terminate One-Stop System Operators or WIOA Title I service providers.
6. Perform monitoring or evaluation functions of itself or any WIOA partners.
7. Negotiate local performance accountability measures.
8. Develop and/or submit a budget for activities of the Pierce County WDC.
9. Establish practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term career and training services.

#### **REFERENCES:**

- Public Law 113-128 Section 121(d) (4) - *One-Stop Operators*
- 20 CFR 679.410(a)(3) and (c) - *Local board must avoid inherent conflict of interest*
- 20 CFR 679.430 - *Entities performing multiple functions*
- 20 CFR 683.200(c)(5) - *Administrative Rules, Costs, Limitations – Title I WIOA and Wagner-Peyser*
- 29 CFR 97.36(3)-*Procurement*
- 2 CFR Part 200 and Part 2900 - *Office of Management and Budget Uniform Guidance on administrative, cost, and audit provisions for federal grants*
- 2 CFR 200.318-*General procurement standards*
- RCW 42.52.160 – *Use of persons, money or property for private gain*
- TEGL 15-16- *Competitive Selection of One-Stop Operators*
- ESD WIOA Policy #5405, Rev. 1 – *Conflict of Interest*
- ESD WIOA Policy #5404, Rev. 1 – *Procurement and Selection of One-Stop Operators and Service Providers*

#### **ATTACHMENT**

WorkSource Pierce One-Stop System Operator Conflict of Interest Disclosure Form

#### **Approved:**

Katie Condit

Katie Condit (Dec 21, 2020 09:44 PST)

Katie Condit, WFC CEO

Dec 21, 2020

Date

#### **EQUAL OPPORTUNITY – EQUAL ACCESS**

WorkForce Central is an equal opportunity employer/program. Auxiliary aids and services are available upon request for individuals with disabilities. Washington Relay Service – 711.



## WorkSource Pierce One-Stop System Operator Conflict of Interest Disclosure Statement

Per the Workforce Innovation and Opportunity Act (WIOA), and TEGL 15-16, it is required that any real or potential conflicts of interest associated with the WorkSource Pierce One-Stop System Operator (OSSO) be disclosed. This form provides space for disclosures to be documented. Once completed, this form will be posted to the WorkForce Central website to ensure public disclosure guidelines in TEGL 15-16 are met.

### 1. Disclosure

A. Name of individual serving as the WorkSource Pierce One-Stop System Operator:

B. Name of employer: **WorkForce Central**

C. Employment capacity (check all that apply):

☐ Employed by agency involved with delivering WIOA services (Service Provider)

☐ Employed by WIOA training provider (instruction or higher education)

☐ Employed by Pierce County Workforce Development Council board member organization

☒ Employed by the Pierce County Workforce Development Council/local workforce board (WorkForce Central)

D. Per federal law, it is required that the WorkSource Pierce OSSO disclose any potential conflicts of interest arising from the relationship between OSSO and its employment with WorkForce Central, training service providers (those agencies directly delivering the training, such as colleges and other training providers), or other service providers, including but not limited to career service providers. If any boxes above are checked, please explain how the real or potential conflicts of interest are mitigated and how you have worked with the Pierce County Workforce Development Council and WorkForce Central to ensure sufficient firewalls exist.

-enter text here-

By signing this disclosure, I hereby confirm that:

1. I received a copy of the WFC WorkSource Pierce One-Stop System Operator Conflict of Interest Policy and TEGL 15-16,
2. I have read and understand the WFC WorkSource Pierce One-Stop System Operator Conflict of Interest Policy and TEGL 15-16,
3. I agree to comply with the WFC WorkSource Pierce One-Stop System Operator Conflict of Interest Policy and TEGL 15-16,
4. My responses to the above questions are complete and accurate to the best of my information and belief; and
5. If I become aware of any information that might indicate that this disclosure is inaccurate or that I have not complied with WFC WorkSource Pierce One-Stop System Operator Conflict of Interest Policy and TEGL 15-16, I will immediately notify an officer of the Pierce County Workforce Development Council.

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Signature, WS Pierce One-Stop System Operator

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Printed Name

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Date





## GREATER ECONOMIC VITALITY FOR ALL.

Partnering to prepare and grow the Pierce County workforce to align it with employer needs.

December 18, 2020

To the Washington Workforce Training and Education Coordinating Board,

Please accept this letter as our formal testament to having reviewed and approved the Pierce County Workforce Development Board's request for a waiver to serve as the Pierce County One-Stop Operator. As documented in the Waiver Request form, the Workforce Development Board, in partnership with WorkForce Central staff and a panel of nine organizational leaders from the Pierce County WorkSource System implemented a robust search process for our new One-Stop Operator. This process included the publication of an accessible and intentional RFP to secure prospective local, state, and national bidders, a virtual Bidders Conference, and a final pool of three applicants with two succeeding to the final round of oral presentations. The LWDB and panel of nine organization partners reviewing the applicants did not find qualified bidders during the review process who would meet the needs for the role as laid out in the waiver request.

Given that the robust panel of impartial reviewers formed from nine partner organizations within the WorkSource Pierce system determined competition to be inadequate and not in line with meeting local requirements for the OSSO, the Chief Local Elected Officials approve this request for a waiver. We are familiar with the details of the information prepared for this waiver and agree that the strongest direction forward is to allow WorkForce Central, governed by the workforce development board and in alignment with the local workforce system partnership, to serve as the WorkSource Pierce One-Stop Operator.

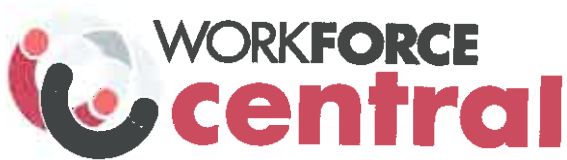
Thank you for your consideration,

A handwritten signature in blue ink that reads "Victoria Woodards".

Victoria Woodards  
Mayor  
City of Tacoma







**GREATER ECONOMIC VITALITY FOR ALL.**  
Partnering to prepare and grow the Pierce County workforce to align it with employer needs.

January 7, 2021

To the Washington Workforce Training and Education Coordinating Board,

Please accept this letter as our formal testament to having reviewed and approved the Pierce County Workforce Development Board's request for a waiver to serve as the Pierce County One-Stop Operator. As documented in the Waiver Request form, the Workforce Development Board, in partnership with WorkForce Central staff and a panel of nine organizational leaders from the Pierce County WorkSource System implemented a robust search process for our new One-Stop Operator. This process included the publication of an accessible and intentional RFP to secure prospective local, state, and national bidders, a virtual Bidders Conference, and a final pool of four applicants with two succeeding to the final round of oral presentations. The LWDB and panel of nine organization partners reviewing the applicants did not find qualified bidders during the review process who would meet the needs for the role as laid out in the waiver request.

Given that the robust panel of impartial reviewers formed from nine partner organizations within the WorkSource Pierce system determined competition to be inadequate and not in line with meeting local requirements for the OSSO, the Chief Local Elected Officials approve this request for a waiver. We are familiar with the details of the information prepared for this waiver and agree that the strongest direction forward is to allow WorkForce Central, governed by the workforce development board and in alignment with the local workforce system partnership, to serve as the WorkSource Pierce One-Stop Operator.

Thank you for your consideration,

A handwritten signature in blue ink, appearing to read "B. Dammeier", with a long horizontal flourish extending to the right.

Bruce F. Dammeier  
Pierce County Executive



# Tab 2

# Supporting an Inclusive, Equitable Workforce Economic Recovery Campaign – Refining the Draft Executive Order

PRESENTERS:

BOARD MEETING DATE: 1/27/21

DISCUSSION TIME NEEDED: 2.5 hours

<p><b>ISSUE/SITUATION:</b> Be concise - 1 or 2 sentences that get to the heart of the situation, problem or opportunity being addressed</p>	<p>The Board will work together to finalize their vision for a collective impact initiative towards inclusive, equitable economic recovery. They will learn about and make a determination on whether the Self Sufficiency Calculator can be used as the basis for the performance accountability framework.</p> <p>At the December 2020 meeting, the Board decided that executive sponsorship from Gov. Inslee was critical to the success of a broad, multi-agency, multi-stakeholder initiative of this magnitude. They directed staff to work with agency partners to develop a draft executive order, the issuance of which could be formally requested of the Governor. The Board will discuss that draft, and clarify the roles and contributions of partner organizations that they would like to be reflected in an executive order.</p>
<p><b>BACKGROUND:</b> Short history of how this recommendation came to be. What has been tried, to what result? What evidence exists to support this recommendation?</p>	<p>Our public systems do not have sufficient resources within current structures to drive equitable and inclusive economic recovery across the state. The Board can convene partners and help to mobilize resources—across program and funding silos, that can leverage new resources to achieve much greater impact for Washington’s workers, businesses and communities. While the world is fighting the pandemic and is steeped in the issues of the “here and now”, the Board’s unique role and tri-partite structure can help inspire and advance a vision for Washington’s prosperous future, a future in which all Washingtonians can share equitably.</p> <p>At the December Board meeting, staff presented a short overview of the synthesis document from the November 18 Mural exercise where partners identified key aspects of a potential collective impact campaign, and then facilitated a discussion around framing the campaign around a poverty-reduction goal. Members of the Board suggested that setting a static threshold above the federal poverty line as a goal for all Washington communities was not likely feasible, as very disparate living costs in different areas of the state make it difficult to create one meaningful, universal goal. Instead, members suggested staff investigate the feasibility of using the Self-Sufficiency Standard and Calculator Tool codeveloped by the University of Washington and the Seattle-King County WDC and updated every three years.</p> <p>Additionally, the Board directed staff to work with cross-agency leads and other key workforce system stakeholders to develop a draft Executive Order for the Board to consider transmitting to the Governor’s Office that would empower all partners to move forward on a collective impact initiative focused on equitable economic recovery. Board staff developed and sought feedback on Whereas clauses within the draft Executive Order in this Board packet, and worked with both the executive agency leads and the representatives of non-agency stakeholders to begin developing ideas of how each party might craft a “therefore” clause that recognizes their contributions to the collective impact initiative. At the January 27 Board meeting, members will receive an overview of the Draft Executive Order including all feedback received from partners and engaged in a facilitated discussion to continue</p>

	<p>refining the Whereas and Therefore clauses in the order with an eye to finalizing and transmitting the draft to the Governor’s Office for their review.</p> <p><b><u>Self-Sufficiency Calculator Standards</u></b></p> <p>The Self-Sufficiency Standard defines the income working families need to meet their basic necessities without private or public assistance. Basic minimum needs include: housing, child care, food, transportation, health care, miscellaneous expenses (clothing, telephone, household items), and taxes (minus federal and state tax credits). The Standard is calculated for 719 different family types (originally 70) for each county or area in a state. In the case of large counties in Washington, the Standard is calculated by subregions, proving a more granular snapshot of the living costs associated with south King County as opposed to the King County eastside, for example. The family types for which a Standard is calculated range from one adult with no children, to one adult with one infant, one adult with one preschooler, and so forth, up to two-adult families with six teenagers.</p> <p>Your Board packet contains three one-pager briefs on features of the Self-Sufficiency Standard and Calculator tool for your background information:</p> <ol style="list-style-type: none"> <li>1. The Self-Sufficiency Standard: Frequently Asked Questions and Answers;</li> <li>2. The Self-Sufficiency Standard: What a Difference a Measure Makes (addresses where the Standard has been adopted and how it has been applied in policymaking contexts); and</li> <li>3. What is the Self-Sufficiency Standard (a breakdown of the basic needs quantified by the Standard, and how it differs from measuring the federal poverty rate).</li> </ol> <p>Lisa Manzer of the UW Center of Women’s Welfare, the director of the Self-Sufficiency project, has been invited to give an overview of the Self-Sufficiency Standard for the Board’s background and to answer any questions.</p> <p>Also included in your packet for review is an “Equitable Recovery Framework” developed by the state’s Poverty Reduction Workgroup and introduced in their May 2020 report. The Poverty Reduction Workgroup’s Equitable Recovery Framework is included as a recent example of a similar initiative proposing a policymaking environment directly tied to achieving equitable economic recovery for all.</p>
<p><b>RECOMMENDATION AND NEXT STEPS:</b> What specific result do you want from the Board? Is this recommendation for discussion or action?</p>	<p>The Board will discuss the draft Executive Order prepared by staff and refine the Whereas and Therefore clauses before finalizing and submitting the draft Order to the Governor’s Office for consideration.</p>

<p>If for discussion, will action be required at a later date? What next steps are expected after this discussion?</p>	
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## **DRAFT EXECUTIVE ORDER**

WHEREAS, the economic impact resulting from the coronavirus pandemic is unprecedented in its scope and scale, touching every community across Washington;

WHEREAS, many of Washington's communities and populations had not benefitted from Washington's pre-pandemic economy, which had seen continual growth above the national average for several years;

WHEREAS, Washington's pre-pandemic economy generated tremendous income gains for most Washingtonians, raising the state's median family income from \$65,372 to \$78,687 over 2010-19,<sup>1</sup> yet the median income of the state's BIPOC populations remained stagnant;

WHEREAS, almost every industry sector has seen businesses decline or even shutter their doors, with statewide business income falling by \$4.6 billion, or 8 percent, over the last 12 months;

WHEREAS, the jobs of over 1 million Washingtonians have been adversely affected over the course of the pandemic, with almost 300,000 people still collecting unemployment insurance at the start of 2021;

WHEREAS, the hardest hit industries, hospitality, travel, retail, and services, also comprised much of the state's low-wage workforce, and coupled with the agriculture sector employed the largest proportion of Washington's BIPOC populations, and people without educational credentials;

WHEREAS, individuals with postsecondary credentials were the least likely to be unemployed or underemployed throughout the pandemic;

WHEREAS, the number of computer science and IT-based jobs has remained stable throughout the pandemic, and even grown in certain technology sectors, and employers report long vacancy periods when hiring;

WHEREAS, the healthcare industry has performed heroically to meet the needs of Washingtonians throughout the pandemic while experiencing tremendous staff shortages in almost all health subsectors and at all levels;

WHEREAS, the health of small business is integral to the economic vitality of communities across Washington, especially in our rural regions and BIPOC neighborhoods in urban areas;

WHEREAS, the economic sectors that drove our state's economic growth and prosperity before the pandemic are likely to be the fuel that drives our state's economic recovery;

WHEREAS, some industry sectors have begun rebounding economically and many displaced workers have returned to work, reducing the state's unemployment rate from its high of 16.6 percent in April 2020 to 6 percent by January 2021, yet as many Washingtonians remain disconnected from the labor force as did during the height of the Great Recession of 2008-9;

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<sup>1</sup> American Community Survey – Historical Real Median Household Income for Washington.

WHEREAS, the individual components of the state's workforce development infrastructure cannot meet the needs of the hundreds of thousands of workers and businesses affected by the pandemic working in their siloes, within existing resources,

WHEREAS, local economies and communities must be a respected focal point of State agency effort and attention so that in particular rural and poor communities may be strengthened and benefited by State agency efforts; and

WHEREAS, the state of Washington should lead the nation in creating an ecosystem for inclusive and equitable economic recovery post-pandemic;

WHEREAS, Local Workforce Development Boards are enduring, collective impact organizations that are business-led and working in tandem with local economic development agencies are responsible for convening and leading the workforce system in each community across the state and actively responding to meet the unique needs of regional businesses, local economies and their diverse workforces; and

WHEREAS, WorkSource is a known brand and outlet for employment and training services offered to job seekers, career builders and businesses needing talent and

WHEREAS, the Workforce Training and Education Coordinating Board, the state's policy, planning, and performance accountability board for workforce development, focuses on the continuous improvement of the system to ensure that every Washington community is thriving, inclusive, and economically resilient; and

WHEREAS, the Workforce Training and Education Coordinating Board is tri-partite, with equal representation from the business, labor, and government sectors, and performs its work collaboratively with the Employment Security Department, Office of Superintendent of Public Instruction, State Board for Community and Technical Colleges, Department of Human and Social Services, Department of Commerce, Department of Services for the Blind, and leaders in the organized labor movement, business community, and local workforce development agencies, among other workforce stakeholders;

WHEREAS, Workforce Training and Education Coordinating Board partners have agreed to pursue a joint, collective impact campaign focused on career opportunities for pandemic-affected workers, to work as partners to ensure all Washingtonians are able to earn income at a family-sustaining level;

WHEREAS, the Self-Sufficiency Calculator is calibrated to the true cost of living for each county and municipal area of the state and to 719 different family types and sizes, enabling meaningful impact goal-setting and measurement tracking that recognizes the variation between and among Washington's communities;

WHEREAS, self-sufficiency relies on development of quality, family wage jobs and necessitates full engagement of the business community to identify mutually beneficial ways to sustain business enterprises and family wages; and

WHEREAS, the success of this collective impact initiative depends on the active and sustained engagement and contributions of a broad range of stakeholders, the Workforce Training and Education Coordinating Board and its partners will establish transparent and public facing communication channels

and resources, including marketing and recruitment materials, a performance tracking dashboard, stakeholder input mechanisms, guides on partnerships, innovations and promising practices, and other progress updates.

NOW THEREFORE, I, Jay Inslee, Governor of the state of Washington, direct the Workforce Training and Education Coordinating Board and Washington State agencies to implement the \_\_\_\_\_ Campaign.

I hereby direct the executive agencies and collective impact partners below to consider the goals of this economic recovery and design plans to advance the State's full and equitable recovery. Plans should show substantial compliance by [mid-year date?]. By October 1, 2022, they shall also submit to my office any additional barriers they identify that may be addressed through future executive or legislative action.

**Workforce Training and Education Coordinating Board:** The effectiveness of the \_\_\_\_\_ Campaign will be one of the top priorities of the Workforce Training and Education Coordinating Board over the next 4 years. Performance updates, with data disaggregated by demography and geography, will be reported publicly at each regularly scheduled board meeting. Board staff will compile from partners and report periodically to the Board information on activities, funds, innovations, partnerships, and other items that are specific to progress of the initiative.

**Employment Security Department:**

**Department of Social and Health Services (including the Division of Vocational Rehabilitation):**

**Department of Commerce:**

**Department of Service for the Blind:**

**State Board for Community and Technical Colleges:**

**Office of Superintendent of Public Instruction:**

**Local Workforce Boards and Economic Development Partners:** as full partners provide assistance to State agencies in development of respectful access to community organizations, locally sourced advice, projects, and other resources as might be helpful.



## The Self-Sufficiency Standard

WHAT A DIFFERENCE A MEASURE MAKES

The Self-Sufficiency Standard measures how much income is needed for a family of a certain composition in a given place to adequately meet their basic needs—*without public or private assistance*. The Self-Sufficiency Standard makes it possible to determine if families' incomes are enough to meet basic needs.

*The Standard assumes that all adults (whether married or single) work full-time and includes the costs associated with employment*—specifically, transportation and taxes, and for families with young children, child care.

*The Standard takes into account that many costs differ not only by family size and composition, but also by the age of children*. While food and health care costs are slightly lower for younger children, child care costs are much higher—particularly for children not yet in school—and are a substantial budget item not included in the official federal poverty measure.

### The Self-Sufficiency Wage for Select U.S. Cities, 2020

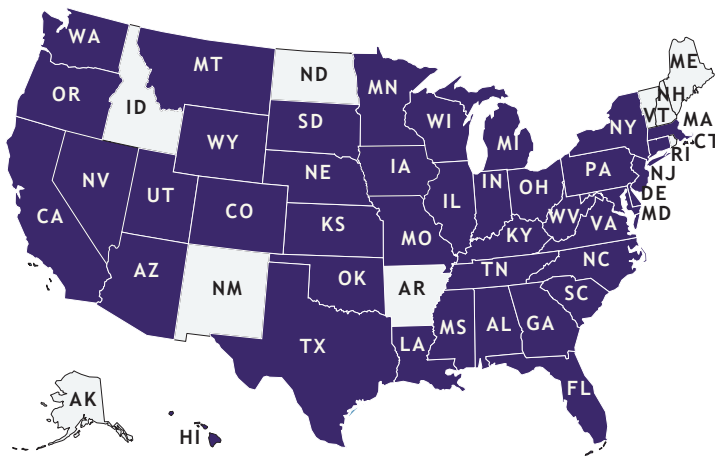
One Adult, One Preschooler, and One School-Age Child

San Francisco, CA**	\$64.86
Northwest Brooklyn, NY**	\$48.99
Boston, MA**	\$47.41
Seattle, WA**	\$39.35
Los Angeles, CA	\$37.64
Chicago, IL**	\$34.18
Denver, CO**	\$33.48
Newark, NJ**	\$30.14
Hartford, CT**	\$30.02
Pittsburgh, PA**	\$28.88
Atlanta, GA**	\$26.48
Houston, TX	\$24.88

### HOURLY SELF-SUFFICIENCY WAGE

\*\*Wage calculated assuming family uses public transportation

**The Self-Sufficiency Standard is Calculated for 41 States**  
Plus the District of Columbia & New York City



*The Standard accounts for regional variations in cost*. This feature is particularly important for housing. Housing in the most expensive areas of the country costs four times as much as in the least expensive areas for equivalent size units.

*The Standard includes the net effect of taxes and tax credits*. It accounts for state sales taxes, payroll (Social Security) taxes, and federal and state income taxes. Tax credits available to working adults—such as the Child Care Tax Credit, the Child Tax Credit, and the Earned Income Tax Credit—are “credited” against income, thus reducing the amount needed to become economically self-sufficient.

*The Standard accounts for the fact that various costs increase at different rates over time*. For example, food costs, on which the official poverty thresholds are based, have not increased as fast as housing costs in most areas. This failure to account for differential inflation rates among other non-food basic needs is one reason that the federal poverty thresholds are no longer an adequate measure of the income required to meet real needs.

The Self-Sufficiency Standard establishes a family sustaining wage specific to most families throughout the United States by making real-world assumptions, varying data regionally and by family type, and including the net effect of taxes and tax credits. A Self-Sufficiency Wage means the family or individual is on the road to economic independence.



CENTER FOR WOMEN'S WELFARE

UNIVERSITY of WASHINGTON

School of Social Work

# HOW THE SELF-SUFFICIENCY STANDARD HAS BEEN USED

The Self-Sufficiency Standard is currently being used to better understand issues of income adequacy, to create and analyze policy, and to help individuals striving to meet their basic needs. Community organizations, academic researchers, policy institutes, legal advocates, training providers, community action agencies, and state and local officials, among others are using the Standard.

## POLICY ADVOCACY

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Local United Ways in North Carolina use the Self-Sufficiency Standard to address community problems, many through collaborative efforts with government, business, and other nonprofit organizations. The Self-Sufficiency Standard helps local United Ways and their partners build a case for collaborative strategies that will meet community challenges and create lasting change.

In Virginia, Voices for Virginia's Children successfully advocated for the state's TANF Authorization Committee to use the Virginia Self-Sufficiency Standard as a tool for setting eligibility guidelines.

The Self-Sufficiency Standard was an integral tool to increase Maryland's EITC by an additional \$40 million for the state's low-income families.

Alabama Arise led a coalition that successfully advocated for more progressive taxes, increasing the income level at which families begin paying taxes.

Pennsylvania used the Standard as an analysis of the impact of proposed increased child care co-payments on low-income working parents. This analysis was instrumental in preventing the proposed increase.

## BENCHMARK FOR EVALUATION

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Sonoma County, California adopted the Standard as its formal measure of self-sufficiency and benchmark for measuring success in welfare to work programs.

Under its Workforce Investment Act, the Chicago Workforce Investment Board adopted the Self-Sufficiency Standard as its self-sufficiency benchmark.

Counselors at the San Francisco Labor Council calculate vocational ESL students' self-sufficiency level at the beginning and end of the program to gauge the effectiveness of the courses and program.

## COUNSELING TOOL

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In Washington State, the Self-Sufficiency Calculator is an online tool created by the Workforce Development Council of Seattle-King County to support career planning with customers and to track progress toward economic self-sufficiency.

In Oregon, the Prosperity Planner, a Self-Sufficiency Standard online counseling tool is used by WorkSource Center staff to determine Training scholarship awards and support service needs of

job seekers. It is also used as a financial counseling tool for job seekers.

## LIVING WAGE CAMPAIGNS

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Many employers have used the Standard to set living wage policies, including Pennsylvania CAP agencies and the California Child Care Workforce.

The Standard has been used in California, Illinois, New York, New Jersey, Hawaii, Nebraska, South Dakota, Tennessee, Virginia, and Washington State to advocate for higher wages through Living Wage ordinances and in negotiating labor union agreements.

## COMMUNITY INDICATOR

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Various states in the Kids Count! project use the Standard as an indicator of economic well-being or security.

Rise Together Bay Area released a dashboard of data tables from their Promoting Family Economic Security Report to track progress on their coalition's goals.

The Missouri Women's Council of the Department of Economic Development used the Standard in the development and promotion of a career program for low-income women that encourages non-traditional career options that pay self-sufficiency wages.

In Portland, Oregon, the City of Portland uses the Self-Sufficiency Standard as one of their core "Measures of Success" in the Portland Plan.

## FOR MORE INFORMATION

Information about the Self-Sufficiency Standard and related research and methodology can be found at [www.selfsufficiencystandard.org](http://www.selfsufficiencystandard.org) or by contacting the Center for Women's Welfare at the University of Washington (206) 685-5264 or [cwwsss@uw.edu](mailto:cwwsss@uw.edu).

## THE SELF-SUFFICIENCY STANDARD

### FREQUENTLY ASKED QUESTIONS AND ANSWERS

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#### Q: WHAT IS THE SELF-SUFFICIENCY STANDARD?

**A:** The Self-Sufficiency Standard defines the income working families need to meet their basic necessities *without private or public assistance*. Basic minimum needs include: housing, child care, food, transportation, health care, miscellaneous expenses (clothing, telephone, household items), and taxes (minus federal and state tax credits). The Standard is calculated for 719 different family types (originally 70) for each county or area in a state.

#### Q: HOW IS THE SELF-SUFFICIENCY STANDARD DIFFERENT FROM THE OFFICIAL FEDERAL POVERTY GUIDELINES (FPG)?

**A:** The Federal Poverty Guidelines (FPG) are a five-decades-old calculation based on the cost of food, and assumes that food is one-third of a family's budget. The Standard is based on the costs of all basic needs of a working family—not just food, but also housing, child care, health care, transportation, miscellaneous costs, plus taxes and tax credits. Unlike the FPG's one-size-fits-all model which varies costs just by the size of the family and number of children, the Standard costs also vary by the age of the children—for example, child care costs differ dramatically by age. Finally, while the FPG is the same throughout the entire continental U.S. the Standard varies for each county or area in a state.

#### Q: HOW CAN I USE THIS DATA?

**A:** The data was developed to provide a more accurate measure of what families must earn in order to meet their basic needs in a county and family specific manner. The Standard has been used by government entities, advocates and service providers to assess and to change policies and programs in a number of ways including: as a benchmark for evaluation and program improvement; as a guideline for determining eligibility and need for services; as a counseling tool; to create online calculators; as a public education tool; and as a guideline for wage-setting and living wage campaigns. For more examples of the ways organizations apply the Self-Sufficiency Standard in their work please visit [www.selfsufficiencystandard.org/standard-practice](http://www.selfsufficiencystandard.org/standard-practice). Whenever a state is funded, Self-Sufficiency Standard data is released and available to the public on [www.selfsufficiencystandard.org/](http://www.selfsufficiencystandard.org/). We just ask that you cite the University of Washington, Center for Women's Welfare, Self-Sufficiency Standard.

#### Q: WHERE DOES THE DATA COME FROM?

**A:** In general, for each category, data comes from scholarly or credible sources, such as the U.S. Census Bureau; are updated annually; and are age- and geographically-specific, as appropriate. Whenever available, the Standard uses government-calculated numbers of what is minimally adequate, such as the USDA food budgets based on nutrition requirements, or HUD's Fair Market Rents for housing assistance.

#### Q: HOW IS THE SELF-SUFFICIENCY STANDARD CALCULATED?

**A:** First, the basic costs for each family type (which vary by number and age of children, and by number of adults) are added in each county. Ten percent of this total is added for miscellaneous costs. Finally, taxes and tax credits are calculated using formulas that calculate the state and federal income and payroll taxes as well as sales tax (where applicable).

### **Q: WHAT STATES HAVE CALCULATED SELF-SUFFICIENCY STANDARDS?**

**A:** The Standard has been calculated for 41 states, Washington D.C. and New York City. Standards are available for Alabama, Arizona, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maryland, Massachusetts, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Jersey, New York City, New York State, North Carolina, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Washington State, West Virginia, Wisconsin, Wyoming, and the Washington, D.C. metropolitan area.

### **Q: THE SELF-SUFFICIENCY WAGES SEEM TOO HIGH FOR MY REGION, ARE THEY?**

**A:** No. Because the Self-Sufficiency Standard is calculated using the real costs of goods and services purchased in the regular marketplace, it reflects the real expenses consumers face. The Self-Sufficiency Standard is a no-frills budget that does not allow for entertainment, carry-out or fast food, savings, or emergency expenses such as car repairs. Nevertheless, many families lack a Self-Sufficiency level income and manage to survive. If they do, however, it is reasonable to assume that they are either receiving assistance meeting their needs with public or private subsidies, or they are foregoing one or more needs such as using less desirable child care, doubling-up or living in substandard housing, obtaining free food or doing without, or not obtaining needed health care.

### **Q: ISN'T THE SELF-SUFFICIENCY STANDARD UNREALISTIC FOR MOST WORKERS?**

**A:** No. The Self-Sufficiency Standard sets a goal for workers. Achieving self-sufficiency is a process that involves not just finding a job with certain wages and benefits, but achieving income security over time. There are several ways—separately or in combination—that workers can achieve self-sufficiency. They can receive temporary work supports until their wages increase. In addition, they can obtain training or education that will prepare them for higher-wage jobs. Finally, they can combine low-wage jobs with self-employment initiatives.

### **Q: ISN'T IT UNREALISTIC TO EXPECT EMPLOYERS TO PAY WORKERS THESE WAGES?**

**A:** Yes, sometimes it is unrealistic. Yet it is reasonable to hold employers responsible for paying decent wages and providing benefits, such as health insurance and benefits to their workers. At the same time, employers are only one of several stakeholders who have a role in ensuring that families have incomes sufficient to cover their costs. The government has a role in ensuring that job training and education, as well as public supports such as child care assistance, are affordable and accessible to families.

### **Q: DOES THE SELF-SUFFICIENCY STANDARD OFFER HISTORICAL ANALYSIS? WAGE ADEQUACY MODELING?**

**A:** Yes, the Self-Sufficiency Standard reports provide both a historical analysis and wage adequacy modeling of locally available work supports in reports funded by our partners (see [Washington State's 2020 report](#)). The historical analysis reviews how the Self-Sufficiency Standard changes over time from previous year calculations. The historical analysis also offers a comparison of the Self-Sufficiency Standard change over time with the Consumer Price Index (CPI) inflation, often showing that CPI underestimates the real cost of living increases. Additionally, the Center for Women's Welfare also provides wage adequacy modeling, demonstrating how essential public benefits can increase wage adequacy so families are able to make ends meet.

## **FOR MORE INFORMATION**

Information about the Self-Sufficiency Standard and related research and methodology can be found at [www.selfsufficiencystandard.org](http://www.selfsufficiencystandard.org) or by contacting the Center for Women's Welfare at the University of Washington (206) 685-5264 or [cwwsss@uw.edu](mailto:cwwsss@uw.edu).

## The Self-Sufficiency Standard

WHAT A DIFFERENCE A MEASURE MAKES

### WHAT IS THE SELF-SUFFICIENCY STANDARD?

The Self-Sufficiency Standard defines the amount of income necessary to meet basic needs (including taxes) without public subsidies (e.g., public housing, food stamps, Medicaid or child care) and without private/informal assistance (e.g., free babysitting by a relative or friend, food provided by churches or local food banks, or shared housing). The family types for which a Standard is calculated range from one adult with no children, to one adult with one infant, one adult with one preschooler, and so forth, up to two-adult families with six teenagers.

### WHY WAS THE SELF-SUFFICIENCY STANDARD DEVELOPED?

The Self-Sufficiency Standard was created in the mid-1990s by Dr. Diana Pearce, who at that time was Director of the Women and Poverty Project at Wider Opportunities for Women. The Standard was intended initially as a performance measure for the goal of “self-sufficiency” in federal job training programs (now known as WIA, the Workforce Investment Act program). It was a measure that provided realistic and detailed data on what clients individually needed to be self-sufficient. First calculated for Iowa in 1996, it experienced a major expansion with funding by the Ford Foundation in the early 2000s, and today, the Standard can be found in 41 states and the District of Columbia.

### HOW DOES THE SELF-SUFFICIENCY STANDARD DIFFER FROM THE FEDERAL POVERTY MEASURE?

First conceived nearly five decades ago by Molly Orshansky, the official federal poverty level has now become out-of-date. The federal poverty level (FPL) is based on USDA food budgets that meet minimal nutritional standards. Because families in the 1950s spent an average of one-third of their income on food, it was assumed that multiplying the food budget by three would result in an amount that would be adequate to meet other basic needs as well. Since its creation, the FPL has only been updated for inflation. FPL thresholds reflect the number of adults and children, but they do not vary by age of children, nor by place.

#### THE FEDERAL POVERTY LEVEL

Food is assumed to be 1/3 of the budget.



#### THE SELF-SUFFICIENCY STANDARD

Based on the real cost of all basic needs.



## FOR MORE INFORMATION

Information about the Self-Sufficiency Standard and related research and methodology can be found at [www.selfsufficiencystandard.org](http://www.selfsufficiencystandard.org) or by contacting the Center for Women's Welfare at the University of Washington (206) 685-5264 or [cwssss@uw.edu](mailto:cwssss@uw.edu).



# HOW IS THE SELF-SUFFICIENCY STANDARD CALCULATED?

The Self-Sufficiency Standard is the amount needed to meet each basic need at a minimally adequate level, *without public or private assistance*. The Standard is calculated for over 700 family types for all counties in a state. The Self-Sufficiency Standard assumes adult household members work full time and therefore includes all major costs associated with employment for adult household members (i.e., taxes, transportation, and child care for families with young children). The basic data components and assumptions included in the calculations are briefly described below.



**HOUSING.** Housing costs are based on the U.S. Department of Housing and Urban Development Fair Market Rents (FMRs). FMRs include utilities, except telephone and cable, and reflect the cost of housing that meets basic standards of decency. FMRs are set at the 40th percentile, meaning that 40% of the decent rental housing in a given area is less expensive than the FMR and 60% is more expensive. FMRs within a multi-county metropolitan area are adjusted using median gross rents from the U.S. Census Bureau's American Community Survey.



**CHILD CARE.** Child care includes the expense of full-time care for infants and preschoolers and part-time—before and after school—care for school-age children. The cost of child care is calculated from market-rate costs (defined as the 75th percentile) taken from a state-commissioned survey by facility type, age, and geographic location. It does not include extracurricular activities or babysitting when not at work.



**FOOD.** Food assumes the cost of nutritious food prepared at home based on the U.S. Department of Agriculture Low-Cost Food Plan. The Low-Cost Food Plan was designed to meet minimum nutritional standards using realistic assumptions about food preparation time and consumption patterns. The food costs do not allow for any take-out or restaurant meals. Food costs are varied by county using Feeding America's *Map the Meal Gap* data based on Nielsen scans of grocery receipts.



**TRANSPORTATION.** Public transportation is assumed if 7% or more of workers use public transportation to get to and from work. Private transportation costs assume the expense of owning and operating a car. Per-mile costs are calculated from the American Automobile Association. Commuting distance is computed from the National Household Travel Survey. Auto insurance premiums are the average statewide premium cost from the National Association of Insurance Commissioners, indexed by county using premiums from top market share automobile insurance companies. Fixed costs of car ownership are calculated using Consumer Expenditure Survey amounts for families with incomes between the 20th and 40th percentile. Travel is limited to commuting to work and day care plus one shopping trip per week.



**HEALTH CARE.** Health care costs assume the expenses of employer-sponsored health insurance. Health care premiums are the statewide average paid by workers, for single adults and for families, from the Medical Expenditure Panel Survey. A county index is calculated from rates for the lowest cost 'silver' plan from the U.S. Centers for Medicare & Medicaid Services. Out-of-pocket costs are from the Medical Expenditure Panel Survey Insurance Component.



**MISCELLANEOUS.** Miscellaneous expenses are calculated by taking 10% of all other costs. This expense category consists of all other essentials including clothing, shoes, paper products, diapers, nonprescription medicines, cleaning products, household items, personal hygiene items, and telephone service.



**TAXES AND TAX CREDITS.** Taxes include federal income tax, payroll taxes, and state and local sales taxes where applicable. Tax credits calculated in the Standard include: the federal Earned Income Tax Credit (EITC), Child and Dependent Care Tax Credit (CCTC), and the Child Tax Credit (CTC).



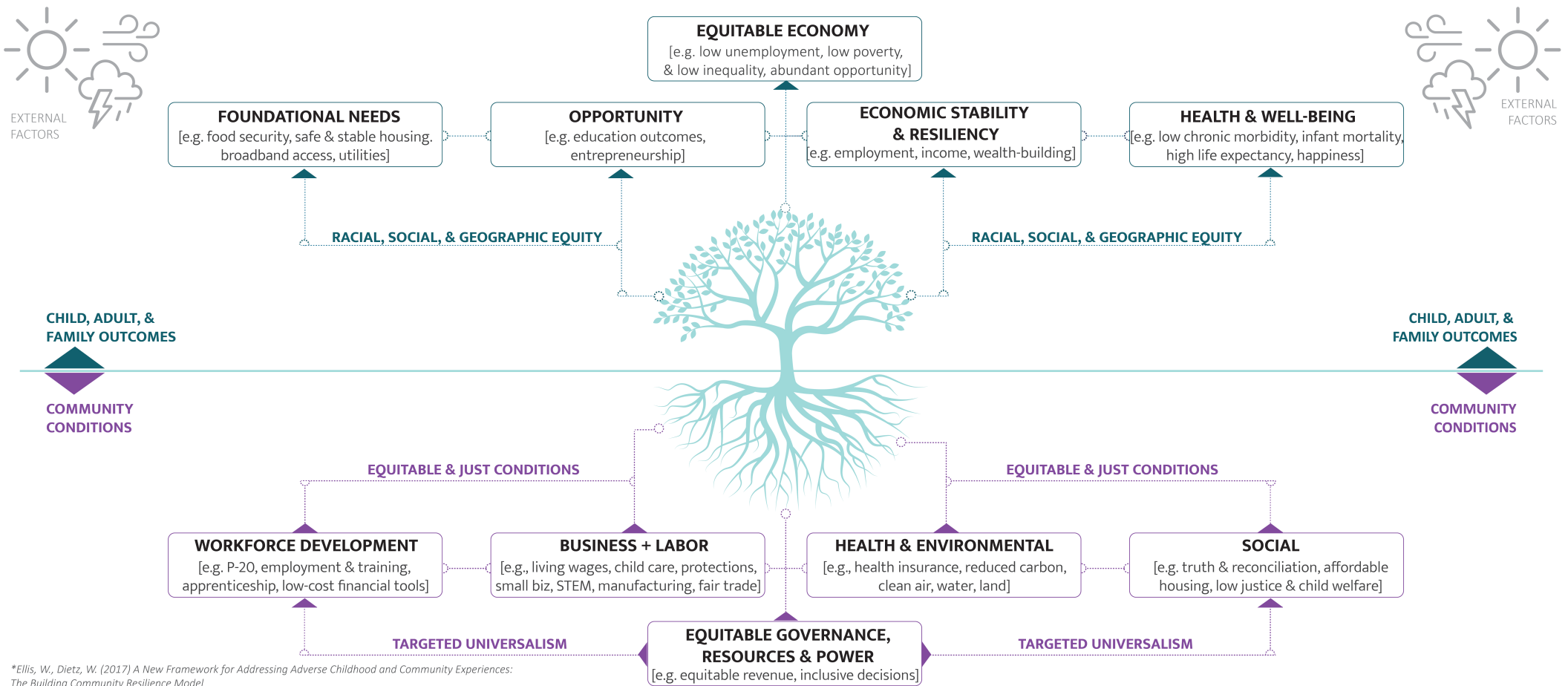
**EMERGENCY SAVINGS.** Emergency savings is the amount needed to cover living expenses when there is job loss net of the amount expected to be received in unemployment benefits. The amount calculated takes into account the average tenure on a job and the average length of unemployment of workers. In two-adult households, the second adult is assumed to be employed so that the savings only need to cover half of the family's basic living expenses over the job loss period.



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\*Ellis, W., Dietz, W. (2017) A New Framework for Addressing Adverse Childhood and Community Experiences:  
The Building Community Resilience Model