

Benton - Franklin Workforce Development Council

October BFWDC Executive Committee [Hybrid |
In-person TC Futures]



Photo courtesy of Visit TriCities



Benton - Franklin Workforce Development Council

October BFWDC Executive Committee [Hybrid | In-person TC Futures]

Date: Tuesday, Oct. 29, 2024 | **Time:** 3:00 PM – 3:45 PM PDT | **Location:** TC Futures - 825 N. Edison Street Suite 100, Kennewick, WA

Attendees: Executive | Staff: Benton Franklin Workforce Development Council

Agenda

1. Call to Order	Todd Samuel, Board Chair	
1.1 Board Member/BFWDC Staff Roll Call & Excused Absences	Cyndelle Howell, Administrative Coordinator	3:00 pm (2 min)
1.2 Visitor/Presenter Welcome	Todd Samuel, Board Chair	3:02 pm (2 min)
1.3 Host Welcome and Tour	Todd Samuel, Board Chair	3:04 pm (15 min)
2. Approval of Minutes		3:19 pm (3 min)
3. Finance Report	DeAnn Bock, Fiscal Director	3:22 pm (5 min)
4. Economic Security For All (EcSA) Programs Update	Jessie Cardwell, Workforce Programs Manager	3:27 pm (13 min)
5. Executive Member Round Table	Todd Samuel, Board Chair	3:40 pm (5 min)
6. Meeting Adjourned	Todd Samuel, Board Chair	3:45 pm

2. Approval of Minutes



Benton Franklin Workforce Development Council (BFWDC)

Executive Committee Minutes

September 24, 2024, 4:00 p.m., Zoom

Call to Order & Welcome

Todd Samuel called the meeting to order at 4:01 p.m. Todd welcomed all in attendance and thanked them for taking the time to support the mission and vision of the BFWDC.

Gabby Torres conducted a roll call of board members and staff to the board, and a quorum was present. Todd and Gabby welcomed virtual guests, asking them to communicate their names and organization using the Zoom chat feature. Todd reminded those in attendance to have cameras on, to capture who was speaking.

Minutes

July 30 and August 27, 2024, Executive Committee meeting minutes were presented and reviewed for a motion to approve.

Todd Samuel called for a motion to approve the Executive Committee meeting minutes from the July 30 and August 27, 2024, Committee meeting.

Amanda Jones motioned to approve; Adolfo de Leon seconded and unanimously approved.

BFWDC Finance Reports as submitted for the period ending July 2024 – DeAnn Bock

Statement of Budget to Actual Expenditures (For Period 7/1/24 – 9/15/24)

The financials were included in the packet. DeAnn Bock presented the finance reports, detailing donations received through PayPal and Stripe. She clarified the donation process and the recent updates to the donation page.

Staff Accountant

DeAnn Bock announced the departure of Nidia and the plan to rehire a staff accountant.

CliftonLarsenAllen (CLA) Audit

The CLA audit has been rescheduled to December, with DeAnn working on the necessary documents.

BFWDC Updates – Cynthia N. Garcia /All

PY23 State Monitoring Report

The state monitored 40 participant files and reported no findings, unresolved questioned costs, or disallowed costs during the monitoring. While there were no major findings, the state did identify some minor issues related to data entry by case managers that the BFWDC needs to address. The BFWDC will be putting a local monitoring plan in place to ensure they are closely tracking and addressing the data entry issues identified by the state. The state will also be reviewing the BFWDC's report on the data entry issues during their next visit to ensure the BFWDC is properly addressing them. Overall, the BFWDC received a very positive monitoring report, with no significant findings or issues identified. Cynthia Garcia and the BFWDC team were commended for their excellent work and quality assurance efforts. The PY23 state monitoring resulted in a clean report for the BFWDC, with only minor data entry issues that the organization is proactively addressing through enhanced local monitoring and oversight. Cynthia expressed gratitude to the team as she is aware that this takes a large amount of focus, quality assurance, collaboration, and knowledge to have no findings.



WSCB Memorandum of Understanding and Infrastructure Agreement (MOU/IFA)
BFWDC Staff are actively updating the WSCB MOU and IFA to reflect the current partnership, responsibilities, and strategic goals, intending to make it a more meaningful and useful document for all involved.

- WIOA Title 1 Youth Services are provided at both Workforce Columbia Basin and TC Futures.
- Connection Sites (Grace Kitchen and Mid-Columbia Library Benton-City)
- Partners' contact information
- Partner responsibilities and goals
- Strategic Goals and Objectives- per our local strategic plan
- IFA allocations by program

BFWDC wants to ensure the MOU and IFA are living documents the partners refer to and use to guide their partnership, rather than just static documents. Cynthia asked for any additional feedback.

Current Funding Opportunities

Digital Equity Grants:

BFWDC submitted two applications for digital equity grants in partnership with the Washington Workforce Association (WWA). These funds intend to ensure equitable access to broadband and digital resources across underserved communities, as well as to create a strong, consistent digital navigator program. The BFWDC is requesting \$681,000 through the WWA grant application for this four-year program.

Goodwill Grant Application:

The BFWDC also submitted a \$299,000 grant application in partnership with Goodwill for a four-year program. The purpose of this grant is similar to the digital equity grants, focused on providing digital skills training, purchasing devices, and making internet access more affordable for customers and the general population.

Three Rivers Community Foundation Grant:

BFWDC, in collaboration with Crystal Bright, wrote a proposal to the Three Rivers Community Foundation to request unrestricted funds. The goal is to have funds available to provide customers with immediate needs, such as transportation, tools, or other items, without requiring them to go through a full enrollment process for a program. The project was named "SUCCEED" (Services Unlocking Comprehensive Community Enrichment and Empowering Dreams).

BFWDC is actively seeking various diverse grant opportunities to expand its ability to support the community and provide more comprehensive services to its customers.

Programs and Business Services Overview – Jessie Cardwell

Department of Commerce Visit 09/18/24

On 09/18/24, the Department of Commerce Grant Manager, who is responsible for overseeing Community Reinvestment Funds, and the Employment Security Department Grant Manager visited the Benton Franklin Workforce Development Council leadership and Career Path Services. During the 2-hour meeting, they discussed how the local area is utilizing the Community Reinvestment Funds, including the use of incentives and business services. The Department of Commerce representatives were enthusiastic about the local implementation and had candid conversations about participants potentially staying in the program longer due to the \$1,000/month incentives. BFWDC acknowledged the risk but clarified that their aim is not to incentivize people to stay in the program, but rather to enable them to make better



long-term decisions about their careers and education. Jessie reported that the Department of Commerce visit was positive, with representatives expressing excitement about the work being done locally with the Community Reinvestment Funds.

Economic Security for all Tour 10/23/24

Jessie Cardwell mentions the upcoming Economic Security for All tour. The tour will highlight the state's Economic Security for All (EcSA) program and the Community Reinvestment Funds. Legislators and media will be invited to participate in the tour. The tour will start at the WorkSource Columbia Basin office, where John Traugott Washington Workforce Association Executive Director will provide an overview of EcSA. The BFWDC will then overview the local implementation of EcSA, and Career Path Services will discuss their work as a pilot area. The group will then visit one of the businesses that have received Community Reinvestment Funds to discuss the impact on their business. They will also speak with participants about how the Community Reinvestment Funds have affected their lives, with a focus on the ALICE (Asset Limited, Income Constrained, Employed) population.

Community Reinvestment Funds – Match Investment Savings Accounts

During the meeting, Jessie Cardwell announced that the BFWDC plans to introduce a new "Match Investment Savings Account" as part of the Community Reinvestment Funds. This account will enable participants to save money, and the BFWDC will match their savings 2-to-1, up to \$10,000. The program is open to EcSA (Economic Security for All) and WIOA Title 1B program participants. The primary objective is to assist participants in accumulating capital that they can utilize to start their businesses or achieve other financial goals. The BFWDC is collaborating with a local bank (Washington Trust Bank) to establish the infrastructure for these match investment savings accounts.

Board Elections – October

The annual board elections are scheduled for Tuesday, October 29, Cynthia presented the pending officer positions for election.

- Board of Directors Chair: Todd Samuel
- Vice Chair: Adolfo de Leon
- Board of Directors Treasurer: Todd Samuel
- Board of Directors Secretary: Lynn Ramos-Braswell

This information has gone to the full board of directors, and as of today, staff have not received any nominations or interest from other board members. Cynthia requested current officers to inform BFWDC staff via email whether they are interested in continuing serving in their current role for another year and to submit their interest and nominations by the end of the day on Monday, October 28.

Recruitment Packet

Cyndelle has created a Board of Directors Recruitment packet, containing all the information needed for potential new members interested in joining the BFWDC. The packet aims to help new board members understand their roles and responsibilities and integrate smoothly into the organization. It provides information about the BFWDC's history, values, and governing practices, and includes an application for potential new board members to complete. The BFWDC is seeking feedback from the current board members on the recruitment packet by the end of this week. The goal is to finalize the packet as soon as possible, but additional time can be provided if needed. Once finalized, the recruitment packet will be distributed to the full board. The BFWDC plans to use this packet for the onboarding of new board members going forward.



Board Onboarding and Orientation Outline

Cynthia presented the board orientation checklist for review and discussion. The outline is designed to help new board members understand their roles and responsibilities and smoothly integrate into our organization. It includes familiarizing new board members with the BFWDC's history, values, and governing practices. The goal is to complete onboarding and orientation within 30 days of a new board member joining. However, the BFWDC recognizes that this timeline may be flexible depending on the needs of the new board member. The BFWDC is seeking feedback from current board members on the onboarding and orientation outline by the end of this week. Once finalized, the onboarding and orientation outline will be implemented for all new board members. The BFWDC wants to ensure new members feel confident, informed, and empowered to contribute effectively from the start. The development of this comprehensive onboarding and orientation outline demonstrates the BFWDC's commitment to properly integrating and supporting new board members as they join the organization.

Board Buddy – Mentor Program

Board buddies play a crucial role in creating a welcoming and supportive environment for our new board members. The guidance provided by our experienced board members is essential in ensuring that new members feel confident, informed, and empowered to make effective contributions from the beginning of their term.

Currently, there is one new board member, John Raschko representing Business, who still needs to be assigned a board buddy. The BFWDC staff has not expanded the search to other board members yet, as they would prefer to start with the executive committee members first.

Amanda Jones has volunteered to mentor John Raschko.

Calendar of Events – Quarterly Center Tours

Program Year 2024 Board Retreat

Staff are proposing our PY24 Board Retreat on March 12, 2025. They plan to reach out to board members interested in hosting the event at their facility.

Scheduling of Center Tours

The BFWDC has scheduled WorkSource Columbia Basin tours and is coordinating with Crystal Bright to ensure the tour times work for participants. Staff have also coordinated with Melanie regarding tours of the TC Futures location.

New Member Election (Needs a vote)

Cynthia N. Garcia presented Amelia Kittson, Executive Vice President of KIE (Kennewick Industrial and Electrical Supply), a family-owned and operated business since 1955. Amelia is responsible for setting and managing the company's comprehensive strategic direction, vision, and day-to-day operations. She works with management to set individual and collective goals aligned with overall company goals and develops and executes plans to achieve desired results. Amelia identifies areas for process improvement and leads initiatives to enhance operational performance. She develops and manages budgets for various departments and implements cost-control measures intended to optimize resource allocation. Additionally, she handles official communication on behalf of the company, signs official documents, and makes legally binding decisions.

Amelia has expressed a strong desire to continue making a positive contribution in our community by helping shape a workforce development system that meets the needs of employers and individuals.



Cynthia requested a motion to move forward with the process of appointing Amelia Kittson as a board member representing the business sector.

Todd called for a motion to approve the appointment of Amelia Kittson as a board member, representing business.

Todd motioned to approve; Lynn Ramos-Braswell seconded and unanimously approved.

Donation Page and Corporate Sponsorship

DeAnn Bock presented a report on the donations received through the BFWDC's PayPal and Stripe accounts since the donation page was launched. The donations ranged from \$5 to \$300, with the most recent donation being \$99.34. Cynthia Garcia mentioned that the BFWDC wants to update the donation page to include testimonials from clients about how the donated funds have been used, such as to purchase bus passes. They are still waiting to receive additional testimonials to feature on the page. Cynthia Garcia acknowledged that the BFWDC needs to do a better job of promoting the donation page and website to increase awareness and donations. DeAnn Bock noted that the most recent donations came from BFWDC staff, and she encouraged board members to also consider making donations. The BFWDC is open to feedback from board members on how to improve the donation page and the information presented about the use of donated funds.

Round Table

Todd Samuel opened the floor for any additional comments or noteworthy updates from the participants. No comments or good of the order items were discussed.

Adjournment

Todd Samuel adjourned the executive committee meeting at 5:12 p.m.

Next Meeting

Executive Committee Meeting – Tuesday, October 29, 2024, 3:00 p.m. TC Futures | Zoom Hybrid
 Quarterly Board Meeting – Tuesday, October 29, 2024, at 4:00 p.m. TC Futures | Zoom Hybrid

Attendance

Chief Local Elected Officials	Board Members	Staff to the Board	Guests	Excused
Clint Didier	Todd Samuel	DeAnn Bock	Jan Warren	Cyndelle Howell
Will McKay	Amanda Jones	Cynthia Garcia	Heather Woodruff	
	Lynn Ramos-Braswell	Gabby Torres		
	Adolfo de Leon	Jessie Cardwell		

Respectfully Submitted:

 Todd Samuel, Board Chair & Treasurer Date

 Lynn Ramos-Braswell, Board Secretary Date

3. Finance Report

Benton Franklin Workforce Development Council
Statement of Budget To Actual Expenditures



(May Contain Unposted Transactions)
 For Period July 01, 2024 - October 15, 2024

EXPENSES	CURRENT FISCAL YEAR				
	2024 - 2025				
	YEAR-TO-DATE ACTUALS - OCTOBER 2024	YEAR-TO-DATE BUDGET - OCTOBER 2024	YEAR-TO-DATE PERCENT OF BUDGET	CURRENT YEAR BUDGET	PERCENTAGE OF TOTAL BUDGET
Sub-Recipient Reimbursements	\$ 1,213,884	\$ 1,476,628	82%	\$ 4,429,883	27%
Rent and Facilities	\$ 17,632	\$ 15,580	113%	\$ 45,791	39%
Salaries and Wages	\$ 150,284	\$ 214,197	70%	\$ 649,033	23%
Professional Services and Contracts	\$ 4,083	\$ 37,120	11%	\$ 65,920	6%
TC Futures	\$ 15,000	\$ 20,000	75%	\$ 60,000	25%
Travel and Training	\$ 2,048	\$ 23,200	9%	\$ 48,000	4%
Supplies, Furniture and Equipment	\$ 1,021	\$ 1,000	102%	\$ 3,000	34%
Equipment and Software - Lease and Maintenance	\$ 3,864	\$ 8,645	45%	\$ 17,000	23%
Communications (Telephone, Postage and Internet)	\$ 363	\$ 723	50%	\$ 2,170	17%
Advertising and Outreach	\$ 254	\$ -	0%	\$ -	0%
Insurance	\$ 8,742	\$ 8,000	109%	\$ 8,000	109%
Dues, Fees and Subscriptions	\$ 14,368	\$ 13,970	103%	\$ 15,552	92%
Business/Community	\$ -	\$ -	0%	\$ -	0%
TOTAL YEARLY EXPENSES	\$ 1,431,543	\$ 1,819,063	78.70%	\$ 5,344,349	27%

*Rent & Facilities - over budget due to Goodwill final operating cost reconciliation. (\$2876.88)

*Advertising & Outreach - expense for Connection Site signage

Benton Franklin Workforce Development Council
PRIOR YEAR-TO-DATE COMPARISONS



(May Contain Unposted Transactions)
 For Period July 01, 2024 - October 15, 2024

EXPENSES	CURRENT FISCAL YEAR	PRIOR YEAR-TO-DATE COMPARISONS		
	2024 - 2025	2023 - 2024	2022 - 2023	2021 - 2022
	YEAR-TO-DATE ACTUALS - OCTOBER 2024	PREVIOUS YEAR ACTUALS - OCTOBER 2023	PREVIOUS YEAR ACTUALS - OCTOBER 2022	PREVIOUS YEAR ACTUALS - OCTOBER 2021
Sub-Recipient Reimbursements	\$ 1,213,884	\$ 596,017	\$ 726,580	\$ 983,720
Rent and Facilities	\$ 17,632	\$ 15,705	\$ 15,931	\$ 21,934
Salaries and Wages	\$ 150,284	\$ 349,003	\$ 289,602	\$ 290,354
Professional Services and Contracts	\$ 4,083	\$ 32,383	\$ 35,731	\$ 36,348
TC Futures	\$ 15,000	\$ 15,000	\$ 15,870	\$ 20,000
Travel and Training	\$ 2,048	\$ 10,720	\$ 8,546	\$ 3,524
Supplies, Furniture and Equipment	\$ 1,021	\$ 1,370	\$ 10,640	\$ 1,103
Equipment and Software - Lease and Maintenance	\$ 3,864	\$ 4,220	\$ 5,216	\$ 8,300
Communications (Telephone, Postage and Internet)	\$ 363	\$ 595	\$ 662	\$ 1,411
Advertising and Outreach	\$ 254	\$ -	\$ -	\$ -
Insurance	\$ 8,742	\$ 8,249	\$ 7,679	\$ 7,606
Dues, Fees and Subscriptions	\$ 14,368	\$ 14,023	\$ 24,737	\$ 13,967
Business/Community	\$ -	\$ -	\$ -	\$ -
TOTAL YEARLY EXPENSES	\$ 1,431,543	\$ 1,047,285	\$ 1,141,194	\$ 1,388,267

Benton Franklin Workforce Development Council
Balance Sheet - Unposted Transactions Included In Report
As of 8/31/2024

10 - Corporate Entity

	<u>Current Period Balance</u>
Asset	
Cash (Checking Acct - CE)	944.88
Corporate Entity MM Account	<u>33,373.69</u>
Total Asset	<u>34,318.57</u>
Liabilities	
Accrued Vacation Payable	37,277.37
Due to/from other funds	<u>(32,000.00)</u>
Total Liabilities	<u>5,277.37</u>
Net Assets	29,041.20
Total Liabilities and Net Assets	<u>34,318.57</u>

Benton Franklin Workforce Development Council
Corporate Entity
Statement of Cash Flows
For PY 2024-2025
(In whole numbers)

Unposted Transactions May Be Included In Report

Month:	Jul-2024	Aug-2024	Sep-2024	Oct-2024	Nov-2024	Dec-2024	Jan-2025	Feb-2025	Mar-2025	Apr-2025	May-2025	Jun-2025	Year total
Cash on Hand (beginning cash)	2,435	2,181	945	909	909	909	909	909	909	909	909	909	2,435
RECEIPTS from Support													
Interest/Program Income													0
Donations/Contributions (unrestricted)		384											384
Grant Revenue		3,380											3,380
													0
TOTAL RECEIPTS	0	3,764	0	0	0	0	0	0	0	0	0	0	3,764
DISBURSEMENTS for Operations													
Donation fees	0												0
Professional Services and Contracts	0												0
Community/Business	0	5,000	36										5,036
Dues, Fees and Subscriptions	0												0
Advertising and Outreach	254												254
Non WIOA Expenses													0
													0
TOTAL DISBURSEMENTS	254	5,000	36	0	0	0	0	0	0	0	0	0	5,290
NET CASH FOR THE PERIOD	(254)	(1,236)	(36)	0	0	0	0	0	0	0	0	0	(1,526)
ENDING CASH	2,181	945	909	909	909	909	909	909	909	909	909	909	909

Benton Franklin Workforce Development Council
Balance Sheet - Unposted Transactions Included In Report
As of 8/31/2024

30 - WSCB Partnership

	<u>Current Period Balance</u>
Asset	
Cash (Bank Acct - WSCB)	50,018.71
Total Asset	<u>50,018.71</u>
Other Assets	
ROU Asset - Leases	309,620.00
Total Other Assets	<u>309,620.00</u>
Liabilities	
Accounts Payable (AP System)	16,592.29
IFA Adjustment	5,493.36
Lease Liability - Short Term	<u>313,334.00</u>
Total Liabilities	<u>335,419.65</u>
Net Assets	24,219.06
Total Liabilities and Net Assets	<u>359,638.71</u>

Benton Franklin Workforce Development Council
Statement of Revenues and Expenditures - Unposted Transactions Included In Report
30-WSCB Partnership From 7/1/2024 - 8/31/2024

(In Whole Numbers)

	Current Period Actual	Current Period Budget	Percentage of current period	Annual Budget	Percentage of Total Budget
Revenue					
Partner Revenue	38,652	38,652	100%	231,912	17%
Sub-Lease Revenue	28,134	28,134	100%	168,802	17%
Total Revenue	66,786	66,786	100%	400,714	17%
Expenses					
Rent	53,931	53,931	100%	323,585	17%
Facilities - Security & Maint	13,611	4,560	298%	30,890	44%
ESD Managed Print/Equipment	541	3,400	16%	20,400	3%
Software - Maint/Licensing	2,465	2,500	99%	2,500	99%
Supplies (Office Expenses)	1,827	1,575	116%	9,150	20%
Community Outreach	0	850	0%	5,000	0%
Shredding	590	582	101%	3,489	17%
EO Accomodation	2,517	950	265%	5,700	44%
	75,482	68,348	110%	400,714	19%
Net Surplus/ (Deficit)	(8,696)	(1,562)			

4. Economic Security For All (EcSA) Programs Update



September 2024

State and Federal EcSA Program Performance Summary (Cumulative from July 2024 - June 2025)			
Program Expenditures	Program Budget	YTD Spent	Percent Expended
Federal EcSA	\$111,301	\$13,614	12%
State EcSA	\$515,909	\$75,215	15%
Eligible Participants Enrolled	Actual Outcomes	Quarterly Target	Program Target
Federal EcSA – Below 200% FPL	11	27	45
State EcSA – Below 200% FPL	195	95	115
State EcSA – Above 200% FPL	16	3	12
Training Placements for employment at/above income self-sufficiency calculator goal	Actual Outcomes	Quarterly Target	Program Target
Federal EcSA – Below 200% FPL	0	3	12
State EcSA – Below 200% FPL	7	2	5
State EcSA – Above 200% FPL	4	1	5
Exits at or above income self-sufficiency calculator goal	Actual Outcomes	Quarterly Target	Program Target
Federal EcSA – Below 200% FPL	1	0	6
State EcSA – Below 200% FPL	4	5	20
State EcSA – Above 200% FPL	2	0	7

Success Story:

Alvaro, 47, entered the WIOA State EcSA program after engaging with WorkSource as a dislocated worker after having worked as a home care aid for 10+ years. Alvaro was previously the main financial provider for his family and was unsure how he was going to make ends meet as his unemployment benefit was significantly less than what his wages were. He wanted to pursue short-term training so he could jump into the workforce. Alvaro was motivated to earn a certification as a truck driver to obtain full-time employment that would lead him to self-sufficiency. Staff assisted Alvaro in formulating his employment plan that included training and job search needs. Shortly after enrolling, Alvaro was able to obtain program funding to help pay for his Class A CDL and Hazmat endorsement at H&R Elite. Through engagement in the program, staff also worked together with the customer to ensure the customer was provided wraparound services. Shortly after receiving his CDL, Alvaro started a job with a potato company making \$22 hourly. He has been able to alleviate his barriers and reach his goals through program support.

Other great work:

In quarter one, the Business Solutions Team hosted a CDL workshop, veteran resume workshop, a small business workshop, and hosted several meet-the-employer events, including Alternative Nursing Solutions, Two Rivers Correctional Institution, and PSSI. Outreach has been conducted at the Business After Hours at Tri-Cities, Small Business Resource Fair, and other events highlighted in the CRF report.

Most crucial support service needs:

The most critical support services provided to customers in quarter one were transportation, driver’s ed courses, testing fees, tools, utilities, and housing.

In partnership:

Meet & Greets are currently held each week, with a rotating schedule of Spanish and English sessions. In recent months, Columbia Basin College has started attending the Spanish Meet & Greets, significantly enhancing the quality of service provided to monolingual Spanish speakers. As peak season approaches, there has been an increase in attendance. Staff will monitor and adjust accordingly.

September 2024

Community Reinvestment Funds (CRF) (Cumulative from December 2023- May 2025)			
Bucket	Program Budget	YTD Spent	Percent Expended
Incentives	\$1,677,850	\$772,797	46%
Business Navigator and Subsidized Training	\$630,000	\$202,345	32%
	Actual	Goal	Program Target
Participants Receiving Incentives	191	22	169
Employers Engaged	136	30	75
*CRF Employers Engaged	136	20	50
EcSA Participants Engaged	1	15	35
**Non EcSA Participants Engaged	13	15	35
*Black, Latine, and Indigenous owned and operated businesses.			
**Employees from Black, Latine, and Indigenous owned and operated businesses who are not eligible for EcSA.			
CRF Successes:			
<p>During the July-September quarter, Business Navigators had the privilege of assisting Taxes D and Notary, a tax preparation service with a strong focus on serving the Spanish-speaking community. This minority-and women-owned business, led by Diana Gomez, sought our assistance in securing training and certification opportunities for herself and one of her employees.</p>			
<p>With the support of the Community Reinvestment Funds (CRF), Diana and her employee were able to attend the IRS Tax Forum in Dallas, Texas, where they obtained critical course certifications that would allow them to take on more complex cases. In addition, they completed the Bilingual Federal Tax Pro Course, expanding the range of services they can offer their community. Moreover, they are set to attend the National Society of Tax Professionals Seminar in San Antonio, Texas on October 28, 2024, where they will gain the credentials needed to represent taxpayers before the IRS, further elevating their professional standing and expanding their business capabilities.</p>			
<p>The importance of a business like Diana's in the Spanish-speaking and broader minority community is vital. Diana provides a trusted service to individuals who often find interactions with the IRS intimidating, especially when language barriers are present. Her ability to relate to their unique socio-economic challenges creates a space of safety and trust for her clients, further cementing her role as an indispensable resource for underserved populations.</p>			
<p>Additionally, this quarter marked a significant milestone as staff successfully connected our first EcSA-enrolled participant with a CRF-involved business. Nick, a TC Futures participant, who had received support through both the EcSA programs and the CRF incentive program, secured employment with Alcon Media, a local radio station known for its commitment to social justice and community engagement. Nick was hired as a Marketing Specialist, a role perfectly aligned with his career focus in media marketing. This is a prime example of how the CRF has had a profound and lasting impact by providing opportunities for both businesses and individuals within the community.</p>			





September 2024

Target Populations served:

This quarter, Business Navigators achieved great success in diversifying the population served. While the majority of the businesses staff work with are Latino-owned, staff were thrilled to connect with three additional Black-owned businesses, two of which are also women-owned. Additionally, staff established relationships with two Asian-owned businesses, one of which is women-owned, further expanding our reach within the community. However, staff faced challenges in engaging with Tribal-owned businesses due to their lower demographic presence in the Benton-Franklin area. Staff have initiated steps to remedy this by exploring resources specifically available for Tribal communities and establishing communication pipelines between them and WorkSource Columbia Basin. Additionally, staff have leveraged existing connections to refer new businesses, such as Golden Triangle Asian Market, referred to us by the owner of Masala Indian Cuisine.

CRF Business Gives Back:

One of the standout events this quarter was the Professional Headshot Day held on 08/29/2024 at the WorkSource Columbia Basin office. This event was a collaboration with one of the businesses funded by the CRF, Hello Habanero, which gave back to the community by offering free professional headshots to WorkSource participants. This service, which typically costs anywhere from \$150 to \$500, was offered completely free of charge, benefiting numerous participants. The event was a great example of the full-circle impact of CRF funds, as many of our micro-grant recipients also attended for photo opportunities, and even WorkSource employees had the chance to update their professional headshots.

Subsidized Training:

This quarter, staff successfully employed nine (9) individuals through the Work Experience (WEX) program, including one EcSA/CRF-enrolled job seeker. These placements provided businesses with the support needed to expand their operations while offering job seekers valuable hands-on experience.

In addition to WEX placements, staff assisted three businesses—Taxes D and Notary, Embrace the Darkness LLC, and Happy Little Hands Childcare—in offering work-based training. The training programs undertaken by the owners and employees of these businesses were designed to expand services and increase employment retention, directly aligning with the CRF's workforce development goals.



September 2024

QUEST Summary			
Cumulative Dec. 1st, 2022-September 30, 2025			
Program Expenditures	YTD Spent	Program Budget	Percent Expended
As of September 30, 2024	\$383,205	\$546,036	70%
Enrollments	Actual Outcomes	Monthly to Date Target	Annual Target
Total Planned Participants	104	87	103
Services	Actual Outcomes	Monthly to Date Target	Annual Target
Receiving Career Services	104	87	103
Receiving Individual Training Accounts (ITA)	55	48	53
Completing ITA	39	32	37
Receiving Supportive Services	27	21	25
Exits	Actual Outcomes	Monthly to Date Target	Annual Target
Total Employed Exits	63	42	60

Success Story:

In May 2024, David, a veteran facing long-term unemployment, enrolled in the Quest program. His financial situation was dire, with his income 200% below the federal poverty line following his termination from Simplot in November 2023. Despite possessing a forklift certification, David had been unable to secure employment and had exhausted his unemployment benefits. Upon enrollment, David faced significant barriers to employment: food insecurity, an unreliable vehicle, and insufficient funds for an effective job search. The Quest program funded repairs for David's vehicle, helped with fuel costs, and offered comprehensive job search support. Through diligent effort and program support, David successfully secured full-time employment. On September 9, 2024, he accepted a position at Lamb Weston as a materials handler, earning \$23.88 per hour with full benefits. David's experience exemplifies the Quest program's efficacy in addressing the complex challenges faced by long-term unemployed individuals. By providing targeted support to overcome specific barriers, the Quest program enabled David to transition from severe financial hardship to stable, well-compensated employment in his desired field.

Customer Challenge:

Staff have noticed some difficulties in assisting customers who have been long-term unemployed. These individuals often find it more challenging to re-enter the workforce due to extended absences, which can lead to skill atrophy and a lack of recent work experience. This makes them less competitive in the job market and often requires more intensive support and retraining efforts. Staff work closely with customers to address these possible barriers through comprehensive assessments, training, individualized plans, and other services.

Business Engagement:

The Business Navigator held a CDL workshop in quarter one, as it highlights a highly sought-after occupation in the Benton and Franklin area. Columbia Basin Truck Driving School presented information on training and the field overall to prepare drivers on what to expect. CDL workshops will be implemented on a consistent schedule to meet the needs.

Additionally, Quest staff participate in the integrated Business Solutions team at WorkSource Columbia Basin and TC Futures. In quarter one, the Business Solutions team has continued to meet and work with a variety of small businesses in the community to build better connections. Based on this outreach, a small business workshop was held that highlighted resources for small business owners in the area.

5. Executive Member Round Table

6. Meeting Adjourned

- Executive Committee Meeting – Tuesday, November 28, 2023, 4:00 p.m. WSCB Room 7/Zoom
- Board Meeting – Tuesday, January 30, 2023, at 4:00 p.m. WSCB Room 8/Zoom

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Attached Documents:

- 2.1 2024.09.24 Minutes Executive Committee.pdf 8
- 3.1 2024.08 Finacial Reports.pdf 14
- 4.1 2024.09 September EcSA Performance Summaries.pdf 21
- 4.2 2024.09 September QUEST Performance Summary.pdf 24