Leveraging TAA Case Management Funds

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Roles that support program

Valuable tool utilized to review reasons of lay offs

Case examples of petitions filed based on internal research

Lessons learned

"We aim above the mark to hit the mark."
Ralph Waldo Emerson
Roles that support Oregon’s Trade Act program

- Many roles support TAA eligible participants in Oregon’s service delivery
- Today we will focus primarily on the Petition Coordinator and Trade Act Navigator roles and their connection to local Rapid Response
Trade Act Navigator

Primary purpose: Serve as regional point of contact for TAA information for participants, Title 1, Rapid Response, local Workforce Board, Community Colleges, and business community.

• Began December 2015
• Physically located in 7 of the 9 workforce areas
• Assists with entry into, and out of, workforce system
• Active member of local Rapid Response team(s)
• Sits on Community College campuses once a week

• Focus on job development and On-the-Job Training
• Focus on reemployment needs

Funded by case management dollars

TAA Petition Coordinator

Primary purpose: investigate potential trade affects for each lay off across the state. Trade impact identified, work with local Rapid Response team to coordinate efforts to file petition on behalf of affected workers.

- Started in late 2015
- Started by questioning lack of trade impacts reported; one company in particular stood out
- Investigates all layoffs for potential trade impact
- Increases awareness of TAA program through conversations with employers and affected workers
- Bridged important connection to the Office of Trade Adjustment Assistance
Think Differently form... must have tool

- Created to communicate lay off activity from the TAN to the Petition Coordinator
- TAN sends information to local Rapid Response and Petition Coordinator at the same time
- Petition Coordinator updates Rapid Response and TAN on findings
- Decision on who files petition decided if trade found
- Has taken on a life of its own
In Practice…

Intentional approach with collaborative communication!

**Petition Coordinator**
- Investigates all layoffs for potential trade impact
- Emails group on findings
- Offers to file on behalf of workers
- Communicates with OTAA when necessary

**Rapid Response and Trade Act Navigator**
- Learns of layoffs
- TAN sends Think Differently form if they learn of layoff with potential trade that has not been identified
- TAN supports Rapid Response as needed regardless of trade connection

**Think Differently Form**
- When Trade has not been previously known, form completed and emailed to Rapid Response and Petition Coordinator
Overview of service delivery

- Learns of layoffs
- Connects with employer to engage in services
- Communicates workers' needs and reasons for lay off

- Researches layoffs
- Communicates results of research
- Often files petitions on behalf of affected workers
- Once certified, notifies employer and workers

- Interprets assessments
- Provides career guidance
- Approves services and benefits
- Carries primary caseload
- Refers to TAN for assistance on college campuses
- Refers to TAN for reemployment services
- Refers to TAN for OJT’s

- Rapid Response
  - Active partner to Rapid Response
  - If layoffs heard first, notifies both local Rapid Response and TAA Petition Coordinator

- Petition Coord
  - Once certified, facilitates information sessions for eligible workers
  - Facilitates assessment workshops
  - Refers to case managers

- TAN
  - Provides job development
  - Scouts OJT opportunities
  - Provides reemployment services

- Case Manager

Affected worker group- manufactured customized transformers

- Of the 66 TAA participants engaged in services, 63 are co-enrolled with Title 1.
- All participants that were in Title 1 training were transitioned to TAA funded training
- Title 1 attended last Trade Act all staff
Petition Coordinator’s Investigation

**Ongoing activity**
- Regularly check local sites for layoff information
- Educating partners on the changing world of trade
- Keeping up to date on global trends related to exports, imports, outsourcing and near sourcing
- Educating trade staff on findings and what to look for
- Trade staff, in turn, educate others

**Communication with OTAA**
- Guidance
- Education on eligibility criteria
- Clarifications when necessary

**Investigation includes:**
- Google searches based on current news events for global trends
- Checking DOL site for petitions in other states for same company name
- Check for expired petitions for same company
- Look for WARN’s
- Look for ITC rulings on industry
- One piece of information can lead to another- follow the trail

**Receives Think Differently form**
- Connects with RR and TAN
- Connects with worker reporting layoff
- Starts researching reasons for layoffs
Case Examples

Scrap Metal
- China has built a large reservoir of scrap metal giving them a competitive advantage over the US market.
- US Ferrous exports found to be down 20% between September-November 2015
- Able to use this information for 4 petitions - all certified

Food Processing
- Certification found in another state
- CRS Report “The US Trade Situation for Fruit and Vegetable Products” shows gap between imports and exports of $11.4 billion
- Growth of imports outpaced export growth

Bankruptcy
- Oftentimes this is a reported factor for reasons of layoff
- More digging uncovers global trends not necessarily obvious to employer representatives we speak with

In each example, we were told trade was not a factor; Petition Coordinator’s research told a different story.
Results of reviewing each layoff

Increased petitions filed, and certified, as a result of looking into the hidden factors of each layoff

Nationally, highest number of TAA petitions certified and highest number of eligible affected workers in Fiscal 2016
With more certifications, you serve more workers!

Each certification provides necessary funding and benefits to affected workers.

New Eligible Participants

- FY 2015: 500
- FY 2016: 4500
- FY 2017: 3000

- Resources from other programs can be limited
- Potential to hold onto benefit in the event of an economic downturn

Return on Investment

**Petitions and Participants**
Significant increases
- Able to support more workers

**Case Management**
+52%
- Based on 4 quarters proceeding new model and 4 quarters following implementation
- Caught up on grants

**OJT’s**
+250%
- Dedicated job development
- TAN’s scout OJT locations
- Works with local partners to align messaging of all OJT programs

**Partnerships**
- Trade is an active partner at the table
- Integrated member of Rapid Response
- Able to leverage funds across entire system

Lessons learned

We've come a LONG way from where these positions began.

- Petition Coordinator has fine tuned research methods
- Worked through processes with local Rapid Response to ensure employer has one point of contact
- Trade Act Navigator needs to be able to market program to diverse groups
- Navigator needs to be comfortable going into unchartered territory
- Connectivity between all roles in TAA program had to be fine tuned
Oregon’s Rapid Response System
https://www.youtube.com/watch?v=wqN8vbMmQZo

Rapid Response – Melissa Martinez’s Story
https://www.youtube.com/watch?v=67vjzvi_4Kk

Oregon Trade Act Overview
https://www.youtube.com/watch?v=t3HCYwJcmK0

“Success is not final. Failure is not fatal. It is the courage to continue that counts.” Winston Churchill
Thank you!

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