

Meeting Agenda for:

Central Virginia Workforce Development Board

October 11, 2022

3:00 - 4:30 p.m.

at

The Lynchburg Regional Business Alliance

300 Lucado Place

Lynchburg, VA 24504

TO ATTEND THE MEETING VIRTUALLY ON MICROSOFT TEAMS, USE THIS LINK:

<https://tinyurl.com/zat6dxae>

1. **Roll Call:***Traci Blido, CVWDB Executive Director*
2. **Call to Order and Introductions***Nat Marshall, Board Chair*
3. **Public Comment**.....*Nat Marshall*
4. **Approval of July 12, 2022 Minutes**.....*Nat Marshall*
5. **Director’s Report** *Traci Blido*
6. **Finance Report**.....*Tonya Hengeli, CVPDC Finance Director*
7. **Special Appearances from community partners**
 - a. Little Otter Flower Farm*Jennifer Kohn & Max Kohn, owner*
 - b. Old Dominion Job Corps Center.....*Bryan Lyttle ; James Davis*
8. **Consideration of Program Policy #106 revision**.....*Lori Cumbo, Operations Coordinator*
 - a. Program Policy #106 Customized and Incumbent Worker Training (*removing requirement for 6 or more to be trained*)
9. **One-Stop Center Operations/Title I Report** *Keith Cook, Director of Workforce Operations*
10. **Youth Services end-of-year report**..... *Sarah Grant, Youth Services Coordinator*
11. **Committee Reports:**
 - a. Youth – Dr. Bobby Johnson, Superintendent, Campbell County Schools
 - b. DEI – Renee Chalmers, VEC Workforce Services Office Manager
 - c. Operations & Performance – Andy Crawford, ACSW, Director, Bedford County
 - d. Finance – Ron Lovelace, CPA

e. Executive – Nat Marshall, BWXT

12. **Adjournment** Next Meeting is Tuesday, Jan. 10, 2022 at 3:00 p.m.

Note: This meeting will be recorded for public viewing and posted at vcwcentralregion.com.



Central Virginia Workforce Development Area VII

Serving the City of Lynchburg, and Counties of Amherst, Appomattox, Bedford and Campbell

Workforce Development Board Meeting
July 12, 2022
3:00 p.m. at
The Lynchburg Regional Business Alliance
Lynchburg, VA 24504

Draft – until board approves.

Members Present: Nat Marshall – Chair, Lauren Anderson, Gary Campbell, John Capps, Anthony Cardoza, Renee Chalmers (virtual), Travis Griffin (virtual), Michael Hertzler, Christine Kennedy, Ron Lovelace, Bryan Lyttle (virtual), John Redding, Rich Russo, Jason Shockley (virtual), Dorothy White, Sterling Wilder, Christian Wiscovitch.

Members Absent, Excused:

Members Absent: Andrew Crawford, Andrew Tisosky, Charles Mann, Sam Penn, Sr., Cheryl Giggetts, Cheryl Toler, Dana Hogan, Luke Saechao, Alisha Meador, Michael (Scott) Francis, Robbie Morrison, Robert Johnson, Sierria Phillips, Sonya Todd, Samuel Pinn.

Staff Present: Traci Blido, Alec Brebner, Keith Cook, Lori Cumbo, Tonya Hengeli, Tim Saunders, Sarah Singer (virtual).

Others Present: Shirley Dodson (virtual).

1. Roll Call

Nat Marshall asked everyone in attendance, both in person and virtually, to introduce themselves and share their title. Traci Blido checked attendance based on these introductions.

2. Call to Order and Greetings from the Chair

Nat Marshall welcomed everyone and opened the meeting at 3:01 PM.

3. Public Comment

Nat Marshall opened the floor for public comment. No one expressed an interest in providing comments to the board.

During this time Nat mentioned that three new members had been added to the Central Virginia Workforce Development Board by the Council of Chief Local Elected Officials (CLEO). The new members added to the

board are Alisha Meador, Dorothy White, and Christian Wiscovitch. 14 board members were also reappointed by the CLEO council.

Nat also introduced Alec Brebner as the new Executive Director of the Central Virginia Planning District Commission, the workforce board's fiscal agent. Nat acknowledged the board's close ties to the CVPDC. Alec introduced himself and shared information about his background and previous work experience.

4. Approval of April 12, 2022 Minutes

Nat entertained the motion for approval of the April 12, 2022, meeting minutes. The motion was made by Christine Kennedy and seconded by Gary Campbell. The motion was unanimously approved as presented.

5. Director's Report

Traci thanked everyone for attending the meeting during the summer season when many other activities are demanding attention.

Traci mentioned the announcement made by KDC/One, regarding the company's planned closure of its Lynchburg facility by the end of 2023. Traci said board staff does not expect KDC/One to lay off any workers until the first quarter of 2023. She talked about the possibility of enrolling some impacted workers in the Title I Dislocated Worker program after layoffs take place. Traci said the company is still trying to fill orders and is taking steps to retain its workforce, such as offering financial incentives. She said board staff would work with organizations, such as the Jubilee Family Development Center located near the KDC/One facility, to offer hiring events and opportunities for workers to learn about new career opportunities in the community. A list of impacted workers is expected to be made available to board staff, via the Rapid Response process, when the company issues a WARN notice and begins laying off workers.

Nat Marshall asked whether the KDC/One facility will be sold. Christine Kennedy said the facility needs major work. She said KDC/One looked at other facilities in the Lynchburg area in an effort to possibly relocate its operation, but was unable to find a suitable facility that met the company's needs. She expects the facility to become an "asset" for the region but indicated it will need significant upgrades.

Traci acknowledged that a handful of employers reached out to board staff when the KDC/One closure was made public via press reporting. She said HR managers at local companies want to hire workers from KDC/One and have sought referrals from board staff. Traci said board staff would be in a better position to make referrals after KDC/One officially issues a WARN notice and begins laying off its workforce. She said board staff would be contacting employers moving forward.

Sterling Wilder said the Jubilee Center would work with CVCC and other partners to ensure KDC/One workers received re-training for high-demand job opportunities in the community. Nat Marshall wondered when workers would be eligible for Dislocated Worker funding through the Title I program. Keith Cook said funding would be available to workers within six months of their layoff notification. He emphasized that funding is available now through other sources, such as the Virginia G3 initiative, to pay for workers to retrain right now.

Rich Russo inquired whether Virginia Career Works would be available to assist workers on site at KDC/One when layoffs are announced. Traci Blido confirmed that such assistance would be available.

Traci continued her Director's Report by talking about the board's strategic plan. She said the board's current strategic plan expired in June 2022 and talked about how board staff is working with the Lynchburg Regional Business Alliance to develop a new five-year strategic plan for regional workforce development. Christine Kennedy shared a presentation outlining areas of focus for the strategic planning process and next steps.

Nat Marshall emphasized the workforce board's role as the regional convener of workforce development. He said it's important that the business alliance's role in this process not cause confusion for employers. Christine said the joint effort between the board and the alliance should mitigate confusion. Traci said the strategic plan would likely cost approximately \$39,000 and that the board should expect to invest approximately \$5,000, underscoring the need for a partnership with the business alliance.

Lastly, Traci asked Tim Saunders to highlight upcoming events involving Virginia Career Works. Tim mentioned that staff would participate in a street festival hosted by the Campbell County Library System in Rustburg on July 30 and an event hosted by One Community, One Voice at the University of Lynchburg on August 6. Tim said staff was also planning to host a Hiring Event and Resource Fair for justice-involved individuals sometime over the next few weeks at the Virginia Career Works Lynchburg Center.

6. Finance Report

Tonya Hengeli provided a finance review with a Comparison of Budget to Actual and Summary of WIOA Funding as of 05/30/22. (Handouts of the reports were included in the agenda packet and available at the meeting.) Tonya pointed out that \$200,000 had been transferred from the WIOA Title I Dislocated Worker funding stream to the Adult funding stream for the PY '21 program year. Traci said the reason for this transfer was that there was a greater demand for services in the Adult program than for the Dislocated Worker program. Keith Cook said only 12 people were enrolled in the Dislocated Worker program during PY '21. Tonya said the budget summary contained an unspent amount of \$589,019.67 that may be available for carryover to the PY '22 budget, depending on June expenses. Nat Marshall reminded board members that a carryover amount is needed to cover board expenses until it receives its PY '22 allocation from the Federal government, which may not be received until October. Keith Cook pointed out that some savings were realized during PY '21 due to strategic decisions made in July of 2021 to eliminate certain positions and not fill vacancies of other positions. He said that new case manager positions would be added in PY '22 to meet the demand of increasing case loads in the Title I programs.

Tonya then showed board members the PY 22 budget, which she referred to as the FY '23 budget. She estimated a transfer of up to \$50,000 may be needed from the Dislocated Worker to Adult funding streams. Tonya pointed out that the PY '22 budget differed from the PY '21 budget because all amounts were shown as rounded figures. She said the budget was crafted with buffers and conservative numbers, anticipating higher expenses for certain line items.

Nat Marshall called for a motion to approve the PY '22 budget (FY '23 budget) as presented, with authorization for board staff to transfer up to \$50,000 from the Dislocated Worker funding stream to the Adult funding stream should that need occur. The motion was made by Ron Lovelace and seconded by Gary Campbell. The motion was unanimously approved as presented.

7. Consideration of Program Policy Provisions

Draft copies of updated policies were presented to amend “Program Policy 102 - Work Ready Services” and “Program Policy 205 – Conflict of Interest”. “Program Policy 102 - Work Ready Services” was amended to remove the \$85 per-week cap on child care costs, provided the overall services offered to the client do not exceed the allowed maximum of \$2,500 per participant in one program year. Nat Marshall called for a motion to approve the amendments to Program Policy 102. The motion was made by Michael Hertzler and seconded by John Capps. The motion was unanimously approved as presented. “Program Policy 205 – Conflict of Interest” was amended to extend current board member conflict of interest provisions to staff employed by the workforce board, including those employed under contracts with the board. Nat Marshall called for a motion to approve the amendments to Program Policy 205. The motion was made by John Capps and seconded by Michael Hertzler. The motion was unanimously approved as presented.

Nat Marshall used time following the discussion about program provisions to extend the board’s sympathy to Lori Cumbo on the passing of her husband, Dean Cumbo, on June 20, 2022.

8. One-Stop Center Operations/Title I Report

Keith Cook provided handouts with graphics highlighting the enrollment increases that have taken place between PY ’20 and PY ’21 in the Title I Youth, Adult, and Dislocated Worker programs. Keith also showed graphics detailing how many people visited the Virginia Career Works Lynchburg Center in PY ’20 versus PY ’21. Keith said visits decreased in PY ’21, but pointed out that most of the visits in PY ’20 were from unemployment filers seeking information about a claim with the Virginia Employment Commission. Keith also showed graphics detailing how many people completed initial assessment forms to seek services through the workforce system. While the number of assessments completed was down significantly in the early months of PY ’21, Keith said he had noticed a large increase in the number of assessments completed during the second half of the program year. Keith also shared a handout that provided a breakdown of the people being served and the ways people are receiving assistance.

Nat Marshall asked whether the location of the Virginia Career Works Lynchburg Center on Odd Fellows Road was hindering people from visiting the center. Keith said he believes the current location on a city bus line with direct connection to major highways was a strength, along with the low cost of rent offered by the Virginia Employment Commission.

9. Youth Services End-of-Year Report:

Youth Program Coordinator Sarah Singer said PY ’21 is the first year basic career services were offered through the youth program in all localities. Across all localities, 141 students met with a career navigator and received a menu of basic career services. Most of the students referred to the program were high school seniors, who received guidance on future plans. 61 of those students followed up with a second visit. Basic services provided included work-readiness assessments, personality assessments, soft skills training, resume building, job search assistance, and post-secondary planning which was the service provided to the largest number of people (52 students). Many students have started formally enrolling in the Title I Youth Program upon their completion of high school.

10. Committee Reports:

Executive Committee – Chairman Nat Marshall reported that the Executive Committee met May 17 to authorize a transfer of up to \$200,000 total from the Title I Dislocated Worker funding stream to the Adult funding stream

for the Fiscal Year 2022 that ends June 30, 2022. Nat Marshall brought this action to the full board for a vote during this meeting. Because this action came from a committee, Nat indicated a second was not necessary. The full board voted unanimously to approve the committee's authorization of a \$200,000 transfer from Title I Dislocated Worker funding to the Adult funding stream.

The committee also authorized workforce board staff to convene a strategic planning team in collaboration with the Lynchburg Regional Business Alliance to develop a regional workforce development strategic plan.

Youth Committee – Sarah Singer said surveys have been distributed to gather feedback from enrolled youth. A meaningful connection has also been made with the superintendent of Lynchburg City Schools to expand the services provided to youth in that locality. Meetings are planned in August with the principals of E.C. Glass High School and the Empowerment Academy to align the youth program with goals of the individual schools. Traci Blido told board members that additional mentors are needed to serve the youth program.

DEI Committee – Renee Chalmers said a foundation is still being laid for this committee. She said they had an amazing visit in May to the Little Otter Flower Farm in Bedford. This initiative allows teens with Autism to receive on-the-job training and skills that allow them to enter the workforce. Committee members enjoyed meeting participants and learning about this demographic.

Finance Committee – Mr. Lovelace said the finance report was already shared during this meeting.

Operations & Performance Committee – Committee chair Andy Crawford was not present to provide an update at this meeting. Traci Blido said a memorandum of understanding has been developed to provide seats for Career Essentials comprehensive work readiness classes to individuals receiving services from Bedford County Social Services.

11. Adjournment

Nat Marshall told board members that they may be asked to participate in the strategic planning process with the Lynchburg Regional Business Alliance and hoped everyone would offer their time and participation if approached.

There being no further business, the meeting was adjourned at 4:40 p.m.

**WIOA Source and Use of Funds
Comparison of Budget to Actual
As of 06/30/22**

SOURCES OF FUNDS	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
LINE ITEM	<u>ADMIN</u>		<u>DISLOCATED</u>		<u>ADULT</u>		<u>Youth</u>		<u>Total</u>	
cash/other income					45,000.00		60,000.00		105,000.00	
PY2020	48,572.25		193,324.02		67,181.35		110,033.71		419,111.33	
PY2021	120,532.00		286,704.00		349,945.00		448,149.00		1,205,330.00	
Transfer				(200,000.00)		200,000.00				0.00
Total Funding	169,104.25		280,028.02		662,126.35		618,182.71		1,729,441.33	
	0.10		0.24		0.29		0.37			
Workforce Development Board										
Salary	24,260.29	13,063.84	57,706.86	62,146.93	70,435.80	73,668.69	90,201.98	106,432.97	242,604.93	255,312.43
Benefits	6,511.45	2,829.84	15,488.48	13,520.77	18,904.92	15,517.71	24,210.15	23,112.23	65,115.00	54,980.55
Audit	4,600.00	4,560.00							4,600.00	4,560.00
Legal	400.00	510.00	951.45		1,161.33		1,487.22		4,000.00	5,100.00
Outreach/awareness	200.00	1,000.00	475.73		580.66		743.61		2,000.00	1,000.00
Contractual Services	1,199.99	4,209.24	2,854.36	3,497.60	3,483.98	3,560.83	4,461.67	4,405.95	12,000.00	15,673.62
Communications Tel/post	500.00	666.43	1,189.32	1,363.92	1,451.66	1,367.37	1,859.03	1,941.66	5,000.01	5,339.38
Ofc & equip lease	1,318.09	1,294.03	3,135.28	4,003.07	3,826.86	3,603.08	4,900.78	4,802.05	13,181.00	13,702.23
Ofc supplies	100.00	160.77	237.86	229.70	290.33	223.33	371.81	310.54	1,000.00	924.34
Travel/Training/Dues	999.99	1,573.50	2,378.63	1,571.69	2,903.31	1,678.66	3,718.06	2,428.98	9,999.99	7,252.83
Furnishings & computer	300.00	1,180.26	713.59	821.59	870.99	740.52	1,115.42	980.47	3,000.00	3,722.84
Fiscal Agent	70,000.00	67,254.84	0.00						70,000.00	67,254.84
Miscellaneous	401.00	718.88	953.83	21.13	1,164.23	19.05	1,490.94	25.21	4,010.00	784.27
Total WIB Office	110,790.81	99,021.63	86,085.39	87,176.40	105,074.07	100,379.24	134,560.67	144,440.06	436,510.93	431,017.33
Workforce Center										
Rent/utilities			3,501.37	3,147.70	13,130.15	9,443.11	12,546.59	6,817.43	29,178.11	19,408.24
IT / Contractual Services			768.00	3,051.71	2,880.00	5,592.33	2,752.00	5,210.10	6,400.00	13,854.14
Phone			102.96	118.91	386.10	355.58	368.94	257.64	858.00	732.13
Internet			123.60	165.41	463.50	496.11	442.90	271.30	1,030.00	932.82
Resource Room Copier			119.16	171.59	446.85	514.70	426.99	371.68	993.00	1,057.97
IT Equip, Softare			324.60		1,217.25		1,163.15		2,705.00	0.00
General Supplies			68.28	129.01	256.05	177.55	244.67	52.56	569.00	359.12
Staff Copier			390.24	564.41	1,463.40	1,693.59	1,398.36	1,223.36	3,252.00	3,481.36
									0.00	0.00
									0.00	0.00
Facility Total	0.00	0.00	5,398.21	7,348.74	20,243.30	18,272.97	19,343.60	14,204.07	44,985.11	39,825.78
Program Operations (HumanKind)	72,758.02		119,661.00	77,119.59	326,511.00	256,422.05	322,166.00	220,665.17	841,096.02	554,206.81
Incumbent Worker Training			25,000.00	19,707.72	0.00				25,000.00	19,707.72
Direct Program Costs (Clients)			57,100.00	19,054.11	192,000.00	173,803.18	150,000.00	86,203.52	399,100.00	279,060.81
Grand Total	183,548.83	99,021.63	293,244.60	210,406.56	643,828.37	548,877.44	626,070.27	465,512.82	1,746,692.07	1,323,818.45
Unallocated	(14,444.58)		(13,216.58)		18,297.98		(7,887.56)		(17,250.74)	0.00
Available Funding Remaining	Available	70,082.62	Available	69,621.46	Available	113,248.91	Available	152,669.89	Available	405,622.88

Contract Balances as of 06/30/22

		Beginning Balance	Billed Or Accrued To Date	Outstanding Balance
HumanKind	Dislocated	119,661.00	83,657.78	36,003.22
HumanKind	Adult	326,511.00	266,876.45	59,634.55
HumanKind	Youth	322,166.00	234,546.10	87,619.90
		768,338.00	585,080.33	183,257.67
VA's Region 2000 LGC Fiscal Agent		70,000.00	67,254.84	2,745.16
	Total Obligations	768,338.00	585,080.33	183,257.67

**Summary of WIOA Funding
As of 06/30/22**

APPROPRIATED BUDGET	EXPENDITURES AS OF 06/30/22	ENCUMBRANCES	REMAINING BALANCE
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WORKFORCE INNOVATION AND OPPORTUNITY ACT

Administrative	169,104	99,022		70,083
Dislocated Worker Program	280,028	210,407	36,003	33,618
Adult Program	662,126	548,877	59,635	53,614
Youth Program	618,183	465,513	87,620	65,050
Total WIOA Funding	1,729,441	1,323,818	183,258	222,365

**WIOA Source and Use of Funds
Comparison of Budget to Actual
as of September 30, 2022**

SOURCES OF FUNDS										
	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual
LINE ITEM	ADMIN		DISLOCATED		ADULT		Youth		Total	
cash/other income					15,000.00		60,000.00		75,000.00	
PY2021	70,082.62		69,621.46		113,248.91		152,669.89		405,622.88	
PY2022	132,170.00		248,877.90		415,965.60		524,686.50		1,321,700.00	
Transfer			(50,000.00)		50,000.00				0.00	
WDB Outreach/Awareness										
Total Funding	202,252.62		268,499.36		594,214.51		737,356.39		1,802,322.88	
	0.10		0.19		0.31		0.40			
Workforce Development Board										
Salary	23,742.16	1,646.10	44,706.80	9,718.48	74,721.34	11,281.50	94,251.25	16,924.20	237,421.55	39,570.28
Benefits	6,480.86	462.38	12,203.54	2,096.44	20,396.57	2,433.58	25,727.62	3,650.86	64,808.59	8,643.26
Audit	4,600.00								4,600.00	0.00
Legal	400.00		1,000.00		1,200.00		1,400.00		4,000.00	0.00
WDB Outreach/Awareness	200.00		500.00		600.00		700.00		2,000.00	0.00
Contractual Services	2,000.00	272.46	3,600.00	1,608.57	3,800.00	1,867.27	4,700.00	2,801.25	14,100.00	6,549.55
Communications Tel/post	600.00	198.18	1,300.00	198.98	1,400.00	231.19	1,800.00	346.87	5,100.00	975.22
Ofc & equip lease	1,300.00	331.77	3,600.00	949.79	3,800.00	854.55	5,000.00	1,144.35	13,700.00	3,280.46
Ofc supplies	175.00	10.89	500.00	46.04	275.00	53.45	350.00	80.18	1,300.00	190.56
Travel/Training/Dues	500.00	38.78	2,000.00	337.76	3,000.00	388.59	3,500.00	1,122.95	9,000.00	1,888.08
Furnishings & computer	1,200.00	81.53	1,000.00		1,000.00		1,000.00		4,200.00	81.53
Fiscal Agent	70,000.00	14,508.10							70,000.00	14,508.10
Miscellaneous	400.00		800.00		1,000.00		1,500.00		3,700.00	0.00
Total WIB Office	111,598.02	17,550.19	71,210.34	14,956.06	111,192.91	17,110.13	139,928.87	26,070.66	433,930.14	75,687.04
Workforce Center										
Rent/utilities			4,000.00		14,000.00		12,000.00		30,000.00	0.00
IT / Contractual Services			1,000.00	323.81	4,000.00	647.54	4,000.00	574.14	9,000.00	1,545.49
Phone			150.00	37.72	400.00	104.64	350.00	76.77	900.00	219.13
Internet			210.00	43.94	500.00	131.92	400.00	95.24	1,110.00	271.10
Resource Room Copier			200.00	42.90	400.00	128.67	400.00	92.91	1,000.00	264.48
Staff Copier			625.00	151.32	1,600.00	447.42	1,320.00	338.83	3,545.00	937.57
General Supplies			100.00	114.35	200.00	132.74	240.00	218.49	540.00	465.58
IT Equip/Software			500.00		800.00		1,080.00		2,380.00	0.00
Facility Total	0.00	0.00	6,785.00	714.04	21,900.00	1,592.93	19,790.00	1,396.38	48,475.00	3,703.35
Program Operations (HumanKind)	70,000.00		80,000.00	10,734.09	250,000.00	52,615.49	300,000.00	43,328.70	700,000.00	106,678.28
Incumbent Worker Training			25,000.00	1,215.00	0.00				25,000.00	1,215.00
Direct Program Costs (Clients)			60,000.00	1,770.00	200,000.00	71,296.39	150,000.00	60,230.48	410,000.00	133,296.87
Grand Total	181,598.02	17,550.19	242,995.34	29,389.19	583,092.91	142,614.94	609,718.87	131,026.22	1,617,405.14	320,580.54
Unallocated	20,654.60		25,504.02		11,121.60		127,637.52		184,917.74	0.00
Available Funding Remaining	Available	184,702.43	Available	239,110.17	Available	451,599.57	Available	606,330.17		1,481,742.34

Contract Balances as of 05/30/22

		Beginning Balance	Billed Or Accrued To Date	Outstanding Balance
HumanKind	Dislocated	80,000.00	10,734.09	69,265.91
HumanKind	Adult	250,000.00	52,615.49	197,384.51
HumanKind	Youth	300,000.00	43,328.70	256,671.30
		630,000.00	106,678.28	523,321.72
VA's Region 2000 LGC Fiscal Agent		70,000.00	14,508.10	55,491.90
	Total Obligations	630,000.00	106,678.28	523,321.72

**Summary of WIOA Funding
As of 05/30/22**

APPROPRIATED BUDGET	EXPENDITURES AS OF 05/30/22	ENCUMBRANCES	REMAINING BALANCE
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WORKFORCE INNOVATION AND OPPORTUNITY ACT

Administrative	202,253	17,550		184,702
Dislocated Worker Program	268,499	29,389	69,266	169,844
Adult Program	594,215	142,615	197,385	254,215
Youth Program	737,356	131,026	256,671	349,659
Total WIOA Funding	1,802,323	320,581	523,322	958,421



CENTRAL REGION

Title: Incumbent Worker Training Policy	
Effective Date: 10/11/2022	Revised Date:

Purpose

To establish local policy and procedure on implementing Incumbent Worker Training funding activities through the Workforce Innovation and Opportunity Act (WIOA) Title I Adult and Dislocated Worker programs.

References:

- VWL 16-05 Change 1 Incumbent Worker Training
- VWL 16-05 Change 1 Attachment A Incumbent Worker Training Data Entry Process
- VWL 16-05 Change 1 Attachment B Incumbent Worker Training Eligibility Documentation
- VWL 16-05 Change 1 Attachment C Incumbent Worker Training Required Data Elements
- Workforce Innovation and Opportunity Act of 2014 Section 122 and Section 134
- Training and Employment Guidance Letter (TEGL) WIOA No. 03-15, Guidance on Services Provided through the Adult and Dislocated Worker Program under the Workforce Innovation and Opportunity Act and Wagner Peyser, as Amended by WIOA, and Guidance for the Transition to WIOA Services
- Workforce Innovation and Opportunity Act; Employment and Training Administration. Labor Final Rule, Subpart F—Work-Based Training Sections 680.700 through 680.840
- Virginia Board of Workforce Development (VBWD) Policy 403-04 Incumbent Worker Training

Policy

Incumbent Worker Training is a form of work-based training that is designed to ensure that employees of a company are able to acquire the skills necessary to retain employment and advance within the company, thus creating backfill opportunities for the employer, or to provide skills necessary to avert a layoff. It is designed to either assist workers in obtaining the skills necessary to retain employment or to avert layoffs and must increase both a participant’s and a company’s competitiveness. Incumbent Worker Training may be provided to a single firm or a group of firms that share similar needs using WIOA Title I Adult and Dislocated Worker funds and are paid directly to the employer for reimbursement for training costs. Up to 20% of local WIOA Title I Adult and Dislocated Worker program allocated funds may be reserved and used to pay for the federal share of the cost of providing a training program for incumbent workers. Statewide rapid response funds may also be requested from the Virginia Community College System (VCCS) for additional Incumbent Worker Training activities beyond local formula funds.

Procedure

Employer Eligibility

All employers that request funding for Incumbent Worker Training will be evaluated based on the following criteria:

- Demonstration of linkages of the training activity to demand occupations and/or regionally targeted industries.
- All training will be for industry sectors identified as in demand in the labor market and determined to be of priority in the region's Local Plan.
- Staff may request a waiver for training outside of these target sectors and occupations. Waivers must be requested, with all required documentation, and approved by the CVWDB Director prior to approving funding for the participant. Waiver documentation must include, at a minimum:
 - Justification by the employer of the industry being in-demand
 - Statement by the employer noting anticipated growth of the occupation(s)
- The positive relationship of the training to the competitiveness of a participant and the employer.
- The relative wage and benefit levels of those employees (pre-training and anticipated upon completion of the training). Employees participating in Incumbent Worker Training activities must earn, or be eligible for a wage gain to earn, at least the hourly living-wage identified for the locality in which the business resides.
 - The living-wage for each locality can be found using the Massachusetts Institute of Training's Living Wage Calculator found here: <https://livingwage.mit.edu/>.
- The potential state, regional, and local economic impact, if any, of the training project.

Employee Eligibility

Because of the unique nature of the Incumbent Worker Training program, where the CVWDB evaluates the employers for eligibility consistent with §680.810, individuals receiving Incumbent Worker Training are not subject to the same eligibility criteria that apply to participants in the WIOA Title I Adult or Dislocated Worker programs, unless they are also receiving other services under those programs. Therefore, individuals who only receive Incumbent Worker Training services and no other WIOA Title I Adult and/or Dislocated Worker services, do not fall within the definitions of "participant" in 20 CFR §677.150(a). As such, those that are receiving only Incumbent Worker Training shall be reported as an "individual" and not a WIOA Title I program participant.

To report employees as individuals as stated above, the following eligibility must be documented on all employees participating in incumbent worker training:

- The employee is at least 18 years of age.
- The employee is a citizen of the United States or a non-citizen whose status permits employment in the United States.
- If the employee is a male born on or after January 1, 1960, verification of registration with the United States Selective Service system within 30 days after their 18th birthday or before they reach the age of 26.
- The employment meets the Fair Labor Standards Act requirements for employer-employee relations.
- The employee has an established employment history with the employer for six months or more.

- o In the event that the Incumbent Worker Training is being provided to a cohort of employees, not every employee in the cohort must have an established employment history with the employer for six months or more as long as the majority (51%) of those employees being trained, meet the employment history requirement.
- The employee is a paid, full-time employee who works at a facility located in Local Workforce Development Area (LWDA 7) or works for a staffing agency and is placed at a facility in LWDA 7.

Funding Parameters

Employers participating in the program are required to pay for the non-Federal share of the cost of providing the training to incumbent workers. The non-Federal share shall not be less than:

- 10 percent of the cost, for employers with not more than 50 employees;
- 25 percent of the cost, for employers with more than 50 employees, but not more than 100 employees, and;
- 50 percent of the cost, for employers with more than 100 employees.

The non-Federal share provided by an employer participating in an incumbent worker training project may include the amount of the wages paid by the employer to a worker while the worker is participating in the training activity. Incumbent Worker Training per program year (July 1 – June 30) may not exceed \$2,000 per employee and \$10,000 in total. Exceptions to these maximum amounts may be approved by review and approval of the Central Virginia Workforce Development Board, only if done PRIOR to obligation/authorization.

*Examples of costs that **are covered** by Incumbent Worker Training funds includes:*

- Training for participants for productive, high demand employment.
- Work-site-based learning strategies using cutting-edge technology & equipment.
- Training programs incorporating technological changes in the workplace.
- Training programs designed to impart employer-specified or industry specific skills.
- Train-the-trainer instruction to build the capacity of businesses to effectively respond to challenges of an increasingly diverse workforce.
- Consumable training materials & supplies.
- Textbooks.
- Off-site facility rental expense directly related to and necessary for the training.
- Rental of tools and equipment critical to the training.
- Travel expense and per diem of instructor.
- Instructor/trainer fees.

*Examples of costs that will **not be covered** by Incumbent Worker Training funds includes:*

- Costs incurred prior to the approval date of the application.
- Construction or purchase of facilities or buildings.
- Business relocation expenses.

- Employment or training in sectarian activities.
- Lobbying activities.
- Employee participant wages.

The CVWDB and any employer that receives funding for Incumbent Worker Training will follow all current and future guidance provided by state and federal agencies. Employers wishing to receive funding for Incumbent Worker Training must complete the CVWDB's Incumbent Worker Training Application and submit required documentation to CVWDB staff. The employer may select the training provider for Incumbent Worker Training, but if the employer requires assistance with identifying training providers, the CVWDB is able to assist in this manner.

CVWDB staff will review submitted and complete applications for adherence to federal, state, and local policies. CVWDB staff will also evaluate applications based on the availability of funding. If determined eligible for funding, CVWDB staff will work with the employer to obtain additional required information for documenting participating employees' eligibility. Applicable information and documentation will be entered and uploaded into the Virginia Workforce Connection (VaWC), as required by federal and state policy. Upon completion of training and/or reimbursement for training, the employer must submit documentation of expense and training to CVWDB staff for processing. Upon receipt of acceptable documentation, reimbursement payment will be processed for employer within 45 days of receipt of complete and accurate reimbursement request.



CENTRAL REGION

Title: Customized Training Policy	Related Forms:
Effective Date: 10/11/2022	Revised Date:

Purpose

This policy sets forth the parameters by which customized training may be structured and made available to WIOA Title I participants and employers as exceptions to the Individual Training Account process.

References

- PUBLIC LAW 113–128, Workforce Innovation and Opportunity Act
- 20 CFR 680.760
- VBWD Policy 401-04 Provision of Training Services
- VWL 16-06 Change 1 Eligible Training Provider Programs List

Procedure

Customized Training is training that is provided to an employer (including a group of employers) for a group of WIOA Title I enrolled participants by a qualified third-party training provider identified and contracted by the employer. The training must result in needed workplace skills specific to the employer's business and/or industry and the employer agrees to hire or retain participants upon successful completion of the training.

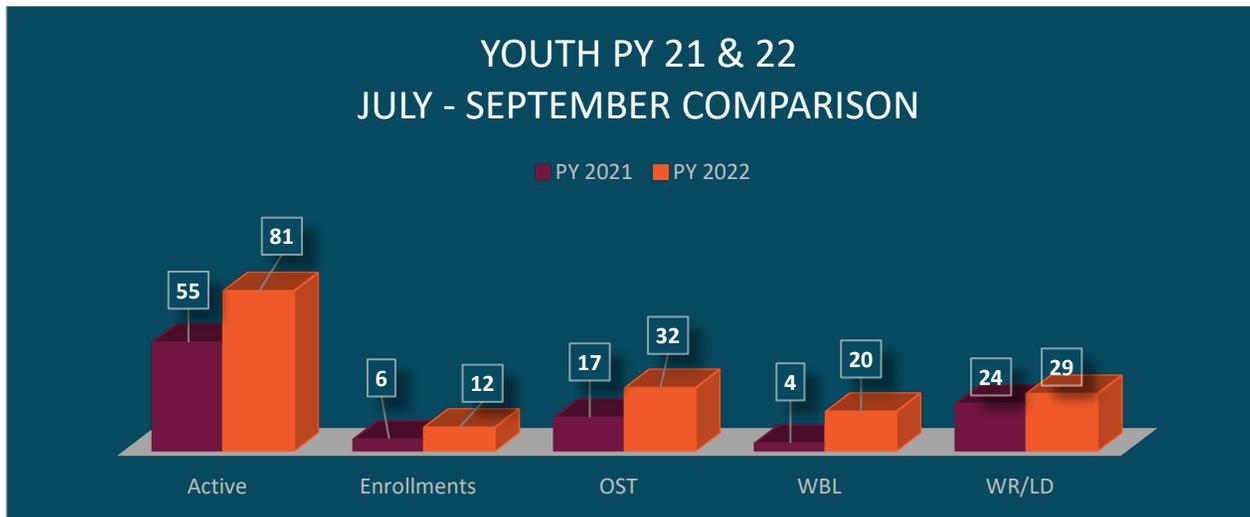
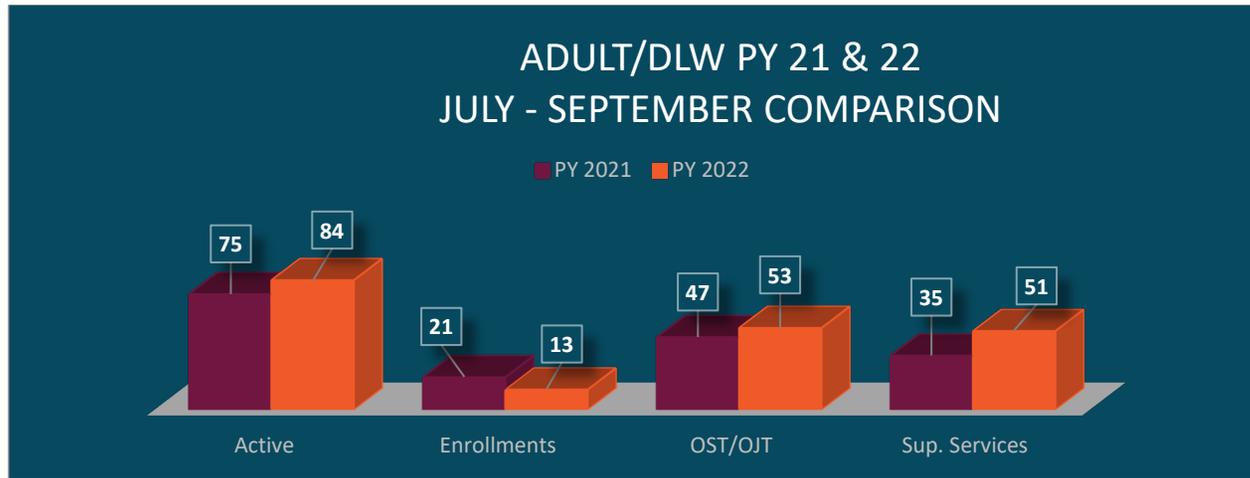
A Customized Training contract will provide reimbursement of up to 50% of the training cost. The training duration should be short term, not to exceed six (6) months, unless approved in advance by the Executive Director of the Central Virginia Workforce Development Board (CVWDB).

Customized Training contracts must meet the following requirements:

- The employer must have been in business for at least twelve (12) consecutive months immediately prior to contract, have at least two (2) employees other than the owner, and have all required licenses, certifications, and insurances.
- All training will be for occupations identified as "in demand" in the labor market and determined to be of priority by the Central Virginia Workforce Development Board (CVWDB) in the Local Plan. Staff may request a waiver for participants that are interested in training outside of the "in demand" target sectors and occupations if the need is well documented. Waivers must be requested, with all required documentation, and approved by the CVWDB Director prior to approving funding for the participant(s). Waiver documentation must include, at a minimum:
 - Justification within the participant's Individual Employment Plan (IEP) identifying occupation interest and/or aptitude.

- Barriers to employment and/or training in the target sectors and occupations; local labor market information as well as at least three different current job openings paying a self-sufficient wage relative to the training.
 - These items must be attached to the waiver request form to the CVWDB Director. Waivers may be available for no more than 5% of funds budgeted annually by line item and by program (i.e.: 5% of the Adult ITA budget, etc.).
- Customized Training is primarily intended for new employer hires; however, employed workers may be authorized at the discretion of CVWDB. Should Customized Training be provided to an employed worker(s), the worker(s) must not be earning a self-sufficient wage or wages comparable to or higher than wages from previous employment.
 - The employer must provide benefits and working conditions at the same level and to the same extent as other trainees or employees working a similar length of time and doing the same type of work.
 - The employer will not use Customized Training funded participants to displace any regular employee, or to replace any employee on layoff.
 - The employer must not have relocated from any location within the United States within one hundred and twenty (120) days, where the relocation resulted in any employee losing their job at the original location.
 - The employer must identify a third-party training provider for the delivery of Customized Training services. The training provider must have expertise in the training area to be delivered.
 - If the Executive Director of the CVWDB determines funding is low, preference will be given to training which results in the participant(s) earning an industry recognized credential.
 - The employer agrees to hire all participants who successfully complete Customized Training as new employees. In the case of current employees who may be authorized and successfully complete Customized Training, the employer agrees to retain them within the business with the possibility for upward mobility.
 - Positions authorized for Customized Training must be full-time and pay at least a wage meeting the definition of self-sufficient per the local Adult, Dislocated Worker and Youth Eligibility policy, unless otherwise agreed to by the CVWDB.
 - The training must relate to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy, or other appropriate purposes approved in advance by the Executive Director of the CVWDB.

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