



Bay Consortium Workforce Development Board, Inc.

Wednesday, November 4, 2020

11:00 am

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Draft Agenda
Bay Consortium Workforce Development Board, Inc.
Board Meeting
Wednesday, November 4, 2020

- I. Call to order
- II. Welcome and Introductions
- III. Roll Call
- IV. Approval of Minutes—August 5, 2020 Meeting
- V. Public Comment
- VI. Executive Committee Report
 - A. PY 20-21 Budget
 - B. Lease
 - C. Measurable Skills Gain Policy
 - D. Strategic Priorities
 - E. Eligible Training Providers
 - F. Local Plan
 - G. Request for Proposals
- VII. One-Stop Committee Report
 - A. Bay Consortium Workforce Development Area System Administrator Role and Responsibilities Policy
 - B. Case Management, Case Notes, and IEP/ISS Update and Review Policy
- VIII. P&A Committee Reports
 - A. Quarterly Reports
 - B. Corrective Action Plans
- IX. Labor Market Committee Report
 - A. Incumbent Worker Policy
 - B. Individual Training Account Policy
 - C. Unlikely to Return to Previous Occupation or Industry Policy
- X. Board Development Committee Report
- XI. Youth Council Report
 - A. WIOA Youth Incentive Policy
- XII. Old Business
- XIII. New Business
- XIV. Executive Director's Update
- XV. Public Comment
- XVI. Adjournment

Draft Board Minutes
Bay Consortium Workforce Development Board, Inc.
Wednesday, August 5, 2020
Zoom
11:00 a.m.

The Bay Consortium Workforce Development Board, Inc. met Wednesday, August 5, 2020 via Zoom.

Call to Order: Dennis Parsons, Chairman, called the meeting to order at 11:00 a.m. He also read the following statement:

Virginia law requires and authorizes regional bodies such as the Bay Consortium Workforce Development Board to conduct their meetings during a public disaster or emergency in manners which are consistent with providing continuity of government and operations in a safe and healthy manner, with the public safety, health and welfare in mind for all attendees/interested parties, in compliance with open government requirements.

The electronic convening of the Workforce Board's Board Meeting today has been determined necessary in order to continue the necessary business of the organization. We believe the matters included on the agenda address important/essential matters of continuing the work of Workforce Board and therefore it is appropriate to convene during this time.

Therefore, we have determined the appropriateness and eligibility to conduct today's meeting of the Board Meeting electronically pursuant to the provisions of Virginia Code § 2.2-3708.2 and related legislation approved by the General Assembly of Virginia, and in light of the Governor's March 12, 2020 State of Emergency Declaration for COVID-19.

Roll Call: Dennis Parsons requested the roll call with the following members recorded as present:

Jean Fraysse, Agreements-By-You
Steve Goodall, WestRock
Tracy Harrington, Department for Aging and Rehabilitative Services
Ken Knull, Yankee Point Marina
Marjorie Lampkin, Rappahannock Community College
Vanesa Livingstone, Department of Social Services
David Mann, Mann Printing
Rebecca Mann, Rappahannock Goodwill Industries
Martha O'Keefe, Germanna Community College
Danielle Robinson, Middle Peninsula Adult Education
Cherlanda Sidney-Ross, Department of Social Services
Deborah Warf, Virginia Employment Commission

The following members were represented by an alternate or proxy:

Scott Hall, Eastern Shore Community College, alternate to Patrick Tompkins

The following members were neither represented by an official alternate or proxy:

Louis Belcher, Middlesex County
Meg Bohmke, Stafford County Board of Supervisors
Melvin Carter, United Auto Workers Local 2123
Nikole Cox, Department of Social Services
Josh Gemerek, Bay Aging
Bridgett Landess, Union First Market Bank
Bill Leyden, Elevator Constructors Local 52
Greg Moon, Carry-On Trailer
Jason Perry, Rappahannock Community College
Kelvin Pettit, Accomack-Northampton Electric Co-Op
Percy Pollard, Pollard Consulting Services
Leigh Ramos, Haskins Bayside Super Service Center, Inc.
Chantel Roane, Haynesville Correctional Center

A quorum was present.

Others present were: Jackie Davis and Katlyn Moss.

Approval of Minutes: A motion was made to approve the June 3, 2020 minutes. The motion was seconded and carried by a unanimous vote.

Public Comment: There was no public comment.

Executive Committee: Dennis Parsons gave the committee update. He discussed the new committee assignments. He stated that he would bring a formal lease suggestion to the next Executive Committee and Board meetings. Jackie Davis reviewed the PY 20-21 Budget with members. Jean Fraysse asked about increases for employee salaries. A motion was brought to the Board from the Executive Committee to approve the PY 20-21, which was seconded and approved, with Marjorie Lampkin abstaining. Jackie Davis discussed MD Tech, an Eligible Training Provider, and that their status was being reviewed. She also discussed Cardinal Institute of Health, another Eligible Training Provider, who was currently unwilling to provide full refunds for classes canceled.

One Stop Committee: Deborah Warf gave the committee update. She reviewed the Work Experience Procedure Policy. She noted that the changes were made as a result of monitoring. Changes include replacing “wages” with “stipend” and defining who would complete the learning plan. She reviewed the Youth Incentive Policy, noting that the changes were made as a result of monitoring. The wording “up to” was removed from the rewards to make them definitive and equal across the Workforce Development Area. She discussed the Self Sufficiency Policy with members, noting that the only change was the update with 2020 numbers. She reviewed the Trade Adjustment ACT and WIOA Dislocated Worker Co-Enrollment Policy with members, noting that wording that instructed non WIOA staff had been removed, and added that if a client is issued a waiver that an assessment must be done. A motion was brought to the Board to approve the Work Experience Procedure Policy, Youth Incentive Policy, Self Sufficiency Policy, and Trade Adjustment ACT and WIOA Dislocated Worker Co-Enrollment Policy, which was seconded and approved.

Labor Market Committee: Martha O’Keefe gave the committee update due to Melvin Carter having poor reception. She noted that there had not been a quorum. She stated that they had discussed the Board Manual, Strategic Priorities, and committee membership.

Performance and Accountability: Steve Goodall gave the committee report. He stated that a quorum was not present. He reviewed over the quarterly reports, noting the enrollment numbers were a result of locations closing due to COVID. He also noted that providers had developed plans to insert themselves better into underserved areas.

Board Development: Jackie Davis gave the committee update. She noted that there had not been a quorum, but they had reviewed the Board Manual and their Strategic Priorities.

Youth Council: Marjorie Lampkin gave the committee update. She noted that a quorum was present. She reviewed the Quarterly Reports, noting the enrollment numbers were a result of locations closing due to COVID. She also reviewed the Work Experience Procedure Policy and Youth Incentive Policy.

Old Business: There was no old business.

New Business: There was no new business.

Executive Director’s Update: Jackie Davis let members know that the Virginia Career Works Fredericksburg Center was open by appointment only and that she was working with the Virginia Community College System for a Dislocated Worker Grant for CNA’s to be placed for temperature checks. She also noted that she had an upcoming presentation with Stafford Board of Supervisions.

Other Items for Discussion: There were no other items from discussion.

Public Comment: There was no public comment.

There being no further business, Dennis Parsons called the meeting to end at 11:30 A.M.

Respectfully submitted,
Katlyn Moss

**Executive Committee Meeting
Draft Minutes
Wednesday, October 28, 2020
11:00 A.M.**

The Executive Committee met Wednesday, October 28, 2020, via Zoom.

Call to Order: Dennis Parsons called the meeting to order at 11:00 a.m.

Roll Call: Present were Ken Knull, Debbye Warf, Marjorie Lampkin, Jean Fraysse, and Josh Gemerek. Not present was Steve Goodall and Percy Pollard. Others present were Jackie Davis, Steven Golas, and Katlyn Moss, Bay WDB Staff.

Approval of Minutes: A motion was made to approve the Executive Committee meeting minutes from the July 29, 2020 meeting. The motion was seconded and carried by a unanimous vote.

Public Input: There was no public input.

One-Stop Committee: Debbye Warf gave the committee update. She reviewed the Bay Consortium Workforce Development Area System Administrator Role and Responsibilities Policy and the Case Management, Case Notes, and IEP/ISS Update and Review Policy with members. She also noted that a part time Center Guide position had been hired for the Virginia Career Works Fredericksburg Center.

Performance & Accountability Committee: Jackie Davis gave the committee report. She reviewed the Quarterly Reports, noting that Eastern Shore Community College was not meeting their 40% Minimum Training Expenditure Requirement and they would receive a letter requesting a Corrective Action Plan and that Rappahannock Community College had not enrolled any new Youth clients on the Middle Peninsula this quarter, as well as not currently serving any clients from King and Queen County, King William County, Mathews County, and Middlesex County. She noted that they had submitted Corrective Action Plans to Steven Golas and he had reviewed and approved them.

Labor Market Committee: Jean Fraysse gave the committee update. She reviewed the Incumbent Worker Policy with members.

Board Development Committee: Jackie Davis gave the committee update. She noted that she had reviewed Board membership, potential new Board members, and their Strategic Priorities.

Youth Council: Jackie Davis gave the committee update. She reviewed the Youth Incentive Policy with members.

Old Business: Jackie Davis reviewed the PY 2020-2021 Proposed Budget with members. She noted the addition of funding for the GoVA Workforce Study and the Wagner-Peyser Title III – Walkin. The Wagner-Peyser Title III – Walkin funding is for the addition of the part time Center Guide position for the Virginia Career Works Fredericksburg Center. Jean Fraysse asked if the

position had already been fulfilled, Jackie Davis responded yes. Jean Fraysse asked if the employee was a former participant of one of the WIOA programs. Jackie Davis stated no, she was previously in the hotel industry. A motion was made to approve the PY 2020-2021 Proposed Budget, which was seconded and approved with Marjorie Lampkin abstaining. Dennis Parsons gave an update on the Fredericksburg lease. He noted that he had received a last minute proposal and wanted to take the proper amount of time to review it. He mentioned that there would most likely be a special Board meeting held to approve the lease as a decision was needed before the current lease end of May 1, 2021. Ken Knull asked if the new proposal was associated with any providers, Dennis Parsons responded no.

New Business: Jackie Davis reviewed the Measurable Skills Gain Policy with members, stating that it was a new policy from the State regarding the Measurable Skills Gain in the Quarterly Reports. A motion was made to send the Measurable Skills Gain Policy to the Board for approval, which was seconded and approved. Jackie Davis stated that the State wanted a new Local Plan from the BCWDB by Spring 2021. They had allocated funds for a new Strategic Plan to be completed. Dennis Parsons noted that Northern Virginia had procured Lori Strumpf and the BCWDB had used the same procurement. Dennis Parsons asked if Josh Gemerek, Ken Knull, Jean Fraysse, and Steve Goodall would like to be members of the Local Plan Steering Committee. Josh Gemerek, Ken Knull, and Jean Fraysse agreed, Steve Goodall would be asked later. Dennis Parsons stressed the need for funds that aren't WIOA. Jackie Davis reviewed the Strategic Priorities with members with the updated quantifying objectives. Jackie Davis reviewed the Request for Proposals (RFPs) with members, noting that the plan was to release the RFPs earlier to ease the transition if a change in providers occurs. Steven Golas discussed the funding available for a One-Stop Manager at \$10,000. Jean Fraysse asked if \$10,000 would be a deterrent for anyone applying, Jackie Davis responded that it possibly might. Ken Knull asked about the advantage of offering \$50,000. Jackie Davis stated that the current One-Stop Manager RFP was written so the One-Stop Manager only covers Planning District 16, increasing the funding to \$50,000 could allow the One-Stop Manager to cover the entire Bay Consortium Workforce Development Area. Jean Fraysse asked if the One-Stop Manager is currently a full time position, Jackie Davis responded it is. Jean Fraysse asked if the funding would stay consistent throughout the contract or renegotiated every year, Steven Golas stated it would be renegotiated yearly. Jean Fraysse asked how many applicants previously applied for the One-Stop Manager RFP, Jackie Davis stated with the last RFPs, the One-Stop Manager had two applicants. Members agreed to raise the funding to \$45,000 with coverage for the entire Bay Consortium Workforce Development Area. A discussion was held on the various ways of accepting RFPs. A motion was made to send the RFPs to the Board for approval with the changes made to the One-Stop Operator RFP, which was seconded and approved.

Executive Director Update: Jackie Davis let members know that she had been working with Fredericksburg and the Eastern Shore providing support. She also mentioned that she was still reaching out to the CLEOs.

Other Items for Discussion: Jackie Davis let members know that the Board meeting would take place on November 4, 2020 at 11 a.m. via Zoom.

Public Input: There was no public input.

There being no further business, the meeting was adjourned at 12:15 p.m.

Respectfully submitted,
Katlyn Moss

Bay Consortium Workforce Development Board, Inc.

PY 2020-2021 Proposed Budget

Revenue	Total PY 20-21	Amendment 10-20	Total PY20-21
WIOA Admin	\$ 136,186.78		\$ 136,186.78
WIOA Adult	\$ 456,270.31		\$ 456,270.31
WIOA Dislocated	\$ 480,439.30		\$ 480,439.30
WIOA Youth	\$ 465,784.42		\$ 465,784.42
Economic Equity Initiative	\$ 113,376.94		\$ 113,376.94
Management Fee (One-Stop)	\$ 6,214.91		\$ 6,214.91
Rapid Response IWT	\$ -		\$ -
RR Business Support Initiative	\$ 30,804.54		\$ 30,804.54
Wagner Peyser Title III	\$ 263,678.44		\$ 263,678.44
VCW Reopening	\$ 52,926.29		\$ 52,926.29
GOVA - Workforce Study	\$ -	\$ 62,500.00	\$ 62,500.00
Wagner Peyser Title III - Walkin	\$ -	\$ 25,000.00	\$ 25,000.00
Total Revenue	\$ 2,005,681.93	\$ 87,500.00	\$ 2,093,181.93
Expenses	Approved PY20-21	Amendment 10-20	Total Proposed PY20-21
Board			
Advertising	\$ 500.00		\$ 500.00
Audit	\$ 16,700.00		\$ 16,700.00
Dues/Publications	\$ 500.00		\$ 500.00
Employee Salaries	\$ 193,744.66		\$ 193,744.66
Employee Benefits	\$ 58,123.40		\$ 58,123.40
Employee Taxes	\$ 17,921.38		\$ 17,921.38
Equip. Purchase	\$ 1,500.00		\$ 1,500.00
Equip. Rental	\$ 4,000.00		\$ 4,000.00
Equip. Repair	\$ 750.00		\$ 750.00
Insurance	\$ 7,000.00		\$ 7,000.00
Office Rent	\$ 10,000.00		\$ 10,000.00
Office Supplies	\$ 2,000.00		\$ 2,000.00
Postage	\$ 500.00		\$ 500.00
Printing	\$ 500.00		\$ 500.00
Telephone/Communications	\$ 6,700.00		\$ 6,700.00
Professional Fees/PT Staff	\$ 2,000.00		\$ 2,000.00
Professional Development	\$ 5,000.00		\$ 5,000.00
Staff Travel	\$ 15,500.00		\$ 15,500.00
Board/CLEO Travel	\$ 13,500.00		\$ 13,500.00
Board Total	\$ 356,439.44	\$ -	\$ 356,439.44
Programs	Approved PY20-21	Amendment 10-20	Total Proposed PY20-21
SUB AREA 16 Adult/Dislocated	\$ 220,952.69		\$ 220,952.69
SUB AREA 17 and 18 Adult/Dislocated*	\$ 293,233.60		\$ 293,233.60
SUB AREA 22 Adult/Dislocated	\$ 207,936.83		\$ 207,936.83
SUB AREA 16 YOUTH	\$ 95,773.10		\$ 95,773.10
SUB AREA 17 and 18 YOUTH*	\$ 145,708.29		\$ 145,708.29
SUB AREA 22 YOUTH	\$ 116,389.36		\$ 116,389.36
INCUMBENT WORKER TRAINING	\$ 10,000.00		\$ 10,000.00
One-Stop Operator	\$ 50,000.00		\$ 50,000.00
ECONOMIC EQUITY INITIATIVE	\$ 103,996.88		\$ 103,996.88
RAPID RESPONSE IWT	\$ -		\$ -
RR Business Support Initiative	\$ 30,804.54		\$ 30,804.54
Wagner Peyser Title III	\$ 263,678.44		\$ 263,678.44
VCW Reopening	\$ 52,926.29		\$ 52,926.29
GOVA - Workforce Study	\$ -	\$ 62,500.00	\$ 62,500.00
Wagner Peyser Title III - Walkin	\$ -	\$ 25,000.00	\$ 25,000.00
Programs Total	\$ 1,591,400.02	\$ 87,500.00	\$ 1,678,900.02
Expense Total	\$ 1,947,839.46		\$ 2,035,339.46
Unobligated Reserve	\$ 57,842.47	\$ -	\$ 57,842.47
Total	\$ 2,005,681.93	\$ -	\$ 2,093,181.93
Date Board Approval			
Date CLEO Approval			

Bay Consortium Workforce Development Board

Policy Number: 20-06
Effective Date: November 4, 2020
Revised Date: -
Title: Measurable Skills Gain Policy

PURPOSE

To provide the Bay Consortium Workforce Development Board (BCWDB), and their service providers that receive Title I funds to serve adults, dislocated workers, and youth, with the requirements associated with the WIOA Title I Measurable Skill Gains performance indicator.

REFERENCES

- Workforce Innovation and Opportunity Act (WIOA) Section 116 – Performance Accountability System;
- Workforce Innovation and Opportunity Act (WIOA) Section 169 – Evaluation and Research;
- Workforce Innovation and Opportunity Act (WIOA) Section 185 – Reports, Recordkeeping, and Investigations;
- Workforce Innovation and Opportunity Act (WIOA) Section 189 – Secretarial administrative authorities and responsibilities;
- 20 CFR 677 – Performance Accountability under Title I of the Workforce Innovation and Opportunity Act; Subpart C – 20 CFR 683 – Reporting Requirements;
- OMB Control Number 1205-0526 – WIOA Participant Individual Record Layout (PIRL);
- OMB Control Number 1205-0521 – WIOA DOL-only Participant Individual Record Layout (PIRL);
- Training and Employment Guidance Letter – WIOA No. 10-16, Change 1 – Performance Accountability for Core WIOA Programs;
- Training and Employment Guidance Letter – WIOA No. 19-16 – Guidance for Services to Adults and Dislocated Workers;
- Training and Employment Guidance Letter – WIOA No. 21-16 – Third WIOA Title I Youth Formula Program Guidance;
- Training and Employment Guidance Letter – WIOA No. 26-16 – Guidance on Supplemental Wage Information;
- Training and Employment Notice No. 08-16 - Implementation of an Integrated Performance Reporting System for Multiple Employment and Training Administration (ETA) and Veterans' Employment and Training Service (VETS) Administered Programs.

DEFINITIONS

Measurable Skill Gains

This indicator is the percentage of participants who, during a program year, are in education or training programs that lead to a recognized post-secondary credential or employment and who are achieving measurable skill gains which is defined as documented academic, technical, occupational, or other forms of progress, towards such a credential or employment. Measurable skill gains indicator measures progress and is not exit-based.

Participant

Adult and Dislocated Worker Program

For the WIOA Title I Adult and Dislocated Worker programs, a participant is a reportable individual who has received services other than the services described in 20 CFR 677.150 (a)(3). The individual must satisfy all applicable programmatic requirements related to eligibility determination.

As set forth in more detail in section 677.150, the following individuals are not participants:

- Individuals in an Adult Education and Family Literacy Act (AEFLA) program who have not completed at least 12 contact hours;
- Individuals who only use the self-service system; and
- Individuals who receive information-only services or activities, which provides readily available information that does not require an assessment by a staff member of the individual's skills, education or career objectives.

Youth Program

For the WIOA Title I Youth program, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, the development of an individual service strategy, and received one of the 14 WIOA program elements:

14 PROGRAM ELEMENTS

In order to support the attainment of a secondary school diploma or its recognized equivalent, entry into postsecondary education, and career readiness for participants, the programs described shall provide elements consisting of:

- tutoring, study skills training, instruction, evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential;

- alternative secondary school services, or dropout recovery services, as appropriate;
- paid and unpaid work experiences that have as a component academic and occupational education, which may include:
 - (I) summer employment opportunities and other employment opportunities available throughout the school year;
 - (II) pre-apprenticeship programs;
 - (III) internships and job shadowing; and
 - (IV) on-the-job training opportunities;
- occupational skill training, which shall include priority consideration for training programs that lead to recognized postsecondary credentials that are aligned with in-demand industry sectors or occupations in the local area involved, if the Bay Consortium Workforce Development Board determines that the programs meet the quality criteria described in section 123;
- education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- leadership development opportunities, which may include community service and peer-centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate;
- supportive services;
- adult mentoring for the period of participation and a subsequent period for a total of not less than 12 months;
- follow-up services, for not less than 12 months after the completion of participation, as appropriate;
- comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate;
- financial literacy education;
- entrepreneurial skills training;
- services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- activities that help youth prepare for and transition to postsecondary education and training.

Reporting Period

For purposes of this policy, the reporting period is a Program Year (July 1 to June 30).

BACKGROUND

The measurable skill gains indicator is used to measure interim progress of participants who are enrolled in education or training services for a specific reporting period. Therefore, it is not an exit-based measure. Instead it is intended to capture important progressions through pathways that offer different services based on program purposes and participant needs, and can help fulfill the vision for a workforce system that serves a diverse set of individuals with a range of services tailored to individual needs and goals. Depending upon the type of education or training program in which a participant is enrolled, documented progress is defined as one of the following in TEGL 10-16 Change 1:

- Documented achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary education level;
- Documented attainment of a secondary school diploma or its recognized equivalent;
- Secondary or postsecondary transcript or report card for a sufficient number of credit hours that shows a participant is meeting the state unit's academic standards;
- Satisfactory or better progress report, towards established milestones, such as completion of On-the-Job Training (OJT) or completion of one year of an apprenticeship program or similar milestones, from an employer or training provider who is providing training; or
- Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams.

GUIDANCE

Measurable Skill Gains are one of the WIOA Title I performance indicators. There are a number of different approaches to measuring the skill gains of an adult, dislocated worker, or youth participant.

See the following options.

Documenting Progress for Types of Measurable Skill Gains

1. Documented achievement of at least one educational functioning level of a participant who is receiving instruction below the postsecondary level – Programs may measure educational functioning level based on one of the following three criteria:
 - States may compare the participant’s initial education functioning level, as measured by a pre-test, with the participant’s current educational functioning level, as measured by a posttest. Note: The approved pre- and post-tests must be selected from the list of tests the Secretary of Education determines to be suitable for use in the National Reporting System for Adult Education.

States that offer adult high school programs that lead to a secondary school diploma or its recognized equivalent, may measure and report educational gain through the awarding of credits or Carnegie units; or
 - States may report an education functioning level gain for participants who exit an education or training program below the postsecondary level and enroll in postsecondary education and training during the program year. A program below the postsecondary level applies to participants enrolled in a basic education program.
2. Documented attainment of a secondary school diploma or its recognized equivalent – Programs may document attainment of a secondary school diploma, or its recognized equivalent, if the participant obtains certification of attaining passing scores on all parts of a state-recognized high school equivalency test, or the completion of secondary studies, or an alternate diploma, including a high school or adult secondary school diploma.
3. Secondary or postsecondary transcript or report card for a sufficient number of credit hours that shows a participant is meeting the state unit’s academic standards – For secondary education, this gain may be documented through receipt of a secondary transcript or report card for one semester showing that the participant is achieving the state unit’s policies for academic standards. For postsecondary education, this gain must demonstrate a sufficient number of credit hours – which is at least 12 hours per semester or, for part-time students, a total of at least 12 hours over the course of two completed consecutive semesters during the program year – that shows a participant is achieving the state unit’s academic standards (or the equivalent for other than credit hour programs).

*Please note that clinicals or practicums that do not provide traditional academic credits, but are considered as a component of counting towards an institution’s definition of a full- or part-time student, should be followed. EX: if a student is taking 9 credit hours of classes and is taking a practicum that is considered by the institution towards the student’s full-time status, then it should be counted the same towards their full-time status for the purposes of measurable skills gains.
4. Satisfactory or better progress report, towards established milestones, such as completion of OJT or completion of year of an apprenticeship program or similar milestones, from an

employer or training provider who is providing training – Documentation for this gain may vary and programs should identify skills gains as appropriate, based upon the nature of services being provided, but progress reports must document substantive skill development that the participant has achieved. The gain may be documented by a satisfactory or better progress report from an employer or training provider. Progress reports may include training reports on milestones completed as the individual masters the required job skills, or steps to complete an OJT or apprenticeship program. Increases in pay resulting from newly acquired skills or increased performance also can be used to document progress.

5. Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams – Documentation for this gain may include passage of a component exam in a Registered Apprenticeship program, employer-required knowledge-based exam, satisfactory attainment of an element on an industry or occupational competency-based assessment, or other completion test necessary to obtain a credential.

Calculation Methodology

Calculation includes the following participants:

The number of program participants during this reporting period who are in an education or training program that leads to a recognized secondary or postsecondary credential or employment and are achieving a measurable skill gain based on attainment of at least one type of gain, **DIVIDED** by the number of participants during the reporting period who are in an education or training program that leads to a recognized secondary or postsecondary credential or employment.

Participants who, during any point in the program year, are in an education or training program that leads to a recognized secondary or postsecondary credential or employment are included in the **denominator**. This includes participants who continue to receive services as well as those who have participated during the reporting period and have exited the program. Data for the

denominator in this calculation is drawn from PIRL 1811: Date Enrolled During Program Participation in an Education or Training Program Leading to a Recognized Credential or Employment.

The **numerator** is the number of program participants defined above who achieved at least one type of gain. A participant may have achieved more than one type of gain in a reporting period; however, only one gain per participant in a reporting period may be used to calculate success on the measurable skill gains indicator.

Operational Parameters

All participants who, during a program year, are in an education or training program that leads

to a recognized secondary or postsecondary credential or employment are counted in the calculation of this measure. Participants who exit for any of the reasons listed below are excluded from the measurable skill gains indicator:

- Institutionalized
- Health/Medical
- Deceased
- National Guard/Reservists called to active duty
- Foster Care

The following participants in education and training programs are included:

- Title I Adult and Dislocated Worker – All participants who are in a Title I Adult or Dislocated Worker-funded training program are included in the measurable skills gains indicator (which includes funding a training program for a secondary school program equivalent). This includes all participants in work-based training.
- Title I Youth – All In-School Youth are included in the measurable skill gains indicator since they are attending secondary or postsecondary school. Only Out-of-School Youth who are in one of the following are included in the indicator:
 - the program element occupational skills training
 - secondary education during participation in the Title I Youth program
 - postsecondary education during participation in the Title I Youth program
 - Title II-funded adult education during participation in the Title I Youth program
 - The YouthBuild program during participation n in the Title I Youth program
 - Job Corps during participation in the Title I Youth program

Additional Operational Parameters

- Participants are only included in the denominator one time per reporting period (i.e., program year), regardless of how many skill gains they achieve in a given program year unless the individual has more than one period of participation in a given reporting period (i.e., program year), regardless of how many skill gains they achieve in a given program year unless the individual has more than one period of participation in a given program year;
- A participant who exits from the program and re-enrolls in the program during the same program year and is in an education or training program will be in the indicator two times for that particular program year;
- The measurable skill gains indicator is different from the other indicators because it is **not** exit-based, meaning that a participant can achieve a measurable skill gain while still participating in a program; and

- Programs should not delay enrollment or services to participants until a new program year even if programs believe there is insufficient time for the participant to make any type of measurable skill gain by the end of that program year.

For performance accountability purposes, the measurable skill gains indicator calculated the number of participants who attain at least one type of gain during each period of participation within a given program year. Since this indicator is not exit-based, each unique program entry date (not exit date) triggers inclusion in the calculation. Participants will achieve a successful outcome if they attain one type of gain applicable to the core programs.

All skills gains shall be recorded as they occur and must be documented.

ACTION REQUIRED

All participants enrolled in an education or training program that leads to a recognized secondary or postsecondary credential or employment should have their progress assessed using the documentation and measurements as specified above.

Data Entry Requirements for Measurable Skill Gains in the Virginia Workforce Connection (VaWC)

The Measurable Skill Gain indicator requires that the WIOA Title I Adult, Dislocated Worker, or Youth participant:

- Must be a WIOA Title I program participant.
- Must be enrolled in an education or training program that leads to a recognized secondary or postsecondary credential or employment.
- Only one Measurable Skill Gains will be reported during a reporting period (Program Year), regardless of how many a participant attains during that reporting period.

- All Measurable Skill Gains must be documented (using the appropriate documentation sources as outlined in the Documenting Progress for Types of Measurable Skill Gains section of this document).
- If a participant has multiple periods of participation during a reporting period, the measurable skills gain will be counted in each period of participation.

Strategic Priorities

Strategic Priority Number One: Funding – Performance and Accountability

Goal: Maximize funding opportunities to support strategic priorities

Objectives:

1. Diversify streams of revenue to support the strategic priorities
 - a. Grant opportunities
 - i. Wrote and received Economic Equity Imitative Grant and Rapid Response IWT Training Grant. Received additional funding through the Governor's office for GOVA partnered funding for a workforce study for the Northern Neck and Middle Peninsula, received additional funding from partner to fund a critical staff position missing from the VCW Fredericksburg. Waiting on response to NDWG submitted to the state and additional funding to support facilitator for strategic planning to produce local plan.
 2. Support professional grant writing to supplement existing revenue
 - a. What efforts have been done to support grant writing
 - i. Staff has grant writing course through ESCC.
 3. Monitor funds for correlation with goals
 - a. Monthly reports for VCCS
 - i. Provide Monthly Expenditure Reports to VCCS monthly. Review data to ensure over expenditures do not happen throughout the month.
 4. Evaluation – Review Quarterly reports, annual budgets, and grant revenue
 - a. Quarterly Reports for all funding streams to include budgets and goal monitoring
 - i. Reports provided to the Board to include funding amount, funding spent, and performance metrics.

Strategic Priority Number Two: Program Development and Implementation – One Stop

Goal: Lead workforce system of partners to provide comprehensive programs and services

Objectives:

1. Provide responsive and innovative employer services
 - a. Number of employers reached
 - ii. See Quarterly Reports, Quarterly Business Service Report provided to the State [Business Services Report Quarter 1](#)
 - b. Service provided to employers
 - i. See Quarterly Reports, Quarterly Business Service Report provided to the State [Business Services Report Quarter 1](#)

2. Provide responsive and innovative training and support services for jobseekers
 - a. Number of jobseekers reached
 - i. See Quarterly Reports
 - b. Services provided to job seekers
 - i. Resume writing workshops, job fairs, job search, labor market information, general workshops,
3. Ensure WIOA compliance through technical assistance, tracking and documentation
 - a. Technical Assistance provided
 - i. Who provided the assistance
 1. Program Specialist provides monthly technical assistance meetings with all providers. If a need arises throughout the month the Program Specialist addresses the need at that time.
 2. Executive Director has been providing reopening support to both VCW Fredericksburg and Eastern Shore.
 - ii. Who received the assistance
 1. RGI, SSG, RCC, and ESCC Title I Case Management Staff
4. Evaluation – Review quantity and quality of services provided to job seekers and employers
 - a. Job Seeker/Employer Satisfaction reports
 - i. Provided in the Quarterly reports

Strategic Priority Number Three: Business and Community Engagement –Board Development

Goal: Enhance outreach and connectivity to business and community partners

Objectives:

1. Enhance connections with regional employers through ongoing outreach and resource promotion
 - a. Number of employers reached
 - i. [Business Services Report Quarter 1](#)
 - b. Marketing – flyers, emails, newsletter
 - i. BCWDB has provided a newsletter beginning July 2020, we email all partners, Board members, and LEOs
 - c. Hire a Business Service Representative
 - i. How to fund this position for LWDA 13 – option LWDB provide funding or seek funding elsewhere
2. Enhance communication and collaboration with local elected officials
 - a. Board of supervisors meeting
 - i. June 24, 2019 King and Queen BOS
 - ii. 2020 King William County BOS
 - iii. September 2020 Stafford County BOS
 - b. Meetings with LEO/County Admin.

- i. Meeting with LEO/Admin
 - 1. February 28, 2020 Accomack and Northampton Counties Co Admin.
 - 2. March 6, 2019 Westmoreland County Co Admin.
 - 3. March 7, 2019 Stafford County Information Officer
 - 4. June 5, 2019 Richmond, Lancaster and Northumberland County Admn.
 - 5. June 12, 2019 Caroline County Admin. Econ. Dev.
 - 6. June 18, 2019 Essex, Middlesex, King William, and King & Queen County Admin.
 - 7. September 6, 2019 Meet with Middle Peninsula County Admin (Essex, Middlesex, King William, King and Queen and Matthews – Gloucester County was there as well)
- ii. Provide CLEOs with resources available in area through webinars – joint meeting of Board
 - 1. There is a joint meeting with the Board.
- iii. Share success stories with CLEOs
 - 1. Provided the Performance Measures at meetings which are now quarterly instead of twice a year to coincide with the Board meetings.
- c. Provide Staff, Board and CLEOs with common talking points when in the community.
- 3. Coordinate and collaborate with community partners to promote and align resources of all stakeholders without duplicating services
 - a. Stakeholder visits/projects/partner meetings
 - i. Monthly partner meetings for VCW Fredericksburg
 - ii. Monthly NN/MP Business Services Meetings
 - iii. Over the last year have meet with all LDSS offices
 - iv. Various Resource Councils and chamber of commerce
- 4. Evaluation – Track business and community outreach by WDB members and staff
 - a. What business community outreach are WDB members engaged with
 - i. Send poll to WDB members for response
 - b. Number of business/community engagement projects
 - i. What type of engagement
 - 1. Only received a handful of responses from WDB members

Strategic Priority Number Four: Marketing – Labor Market

Goal: Enhance visibility and viability of WDB as an important key community resource

Objectives:

1. Align WDB marketing activities with VA Career Works initiative to support strategic priorities
 - a. Our mission is to advance economic stability and growth by preparing and connecting people who want to work with employers who need to hire through its training providers and network of professional partners. Virginia Career Works is Virginia's vital link between meaningful employment and growing businesses, changing lives; and advancing economic prosperity.
 - i. **Create common message**
2. Pursue sponsorships and partnerships to support program initiatives
 - a. List sponsorships and partnerships
 - i. **Partnerships include, community based organization, LDSS, VEC, DARS, Adult Education, Community Colleges, Melwood, Telamon,**
3. Build rapport with industry and business community through ongoing needs assessment, resource promotion, and service enhancement
4. Evaluation – Institute feedback methods to capture community opinion and usage of workforce services
 - a. Customer Satisfaction Survey – paper
 - i. **See Quarterly Reports**
 - b. Business Satisfaction Survey – online
 - i. **Supported by Commonwealth of VA – we do not have access.**

Bay Consortium Workforce Development Board, Inc.

**One-Stop Committee Meeting
Draft Minutes
Tuesday, October 13, 2020
10:00 a.m.**

The One-Stop Committee met Tuesday, October 13, 2020 via Zoom.

Call to Order: Debbye Warf called the committee meeting to order at 10:00 a.m.

Roll Call: Present were Debbye Warf, Martha O’Keefe, Nikole Cox, and Tracy Harrington. Not present was Rebecca Mann. In addition, present was Jackie Davis, Steven Golas, and Katlyn Moss, WDB Staff. A quorum was present.

Public Input: There was no public input.

Approval of Minutes: There was a motion to approve the July 14, 2020 minutes. The motion was seconded and approved.

New Business: Steven Golas reviewed the Bay Consortium Workforce Development Area System Administrator Role and Responsibilities Policy with members. He noted that it was a new policy and mirrored the state policy. A motion was made to approve the Bay Consortium Workforce Development Area System Administrator Role and Responsibilities Policy and send to the Board for approval, which was seconded and approved. Steven Golas reviewed the Case Management, Case Notes, and IEP/ISS Update and Review Policy with members. He noted that it was updated to reflect that case management files would be moving to electronic on December 1, 2020. A motion was made to approve the Case Management, Case Notes, and IEP/ISS Update and Review Policy and send to the Board for approval, which was seconded and approved. Jackie Davis also discussed Chair and Vice Chair nominations with members. Debbye Warf was elected Chair and Tracy Harrington was nominated as Vice-Chair.

Old Business: Jackie Davis reviewed the updated strategic priorities with members and asked for feedback.

Other Items for Discussion: Jackie Davis let members know that the Strategic Plan will be redo in the near future. She also noted that a part-time Center Guide position was created.

There being no further business, the meeting was adjourned at 10:25 a.m.

Respectfully submitted,

Katlyn Moss

Bay Consortium Workforce Development Board

Policy Number: 20-07

Effective Date: November 4, 2020

Revised Date: -

Title: Bay Consortium Workforce Development Area System Administrator Role and Responsibilities Policy

PURPOSE

This policy has been developed to provide the Bay Consortium Workforce Development Area (BCWDA) and their service providers with guidance regarding the use of Virginia Workforce Connection (VaWC) and the role of the System Administrator. This document provides guidance for maintaining correct and accurate data within the VaWC as well as providing the appropriate staff access to the VaWC.

REFERENCES

- Public Law (Pub. L) 113-128 Workforce Innovation and Opportunity Act (WIOA) of 2014
- 20 Code of Federal Regulations (CFR), WIOA Final Rules and Regulations
- U.S. Department of Labor (USDOL) Training and Employment Guidance Letter (TEGL) 10-16, Change 1 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs
- U.S. Department of Labor (USDOL) Training and Employment Guidance Letter (TEGL) 39-11, Guidance on the Handling and Protection of Personally Identifiable Information (PII)
- E-Government Act of 2002
- Government Paperwork Elimination Act of 1998
- Paperwork Reduction Act of 1995
- VWL 20-04: VaWC WIOA Title I Data Change Requests

DEFINITIONS

Virginia Workforce Connection (VaWC)

VaWC is the management system of record used for all data collection and reporting in Virginia.

BACKGROUND

The VaWC is the system of record for the Workforce Innovation and Opportunity Act (WIOA) Title I Programs and Services in the Commonwealth of Virginia, therefore, it is important that system security and data integrity is maintained.

Only authorized users should be granted access to the VaWC. Users are limited to specific roles and levels of access privilege. System access control is achieved through user IDs that are unique to each individual user and which provide individual accountability. Staff are prohibited from sharing or distributing their assigned VaWC system login or password information.

WIOA State System Administration

State System Administrative functions shall be maintained through the Virginia Community Colleges System (VCCS) office in Richmond, Virginia. Only the State System Administrators have access to create new WIOA staff users in the system. The State System Administrators serve as the point of contact for VaWC questions and issues. The State System Administrators address questions and assist in making data corrections that the BCWDA System Administrators and WIOA Title I field staff are unable to complete. The State System Administrators shall also communicate system needs, requirements and corrections with the software vendor, Geographic Solutions. The State System Administrators will meet periodically with the BCWDA System Administrators to communicate system issues and improvements, as well as obtain feedback about system needs.

The current VaWC State System WIOA Administrators:

Brian Long – blong@vccs.edu – 804-819-1688

Melanie MacDonald - mmacdonald@vccs.edu – 804-819-3331

Role of the BCWDA VaWC System Administrator

The BCWDA System Administrators have the highest level of VaWC System access for their specific BCWDA. This group can enter, add, and update WIOA Title I data for program participants in the BCWDA. The BCWDA System Administrators can correct most errors made by staff and they are not bound by the 21-day system data entry limitation. The BCWDA System Administrators cannot delete any data from the system, but they do have the ability to void the status of services that were keyed in error. Any error that the BCWDA System Administrators cannot correct should be immediately communicated to and reviewed with the State System Administrators.

The BCWDA System Administrators are also responsible for submitting new WIOA Title I staff user forms to initiate VaWC system access, as well as advising the State System Administrators when BCWDA staff system access needs to be activated, modified, or revoked.

The current VaWC BCWDA System WIOA Administrator:

GUIDANCE

New WIOA staff access to the system:

Only the State System Administrators can create staff user accounts. The BCWDA System Administrator will initiate this process by having the new staff member complete the most recent version of the system access form (the most recent form was updated April, 2019). The staff will complete the form, review and sign the Information Systems Security Access Acknowledgement Agreement. This form must also be reviewed and signed by the staff member's supervisor and BCWDA System Administrator. The completed form is then submitted to the State System Administrator for processing. The form may be submitted by mail, faxed, or scanned and e-mailed. It is recommended that a copy of these forms be retained by the BCWDA and these forms be kept in a locked and secure location. The State System Administrators will establish the WIOA Title I staff user account and retain a copy of the access form. These forms shall be kept and maintained in accordance with the standard WIOA documentation requirements.

Once the new staff user account has been established, the user account and temporary password will be communicated to the BCWDA System Administrator. The BCWDA System Administrator will share this information with the new staff member and insure they have the required information to access to the system. Upon successful login, the system will require the staff member to create a unique and secure password. The password must be at least 8 characters and should contain at least one uppercase letter, one lowercase letter and one number.

User login information and password information must not be listed together in any documents and password information is not to be e-mailed.

WIOA Staff account modification or inactivation

When a WIOA Title I staff account needs to be modified or terminated, the BCWDA System Administrator must communicate this need immediately to the State System Administrator. This includes conditions where staff roles and responsibilities change as well as when employment is terminated. The BCWDA System Administrator will contact the State System Administrator immediately when a WIOA staff member's employment is terminated. The State System Administrator will make the necessary changes to the WIOA staff account and contact the BCWDA System Administrator to advise them of the change.

The State System Administrator shall conduct a quarterly review of all active accounts with each BCWDA System Administrator to ensure that only authorized staff has access to the system. The State System Administrator will send a report to each BCWDA System Administrator. This

report will include a list of all the WIOA Title I staff within the BCWDA that have access to the system, their access level and the date on which they last accessed the system. The BCWDA System

Administrator will review the report; confirm the staff are attached to the appropriate access level and that they still require access to the system. The BCWDA System Administrator will return the report to the State System Administrator along with any details related to findings or required account changes, such as account inactivation or change in access level. The State System Administrator also shall review the access level of all WIOA Title I staff that have access to the system. Any staff account that has not been accessed within a 90-day period shall be automatically inactivated.

Data Corrections

Local WIOA service provider staff will communicate the need for any data correction they are unable to complete with their specific BCWDA System Administrator. Any corrections that cannot be completed by the BCWDA System Administrator should be communicated to the State System Administrator for review. The State System Administrator shall review the validity of the correction and communicate the appropriate action and/or outcome with the BCWDA System Administrator.

Most information can be communicated through e-mail; however, it is extremely critical that secure information, such as Social Security Numbers, not be listed in e-mailed communications. When identifying clients in e-mail communications, staff should identify the clients by their system-generated State Identification number. Please see VaWC WIOA Title I Data Change Request VWL and the most recent Data Change Request Form for the process and details.

Bay Consortium Workforce Development Board

Policy Number: 14-01

Effective Date: July 1, 2014

Revised Date: November 3, 2020

Title: Case Management, Case Notes, and IEP/ISS Update and Review
Policy

PURPOSE

This policy provides WIOA service providers guidance regarding the uniform electronic documentation of participant records, required naming conventions for participant documents uploaded into the system of record, adding and removing of participant documents to the system, standards for case note quality, and timely data entry requirements.

REFERENCES

- Public Law (Pub. L) 113-128 Workforce Innovation and Opportunity Act (WIOA) of 2014
- 20 Code of Federal Regulations (CFR), WIOA Final Rules and Regulations
- U.S. Department of Labor (USDOL-ETA) Training and Employment Guidance Letter (TEGL) 10-16, Change 1 Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III, and Title IV Core Programs
- U.S. Department of Labor (USDOL-ETA) Training and Employment Guidance Letter (TEGL) 39-11, Guidance on the Handling and Protection of Personally Identifiable Information (PII)
- E-Government Act of 2002
- Government Paperwork Elimination Act of 1998
- Paperwork Reduction Act of 1995
- Training and Employment Guidance Letter (TEGL) 07-18: Guidance for Validating Jointly Required Performance Data Submitted under the Workforce Innovation and Opportunity Act
- Training and employment Guidance Letter (TEGL) 23-19: Guidance for Validating Required Performance Data Submitted by Grant Recipients of U.S. Department of Labor (DOL) Workforce Programs
- ETA-9172 - DOL-only PARTICIPANT INDIVIDUAL RECORD LAYOUT (PIRL) OMB Control Number 1205-0521 Expiration Date: 06-30-2021TEGL 14-18 -- Aligning Performance Accountability Reporting, Definitions, and Policies Across Workforce Employment and Training Programs Administered by the U.S. Department of Labor (DOL).
- VWL 20-04: VaWC WIOA Title I Data Change Requests

- VWL 20-05: Local Workforce Development Area System Administrator Roles & Responsibilities
- VWL 20-06 WIOA Participant Activity Code Definitions, Projected Durations and Use Projection Limitations
- Virginia WIOA Title I Learning Resource Rescissions
- VWL 13-07: Virginia Workforce Connection (VaWC) system of Record and Entry of Case Notes in VaWC, Including Guidelines
- VWL 16-03: Standardized Participant File Format

DEFINITIONS

Virginia Workforce Connection (VaWC): The management system of record used for all data collection and reporting.

PIRL: The Participant Individual Record Layout (PIRL) is a standard reporting format that contains the Workforce Innovation and Opportunity Act (WIOA) common data elements and is used to report participant characteristics to the United States Department of Labor (USDOL-ETA).

BACKGROUND

Section 185 of the WIOA requires recipients of Title I funds to keep records that are sufficient to prepare reports on program performance and outcomes, and permit the tracking of expenditures to adequately ensure that funds have not been spent unlawfully. This guidance applies to electronic file storage and documentation imaging standards in the administration of WIOA Title I programs and other federally funded grant programs.

GUIDANCE

System of Record The VaWC is the “System of Record” with regard to Federal reporting for local WIOA Title I programs (Youth, Adult, and Dislocated Worker) and other USDOL-ETA grant-funded programs in the Commonwealth of Virginia. Currently, the VaWC is used to capture information on enrollment, service delivery, and performance data. The required documentation used to verify program eligibility and support service provision must be maintained in the VaWC. A newly accessible feature in VaWC, the electronic document imaging and storage system, will allow staff or local areas to facilitate the upload of supporting documentation and allow local areas to transition to paperless record keeping.

The use of electronic records will:

- Eliminate the need for storage areas and storage costs associated with paper files;
- Save supply costs;
- Provide for an easily accessible, single point of access for file review;

- Reduce staff time accessing hard copy documentation;
- Ensure more secure storage of sensitive information;
- Eliminate lost or misfiled paper documents;
- Improve the consistency of file documentation.

Electronic Case Files

Beginning December 1, 2020, and moving forward, all WIOA Contractors must record and document activities for all new participants enrolled in WIOA Title I (Youth, Adult, and Dislocated Worker) programs, and applicable discretionary grant programs, in the VaWC to ensure compliance with federal and state statutes, regulations, and policies.

The electronic records shall include the following in the appropriate section of the VaWC:

- Program applications;
- Eligibility determinations;
- Activity and service codes;
- Individualized Employment Plan (IEP) or Youth Individualized Service Strategy (ISS) utilizing the VaWC system generated planning module;
- Case notes;
- Case closure;
- Outcome (Exit) information;
- Follow-up;
- Documentation supporting eligibility, service delivery, and closure.

The electronic records will be made available to any staff from the USDOL-ETA, State auditor, or VCCS monitor and BCWDB program staff who requires access to carry out their official duties. Information will be made available in the VaWC system for new WIOA Contractor staff after completing the system access form.

Timely Entry of Data and Documentation into the VaWC

The VaWC serves as the basis for reporting to USDOL-ETA through the WIOA PIRL. Delays in data entry can adversely affect the quarterly and annual performance of the state and the local workforce areas, and result in inaccurate federal reports.

To address the impact of delayed data entry, ***all transactions (eligibility, receipt of services, outcomes, exit, and contact with participants) must be entered into the VaWC within fourteen (14) business days from the completion of the process.*** For example, once the customer has been determined eligible and has received their first service, the participation information must be entered into VaWC within 14 business days. The Primary Indicators of Performance are based on the exit outcomes of these individuals. It is imperative that accurate information is entered into the State's data management system in a timely manner in order to generate appropriate reports at the State and Federal levels, as well as Bay Consortium Area Reporting; (including documentation to support credentials or employment attainment).

The WIOA Contractors compliance with the 14-business day rule will be reviewed by the BCWDB monitor, as well as state and federal WIOA Compliance Monitors and instances of noncompliance will be included in the Bay Consortium monitoring report as a finding.

Documentation Uploads

Starting December 1, 2020 and moving forward, all documentation for new program participants shall be uploaded into the VaWC to create electronic records. Document uploads shall be within the -14- business day timely data entry requirement. Documents will also be uploaded from the files of current active participants enrolled on or after July 1, 2020. BCWDB staff will select the appropriate verification item, type, and document description from a drop down-menu for each document. WIOA Contractor Staff shall also “tag” uploaded documents with keywords, which will allow documents to be found using keyword search. To ensure consistency, WIOA Contractor staff shall follow the naming/tagging conventions outlined in Attachment A: WIOA Title I VaWC Document Naming Conventions.

Case Notes

Case notes add context to elements in the electronic case file that are not clearly evidenced, such as participant factors affecting eligibility, important details about services provided to customers, and to inform the reader about the customer’s progress, lack of progress and/or obstacles associated with the services and/or referrals provided. Case notes compliment entries made in VaWC, to provide further explanations of service provided. Therefore, all case notes must be keyed in VaWC.

Case notes do not take the place of entering data in the appropriate sections of VaWC. For example, a case manager should not enter service information (service codes, start and end dates) in a Case Note rather than in the Create Activity section. Performance related information should be entered in the appropriate sections, such as Services, Measurable Skills Gains, Credential Attainment, and/or Follow-up sections. Case Notes are a planning tool and a source of documentation and information that can be used by case managers, supervisors, and monitors. WIOA files can be chosen for review by multiple entities such as the Virginia Board of Workforce Development (VBWD), the USDOL-ETA, Virginia Community College System (VCCS), and other organizations; therefore, accuracy and completeness in case notes are very important.

Case notes should tell the “who, what, where, when, and why” of the customer’s needs and services. Case notes describe the actions taken and the reasons behind those actions, along with the expected results. Consider the use of case notes as the means to tell a factual story of the customer. No opinions or comments of the case manager should be included. Anyone, including the customer, should be able to pick up the file and follow the story of what is happening with the customer.

All case notes must be entered into the VaWC within fourteen (14) business days from the date of contact.

IEP/ISS Update and Review

In an effort to review participants' changing needs and goals on a regular basis, a review of the Individual Employment Plan (IEP)/Individual Service Strategy (ISS) is necessary to address client needs and focus the plan in an appropriate direction. With this in mind the BCWDB is initiating an IEP/ISS update/review policy.

A review and update of the IEP/ISS is required every ninety (90) days at a minimum for ALL programs (Adult, Dislocated Worker, and Youth) with the following stipulations:

- The review will be documented in a VOS Case Note with the subject line reading "90 Day Update/Review".
 - The Case Note will clearly state what change(s) are needed in the IEP/ISS.
 - If there are no changes/updates to the IEP/ISS clearly state this fact in the Case Note.
 - The Case Note will be printed and signed by the participant and case manager and retained in the Case Notes section of the client file.
 - A corresponding objective & goal will be created in the Plan in VOS
-
- Original hard copy of the signed IEP/ISS as well as all review/update signed case notes must be retained in the client file for review and monitoring purposes.

Medical/Disability Records

Medical and disability related information, also known as protected health information (PHI) under the Health Insurance Portability and Accountability Act (HIPA) of 1996 must be kept confidential and separate from the VaWC electronic case record. Such information shall be kept in a paper file in a secure, locked location. A case note in VaWC shall contain a generic explanation of the information, how it is related to eligibility, employment, and/or training opportunities, and identify the secure location of the information. (i.e., "Participant wants to be a mechanic, but needs to pursue other employment or training. See confidential file." or "Individual meets local adult eligibility priority of service group. See confidential file.").

Records Correction and Deleting Documents

Records in the VaWC that contain errors must be corrected to ensure accurate reporting to USDOL-ETA. Requests for data correction shall first be submitted to the Bay Consortium Area System Administrator (*Steven Golas*) for review and completion utilizing the approved data correction form from the WIOA Title I Administrator, VCCS. Any corrections that cannot be completed by the Bay Consortium Area System Administrator should be communicated to the State System Administrator via the BCWDB for review. The State System Administrator shall review the validity of the correction and communicate the appropriate action or outcome to the Bay Consortium Area System Administrator. Record corrections in third-party systems are the responsibility of the local area staff using those systems and are processed according to the local board's policies or procedures manuals.

Only under limited circumstances will staff be allowed to delete documents from an applicant's electronic file. The process of deleting a document will be performed by the Bay Consortium Area System Administrator or State System Administrator. Program staff shall submit a request for the deletion along with the reason for the deletion. The State System Administrator reviews requests for deletion of documents and if determined appropriate will perform the deletion.

The WIOA Title I Administrator will work with the vendor of the VaWC software (Geographic Solutions) to ensure that participant documents that are stored in the system are appropriately deleted after the required retention period for the documents has expired.

Confidentiality of Data or Information and Required Release Forms

Data or information acquired by an agency under a confidentiality agreement, to be used exclusively for statistical purposes, shall not be disclosed by an agency in identifiable form for any use other than an exclusively statistical purpose. The use of this information is prohibited except with the informed consent of the respondent (Public Law 107-347 Title V Section 512[b][1]). ***All providers will have a release of information form signed and dated by the participant and the case manager.*** The form shall state that the participant's information may be used for reporting purposes because of federal regulations associated with the benefit of federal funds and that the participant's personal information will remain confidential. The release form will be uploaded into the participant file in VaWC to validate that the participant agrees to the release of information for reporting purposes. The standardized form will also be made available by the BCWDB staff and may be used as a stand-alone form or incorporated into other release forms used by the BCWDB.

Legal Status of Electronic Documents

Electronic records submitted or maintained in accordance with procedures developed under this title, or electronic signatures or other forms of electronic authentication used in accordance with such procedures, shall not be denied legal effect, validity, or enforceability because such records are in electronic form.

The purpose of this policy is to describe the general expectations and responsibilities for professional staff performing Case Management support for participants enrolled under WIOA programs being administered through the Bay Consortium Workforce Development Board (BCWDB).

ATTACHMENT A

WIOA Title I VaWC Document Naming Conventions

WIOA Service Providers uploading documents should name and tag their documents according to the naming convention identified below to facilitate ease of document identification and ensure consistency among staff.

WIOA Service Providers reviewing documents uploaded by individuals as part of the WIOA Title I pre-application should tag the documents according to the naming/tagging conventions below to ensure ease of document identification.

Criteria	Documents TAG ID
<p>Age:</p> <ul style="list-style-type: none"> (Birth certificate, Passport, State-issued Driver's License or ID, school records, DD-214, Green Card, etc.– must show the date of birth) 	<p>Examples: Birth Cert Driver's License Passport</p>
<p>Citizenship/Eligible to Work:</p> <ul style="list-style-type: none"> (Birth Certificate, Social Security Card w/ID, DD-214, Naturalization Certificate, US Passport, Employment Authorization Card w/photo). <i>See USCIS.gov for a full list of accepted documents.</i> 	<p>Examples: Birth Cert Soc Sec Card Passport</p>
<p>Selective Service Registration: (Required after January 1, 1960)</p> <ul style="list-style-type: none"> (Internet verification, DD-214, Selective Service Telephone Verification 847-688-6888, Telephone verification form signed by the verifier and a Consent to Release Information form signed by the participant.) 	<p>Examples: Selective Service Internet Selective Service DD 214 Selective Service Telephone</p>
<p>DW-proof of separation:</p> <ul style="list-style-type: none"> (Layoff letter, letter of closure, verification form employment agency, media announcement of layoff or closure, WARN Notice, telephone verification completed with the employer and signed by the verifier.) 	<p>Examples: DW (<i>Name of Document</i>) DW Layoff Letter DW Media Announcement DW WARN DW Telephone</p>
<p>Unemployment Insurance eligibility/payments:</p> <ul style="list-style-type: none"> (UI documents or printout that demonstrate the individual is eligible for, or has exhausted UI benefits, or does not work for a covered employer.) 	<p>Examples: DW (<i>Name of Document</i>) DW UI Printout</p>

<p>DW-Unlikely to Return to Previous Industry of Occupation Analysis:</p> <ul style="list-style-type: none"> (LMI showing an occupation in decline, Receipt of UI benefits for at least 12 of the previous 26 weeks, Completed and signed copy of VEC REO program, Documentation acceptable according to LWDB policy on ULTR.) 	<p>Examples: DW (<i>Name of Document</i>) DW ULTR LMI DW ULTR UI Printout DW ULTR REO Plan DW ULTR LWDB</p>
<p>DW-Formerly Self-employed:</p> <ul style="list-style-type: none"> (Chapter 7 or Chapter 11 Bankruptcy public notice showing the date, letter from a trustee of the bankruptcy court, statement of failure from business supplier or customer, IRS forms) 	<p>Examples: DW (<i>Name of Document</i>) DW Bankruptcy Letter</p>
<p>DW-Displaced Homemaker/Military Spouse:</p> <ul style="list-style-type: none"> (Divorce decree, IRS form, court records, bank/financial records, spouse disability check, spouse death certificate, a signed document from family - AND Employment verification (previous, current, or prospective depending on employment status, job search verification) 	<p>Examples: DW (<i>Name of Document</i>) DW Divorce Decree DW Court Records DW Financial Records</p>
<p>School Status:</p> <ul style="list-style-type: none"> (ISY-school records) 	<p>Examples: School Status (<i>Name of Document</i>) (OSY-diploma, GED, school transcript/records with graduation date) School Status Diploma School Status Records</p>
<p>Youth Barrier:</p> <ul style="list-style-type: none"> BSD/English Language Learner-Generally accepted Standardized Test, school records Pregnant/parenting-child's birth certificate, hospital record of birth, a statement from Dr. or social service agency Foster Child-court documents, Social Services letter, verification of foster care payments made on behalf of child Homeless/Runaway- Statement from a shelter, social service agency, court contact, Drop-out/not attending school-school records Offender-court documents, letter of probation or parole, police records Youth w/Disability-school records, rehab eval, Dr. statement Low-income OSY-needs additional assistance to enter or complete an education program or secure and hold employment – must meet local area criteria 	<p>Examples: Barrier (<i>Document Name</i>) Barrier School Records Barrier Child Birth Cert Barrier Court Docs Barrier Dr Letter</p>
<p>Youth Income (as applicable):</p>	<p>Examples: Income ISY</p>

<ul style="list-style-type: none"> (In-school Youth, Out-of-school Youth w/HS diploma who is BSD) 	Income OSY
<p>Priority of Service:</p> <ul style="list-style-type: none"> (DD-214, military service documents, a document showing spouse was veteran, TANF, SNAP, pay-stubs, a generally accepted standardized test showing BSD, documents showing barriers to employment- <i>refer to VWL 18-04.</i>) 	<p>Examples:</p> <p>POS (<i>Name of Document</i>) POS DD 214 POS SNAP Letter POS TABE Test POS Court Documents</p>
<p>Equal Opportunity Notice:</p> <ul style="list-style-type: none"> (EO notice of rights signed and dated by the participant) 	<p>Examples:</p> <p>EO Notice</p>
<p>Grievance Policy:</p> <ul style="list-style-type: none"> (Acknowledgment of understanding of the local grievance policy and procedures) 	<p>Examples:</p> <p>Grievance Policy</p>
<p>Consent to Exchange Information:</p> <ul style="list-style-type: none"> (Consent forms signed and dated by the participant; updated forms as required according to expiration) 	<p>Examples:</p> <p>Consent Form Consent Form Rev 1</p>
<p>Other Local Administrative Forms:</p> <ul style="list-style-type: none"> (Applicable if LWDA has locally required forms. Examples could be a photographic release form or client responsibility form.) 	<p>Examples:</p> <p>BCWDB <i>Form Name</i></p>
<p>Partner Referral:</p> <ul style="list-style-type: none"> (Referrals to or from partner entities) 	<p>Examples:</p> <p>Referral (<i>Partner Name</i>) Referral DARS Referral Adult Ed</p>
<p>Assessments:</p> <ul style="list-style-type: none"> (Objective assessment, basic skills assessment, Interest Inventory, School Records) 	<p>Examples:</p> <p>Assess (<i>Assessment Type</i>) Assess Objective Assess Basic Skills Pre Assess Basic Skills Post Assess Career Interest Assess School Rec IEP</p>
<p>Occupational Skills Training:</p> <ul style="list-style-type: none"> Customer Choice in Training-signed by the participant 	<p>Examples:</p> <p>Training (<i>Document Name</i>) Training Customer Choice Labor Market Information Training Course Curriculum Cost Estimate Sheet Financial Aid Analysis-must be from the school Individual Training Account (ITA)-signed School Invoice Training LMI Training Cost Estimate Training ITA Training Invoice 1 (2,3,4...) Training Payment 1 (2,3,4...) Training ITA Packet 1 (2,3,4) (all ITA docs)</p>
<p>Work-Based Training</p>	<p>Examples:</p>

<p>(OJT/IWT/CT/WEX):</p> <ul style="list-style-type: none"> • Agreement/Contract (signed by parties) • Job Description • Training Plan • Timesheets signed by participant and supervisor • Invoice • Payment w/date • Performance Evaluation 	<p>WBT (<i>Type of Training</i>) WBT OJT Contract <i>Employer Name</i> WBT OJT Timesheet 1 (2,3,4...) WBT OJT Payment 1 (2,3,4...) WBT OJT Job description WBT WEX Agreement <i>Employer Name</i> WBT WEX Timesheet 1 (2,3,4...) WBT WEX Payment 1 (2,3,4...) WBT WEX Evaluation 1 (2,3,4...)</p>
<p>Supportive Services:</p> <ul style="list-style-type: none"> • Support Service Determination Form • Support Service Invoice • Support Service Payment Voucher • Support Service Receipt • Eligibility for Needs-Based Payments • Needs-Based Payment 	<p>Examples: Supp Serv (<i>Type of Service</i>) Supp Serv Determination Supp Serv Mileage 1 (2,3,4...) Supp Serv Mileage Payment 1 (2,3,4...) Supp Serv Child Care 1 (2,3,4...) Supp Serv Medical 1 (2,3,4...) Supp Serv NBP 1 (2,3,4...)</p>
<p>Incentives:</p> <ul style="list-style-type: none"> • Incentive 	<p>Examples: Incentive 1 (2,3,4...) Incentive Payment Incentive Payment 1 (2,3,4...)</p>
<p>Measurable Skills Gain:</p> <ul style="list-style-type: none"> • Educational Functioning Level (EFL)-standardized test • Learning Milestone-school transcript/report card • High School Diploma earned while in the program • Training milestone-complete OJT, complete 1-yr apprenticeship • Passing a required occupational exam 	<p>Examples: MSG (<i>Type of MSG</i>) MSG EFL TABE 1 (2,3,4...) MSG HS Diploma MSG OJT Eval MSG License Exam</p>
<p>Credential: (earned after enrollment)</p> <ul style="list-style-type: none"> • Degree/Diploma • Occupational Skills Certificate • Occupational Skills License • Academic Record/Transcript 	<p>Examples: Cred (<i>Type of Credential</i>) Cred HS Diploma Cred AA Degree Cred RN License Cred CDL</p>
<p>Closure/Exit:</p> <ul style="list-style-type: none"> • Follow-up Contact Information • Employment Verification • Work Number or other online employment verification • Documentation for Global Exclusion 	<p>Examples: Exit (<i>Type of Document</i>) Exit Employment Verification Exit Work Number mmddyy Exit Global Court Doc Exit Global Dr Letter</p>

Bay Consortium Workforce Development Board, Inc.
Performance and Accountability Committee Meeting
Draft Notes
Wednesday, October 21, 2020
9:00 A.M.

The Performance and Accountability Committee met Wednesday, October 21, 2020 via Zoom.

Call to Order: Steve Goodall called the committee meeting to order at 9 a.m.

Roll Call: Present were Steve Goodall, Vanesa Livingstone, and Chantel Roane. Not present was Percy Pollard and Bridgett Landess. In addition, present were Jackie Davis, Steven Golas and Katlyn Moss, WDB Staff. A quorum was present.

Public Input: There was no public input.

Approval of Minutes: A motion was made to approve the minutes from the July 16, 2020 meeting, which was seconded and approved.

New Business: Steven Golas went over the quarterly reports. He stated that he was still waiting to receive the goals for the Measurable Skills Gain requirement. He noted that Eastern Shore Community College was not meeting the 40% Minimum Training Expenditure Requirement and they would receive a letter requesting a Corrective Action Plan. He noted that Rappahannock Community College had not enrolled any new clients on the Middle Peninsula this quarter, as well as not currently serving any clients from King and Queen County, King William County, Mathews County, and Middlesex County, and they would receive a letter requesting a Corrective Action Plan. He reviewed the addition of the Wagner-Peyser reports. He reviewed the Economic Equity Initiative Contract Expenditures, and noted that they had requested a no cost extension till June 30, 2021. Jackie Davis updated members on the COVID 19 Rapid response, noting that forty-one businesses had been served in the Bay Consortium WDB region, and that it had ended August 31, 2020. Jackie Davis reviewed the Request for Proposals (RFPs) with members, noting that the plan was to release the RFPs earlier to ease the transition if a change in providers occurs.

Old Business: There was no old business.

Other Items for Discussion: There were no other topics for discussion.

There being no further business, the meeting was adjourned at 10:10 a.m.

Respectfully submitted,
Katlyn Moss

Performance Reports

Rappahannock Goodwill Industries													
		1st Quarter PY 20 7/1/20 - 9/30/20			2nd Quarter PY 20 10/1/20 - 12/31/20			3rd Quarter PY 20 1/1/21 - 3/31/21			4th Quarter PY 20 4/1/21 - 6/30/21		
Customer Summary Information													
Planned Number of Participants for PY		70											
Total Participants Served		42											
Percent of Planned		60%			-			-			-		
New Clients Enrolled this Quarter		3											
WIOA Adult		25											
WIOA Dislocated Worker		17											
Follow Up Information													
Total Follow-Ups Required		63											
Total Follow-Ups Completed		63											
Total Follow-Up Not Completed		0			0			0			0		
Employment 2nd Quarter after Exit													
WIOA Adult Program - 82.6%		83.3%	10	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
			12	# exited		# exited		# exited		# exited		# exited	
WIOA Dislocated Worker Program - 85%		80.0%	4	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
			5	# exited		# exited		# exited		# exited		# exited	
Employment 4th Quarter after Exit													
WIOA Adult Program - 85%		90.0%	9	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
			10	# exited		# exited		# exited		# exited		# exited	
WIOA Dislocated Worker Program - 90%		92.3%	12	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
			13	# exited		# exited		# exited		# exited		# exited	
Median Earnings 2nd Quarter after Exit													
WIOA Adult Program		\$6,000.00	Not Available		\$6,000.00		\$6,000.00		\$6,000.00		\$6,000.00		
WIOA Dislocated Worker Program		\$8,700.00	Not Available		\$8,700.00		\$8,700.00		\$8,700.00		\$8,700.00		
Credential Attainment within Four Quarters after Exit													
WIOA Adult Program - 74%		88.9%	8	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	
			9	# exited		# exited		# exited		# exited		# exited	
WIOA Dislocated Worker Program - 70%		72.7%	8	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	
			11	# exited		# exited		# exited		# exited		# exited	
Measurable Skills Gain													
WIOA Adult Program - 70.2%		-	NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained	
			NA	# exited		# exited		# exited		# exited		# exited	
WIOA Dislocated Worker Program - 69.8%		-	NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained	
			NA	# exited		# exited		# exited		# exited		# exited	
40% Minimum Training Expenditure Requirement													
46.05%	WIOA Adult Program		42.5%	\$ 3,366.84	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures		
				\$ 7,923.64	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures		
	WIOA Dislocated Worker Program		47.4%	\$ 9,981.90	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures		
				\$ 21,062.00	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures		
Total Contract Expenditures													
13.59%	WIOA Adult Program		12.1%	\$ 8,024.74	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures		
				\$ 66,155.00	Total Contract		Total Contract		Total Contract		Total Contract		
	WIOA Dislocated Worker Program		14.2%	\$ 21,998.24	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures		
				\$ 154,797.68	Total Contract		Total Contract		Total Contract		Total Contract		

George Washington Planning District 16 Data

1st Quarter PY 20

Customer Summary Information

Planned Number of Participants for PY	70
Total Participants Served	40
Percent of Planned	57%
Planning District 16 Total New Clients Enrolled this Quarter	3
WIOA Adult	23
WIOA Dislocated Worker	17
Spotsylvania County New Clients Enrolled this Quarter	2
WIOA Adult	8
WIOA Dislocated Worker	5
Stafford County New Clients Enrolled this Quarter	0
WIOA Adult	6
WIOA Dislocated Worker	5
Caroline County New Clients Enrolled this Quarter	0
WIOA Adult	1
WIOA Dislocated Worker	1
King George County New Clients Enrolled this Quarter	1
WIOA Adult	3
WIOA Dislocated Worker	2
City of Fredericksburg New Clients Enrolled this Quarter	0
WIOA Adult	5
WIOA Dislocated Worker	4

Rappahannock Community College													
		1st Quarter PY 20 7/1/20 - 9/30/20		2nd Quarter PY 20 10/1/20 - 12/31/20		3rd Quarter PY 20 1/1/21 - 3/31/21		4th Quarter PY 20 4/1/21 - 6/30/21					
Customer Summary Information													
Planned Number of Participants for PY		83											
Total Participants Served		51											
Percent of Planned		61%		-		-		-					
New Clients Enrolled this Quarter		10											
WIOA Adult		50											
WIOA Dislocated Worker		1											
Follow Up Information													
Total Follow-Ups Required		73											
Total Follow-Ups Completed		73											
Total Follow-Up Not Completed		0		0		0		0					
Employment 2nd Quarter after Exit													
WIOA Adult Program - 82.6%		95.8%		23	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				24	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 85%		100.0%		2	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				2	# exited		# exited		# exited		# exited		# exited
Employment 4th Quarter after Exit													
WIOA Adult Program - 85%		82.6%		19	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				23	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 90%		100.0%		1	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				1	# exited		# exited		# exited		# exited		# exited
Median Earnings 2nd Quarter after Exit													
WIOA Adult Program		\$6,000.00	Not Available	\$6,000.00		\$6,000.00		\$6,000.00		\$6,000.00		\$6,000.00	
WIOA Dislocated Worker Program		\$8,700.00	Not Available	\$8,700.00		\$8,700.00		\$8,700.00		\$8,700.00		\$8,700.00	
Credential Attainment within Four Quarters after Exit													
WIOA Adult Program - 74%		86.4%		19	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed
				22	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 70%		0.0%		0	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed
				1	# exited		# exited		# exited		# exited		# exited
Measurable Skills Gain													
WIOA Adult Program - 70.2%		-		NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained
				NA	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 69.8%		-		NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained
				NA	# exited		# exited		# exited		# exited		# exited
40% Minimum Training Expenditure Requirement													
86.25%		WIOA Adult Program		91.7%		\$ 26,351.90	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures
						\$ 28,739.60	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures
86.25%		WIOA Dislocated Worker Program		0.0%		\$ -	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures
						\$ 1,812.30	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures
Total Contract Expenditures													
10.18%		WIOA Adult Program		16.8%		\$ 28,739.60	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures
						\$170,694.64	Total Contract		Total Contract		Total Contract		Total Contract
10.18%		WIOA Dislocated Worker Program		1.4%		\$ 1,812.30	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures
						\$129,546.31	Total Contract		Total Contract		Total Contract		Total Contract

Northern Neck Planning District 17 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		43
Total Participants Served		22
Percent of Planned		51%
Planning District 17 Total New Clients Enrolled this Quarter		4
	WIOA Adult	22
	WIOA Dislocated Worker	0
Lancaster County New Clients Enrolled this Quarter		0
	WIOA Adult	5
	WIOA Dislocated Worker	0
Northumberland County New Clients Enrolled this Quarter		0
	WIOA Adult	3
	WIOA Dislocated Worker	0
Richmond County New Clients Enrolled this Quarter		2
	WIOA Adult	7
	WIOA Dislocated Worker	0
Westmoreland County New Clients Enrolled this Quarter		2
	WIOA Adult	7
	WIOA Dislocated Worker	0

Middle Peninsula Planning District 18 Data

1st Quarter PY 20

Customer Summary Information

Planned Number of Participants for PY	40
Total Participants Served	15
Percent of Planned	38%
Planning District 18 Total New Clients Enrolled this Quarter	3
WIOA Adult	14
WIOA Dislocated Worker	1
Essex County New Clients Enrolled this Quarter	2
WIOA Adult	5
WIOA Dislocated Worker	1
King and Queen County New Clients Enrolled this Quarter	0
WIOA Adult	1
WIOA Dislocated Worker	0
King William County New Clients Enrolled this Quarter	0
WIOA Adult	2
WIOA Dislocated Worker	0
Mathews County New Clients Enrolled this Quarter	0
WIOA Adult	0
WIOA Dislocated Worker	0
Middlesex County New Clients Enrolled this Quarter	1
WIOA Adult	6
WIOA Dislocated Worker	0

Eastern Shore Community College													
		1st Quarter PY 20 7/1/20 - 9/30/20		2nd Quarter PY 20 10/1/20 - 12/31/20		3rd Quarter PY 20 1/1/21 - 3/31/21		4th Quarter PY 20 4/1/21 - 6/30/21					
Customer Summary Information													
Planned Number of Participants for PY		45											
Total Participants Served		26											
Percent of Planned		58%		-		-		-					
New Clients Enrolled this Quarter		7											
WIOA Adult		23											
WIOA Dislocated Worker		3											
Follow Up Information													
Total Follow-Ups Required		41											
Total Follow-Ups Completed		41											
Total Follow-Up Not Completed		0		0		0		0					
Employment 2nd Quarter after Exit													
WIOA Adult Program - 82.6%		100.0%		12	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				12	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 85%		100.0%		2	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				2	# exited		# exited		# exited		# exited		# exited
Employment 4th Quarter after Exit													
WIOA Adult Program - 85%		71.4%		5	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				7	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 90%		100.0%		2	# employed	-	# employed	-	# employed	-	# employed	-	# employed
				2	# exited		# exited		# exited		# exited		# exited
Median Earnings 2nd Quarter after Exit													
WIOA Adult Program		\$6,000.00	Not Available	\$6,000.00		\$6,000.00		\$6,000.00		\$6,000.00		\$6,000.00	
WIOA Dislocated Worker Program		\$8,700.00	Not Available	\$8,700.00		\$8,700.00		\$8,700.00		\$8,700.00		\$8,700.00	
Credential Attainment within Four Quarters after Exit													
WIOA Adult Program - 74%		50.0%		3	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed
				6	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 70%		100.0%		2	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed
				2	# exited		# exited		# exited		# exited		# exited
Measurable Skills Gain													
WIOA Adult Program - 70.2%		-		NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained
				NA	# exited		# exited		# exited		# exited		# exited
WIOA Dislocated Worker Program - 69.8%		-		NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained
				NA	# exited		# exited		# exited		# exited		# exited
40% Minimum Training Expenditure Requirement													
15.49%	WIOA Adult Program		17.7%		\$ 4,320.00	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-
					\$ 24,462.16	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures	
	WIOA Dislocated Worker Program		10.5%		\$ 1,120.00	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-
					\$ 10,653.79	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures	
Total Contract Expenditures													
17.35%	WIOA Adult Program		22.0%		\$ 24,956.39	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures	-
					\$113,313.88	Total Contract		Total Contract		Total Contract		Total Contract	
	WIOA Dislocated Worker Program		11.7%		\$ 11,114.02	Expenditures	-	Expenditures	-	Expenditures	-	Expenditures	-
					\$ 94,622.95	Total Contract		Total Contract		Total Contract		Total Contract	

Eastern Shore Planning District 22 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		45
Total Participants Served		25
Percent of Planned		56%
Planning District 22 Total New Clients Enrolled this Quarter		7
	WIOA Adult	23
	WIOA Dislocated Worker	2
Accomack County New Clients Enrolled this Quarter		6
	WIOA Adult	17
	WIOA Dislocated Worker	1
Northampton County New Clients Enrolled this Quarter		1
	WIOA Adult	6
	WIOA Dislocated Worker	1

SkillSource Group													
		1st Quarter PY 20 7/1/20 - 9/30/20			2nd Quarter PY 20 10/1/20 - 12/31/20			3rd Quarter PY 20 1/1/21 - 3/31/21			4th Quarter PY 20 4/1/21 - 6/30/21		
Customer Summary Information													
Planned Number of Participants for PY		39											
Total Participants Served		22											
Percent of Planned		56%			-			-			-		
New Clients Enrolled this Quarter		3											
WIOA Youth		22											
Follow Up Information													
Total Follow-Ups Required		29											
Total Follow-Ups Completed		29											
Total Follow-Up Not Completed		0			0			0			0		
Employment 2nd Quarter after Exit													
WIOA Youth - 77.3%		77.8%	7	# employed	-		# employed	-		# employed	-		# employed
			9	# exited			# exited			# exited			# exited
Employment 4th Quarter after Exit													
WIOA Youth - 62.8%		-	0	# employed	-		# employed	-		# employed	-		# employed
			0	# exited			# exited			# exited			# exited
Credential Attainment within Four Quarters after Exit													
WIOA Youth - 70%		-	0	# credentialed	-		# credentialed	-		# credentialed	-		# credentialed
			0	# exited			# exited			# exited			# exited
Measurable Skills Gain													
WIOA Youth - 69.1%		-	NA	# gained	-		# gained	-		# gained	-		# gained
			NA	# exited			# exited			# exited			# exited
20% Work Experience Expenditure Requirement													
38.94%	WIOA Youth		38.9%	\$ 8,835.75	Training Expenditures	-		Training Expenditures	-		Training Expenditures	-	
				\$ 22,689.87	Total Expenditures			Total Expenditures			Total Expenditures		Total Expenditures
Total Contract Expenditures													
23.69%	WIOA Youth		23.7%	\$ 22,689.87	Expenditures	-		Expenditures	-		Expenditures	-	
				\$ 95,773.09	Total Contract			Total Contract			Total Contract		Total Contract

George Washington Planning District 16 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		39
Total Participants Served		21
Percent of Planned		54%
Planning District 16 Total New Clients Enrolled this Quarter		2
	WIOA Youth	19
Spotsylvania County New Clients Enrolled this Quarter		1
	WIOA Youth	8
Stafford County New Clients Enrolled this Quarter		1
	WIOA Youth	7
Caroline County New Clients Enrolled this Quarter		0
	WIOA Youth	0
King George County New Clients Enrolled this Quarter		0
	WIOA Youth	1
City of Fredericksburg New Clients Enrolled this Quarter		0
	WIOA Youth	3

Rappahannock Community College													
		1st Quarter PY 20 7/1/20 - 9/30/20		2nd Quarter PY 20 10/1/20 - 12/31/20		3rd Quarter PY 20 1/1/21 - 3/31/21		4th Quarter PY 20 4/1/21 - 6/30/21					
Customer Summary Information													
Planned Number of Participants for PY		45											
Total Participants Served		33											
Percent of Planned		73%		-		-		-					
New Clients Enrolled this Quarter		1											
WIOA Youth		33											
Follow Up Information													
Total Follow-Ups Required		8											
Total Follow-Ups Completed		8											
Total Follow-Up Not Completed		0		0		0		0					
Employment 2nd Quarter after Exit													
WIOA Youth - 77.3%		50.0%		1 # employed		-		# employed		-		# employed	
				2 # exited				# exited				# exited	
Employment 4th Quarter after Exit													
WIOA Youth - 62.8%		50.0%		1 # employed		-		# employed		-		# employed	
				2 # exited				# exited				# exited	
Credential Attainment within Four Quarters after Exit													
WIOA Youth - 70%		-		0 # credentialed		-		# credentialed		-		# credentialed	
				0 # exited				# exited				# exited	
Measurable Skills Gain													
WIOA Youth - 69.1%		-		NA # gained		-		# gained		-		# gained	
				NA # exited				# exited				# exited	
20% Work Experience Expenditure Requirement													
20.90% WIOA Youth		20.9%		\$ 5,132.45 Training Expenditures		-		Training Expenditures		-		Training Expenditures	
				\$ 24,553.70 Total Expenditures				Total Expenditures				Total Expenditures	
Total Contract Expenditures													
16.85% WIOA Youth		16.9%		\$ 24,553.70 Expenditures		-		Expenditures		-		Expenditures	
				\$145,708.29 Total Contract				Total Contract				Total Contract	

Northern Neck Planning District 17 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		24
Total Participants Served		22
Percent of Planned		92%
Planning District 17 Total New Clients Enrolled this Quarter		1
	WIOA Youth	22
Lancaster County New Clients Enrolled this Quarter		0
	WIOA Youth	2
Northumberland County New Clients Enrolled this Quarter		0
	WIOA Youth	3
Richmond County New Clients Enrolled this Quarter		1
	WIOA Youth	9
Westmoreland County New Clients Enrolled this Quarter		0
	WIOA Youth	8

Middle Peninsula Planning District 18 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		21
Total Participants Served		7
Percent of Planned		33%
Planning District 18 Total New Clients Enrolled this Quarter		0
	WIOA Youth	7
Essex County New Clients Enrolled this Quarter		0
	WIOA Youth	7
King and Queen County New Clients Enrolled this Quarter		0
	WIOA Youth	0
King William County New Clients Enrolled this Quarter		0
	WIOA Youth	0
Mathews County New Clients Enrolled this Quarter		0
	WIOA Youth	0
Middlesex County New Clients Enrolled this Quarter		0
	WIOA Youth	0

Eastern Shore Community College												
	1st Quarter PY 20 7/1/20 - 9/30/20			2nd Quarter PY 20 10/1/20 - 12/31/20			3rd Quarter PY 20 1/1/21 - 3/31/21			4th Quarter PY 20 4/1/21 - 6/30/21		
Customer Summary Information												
Planned Number of Participants for PY	23											
Total Participants Served	7											
Percent of Planned	30%			-			-			-		
New Clients Enrolled this Quarter	0											
WIOA Youth	7											
Follow Up Information												
Total Follow-Ups Required	27											
Total Follow-Ups Completed	27											
Total Follow-Up Not Completed	0			0			0			0		
Employment 2nd Quarter after Exit												
WIOA Youth - 77.3%	92.9%	13	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
		14	# exited		# exited		# exited		# exited		# exited	
Employment 4th Quarter after Exit												
WIOA Youth - 62.8%	25.0%	1	# employed	-	# employed	-	# employed	-	# employed	-	# employed	
		4	# exited		# exited		# exited		# exited		# exited	
Credential Attainment within Four Quarters after Exit												
WIOA Youth - 70%	100.0%	1	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	-	# credentialed	
		1	# exited		# exited		# exited		# exited		# exited	
Measurable Skills Gain												
WIOA Youth - 69.1%	-	NA	# gained	-	# gained	-	# gained	-	# gained	-	# gained	
		NA	# exited		# exited		# exited		# exited		# exited	
20% Work Experience Expenditure Requirement												
38.65%	WIOA Youth	38.7%	\$ 5,485.74	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures
			\$ 14,191.87	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures		
Total Contract Expenditure Requirement												
12.69%	WIOA Youth	12.7%	\$ 14,768.65	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures	-	Training Expenditures
			\$ 116,389.36	Total Expenditures		Total Expenditures		Total Expenditures		Total Expenditures		

Eastern Shore Planning District 22 Data

		1st Quarter PY 20
Customer Summary Information		
Planned Number of Participants for PY		23
Total Participants Served		7
Percent of Planned		30%
Planning District 22 Total New Clients Enrolled this Quarter		0
	WIOA Youth	7
Accomack County New Clients Enrolled this Quarter		0
	WIOA Youth	5
Northampton County New Clients Enrolled this Quarter		0
	WIOA Youth	2

1st Quarter PY 2020

	Negotiated Level	Actual	% of Negotiated Level	Status
Adult Measures				
Employment 2nd Quarter after Exit	82.6	93.8	113%	E
Employment 4th Quarter after Exit	85.0	85.0	100%	E
Median Earnings 2nd Quarter after Exit	\$6,000.00	NA	-	NA
Credential Attainment within 4 Quarters after Exit	74.0	81.1	110%	E
Measurable Skills Gain	70.2	NA	-	NA
Dislocated Workers Measures				
Employment 2nd Quarter after Exit	85.0	88.9	105%	E
Employment 4th Quarter after Exit	85.0	93.8	110%	E
Median Earnings 2nd Quarter after Exit	\$8,700.00	NA	-	NA
Credential Attainment within 4 Quarters after Exit	70.0	71.4	102%	E
Measurable Skills Gain	69.8	NA	-	NA
Youth Measures				
Employment 2nd Quarter after Exit	77.3	84.0	109%	E
Employment 4th Quarter after Exit	62.8	33.3	53%	FTM
Credential Attainment within 4 Quarters after Exit	70.0	100.0	143%	E
Measurable Skills Gain	69.1	NA	-	NA

BCWDB Performance Measure Definitions

Section 116 of the Workforce Innovation and Opportunity Act (WIOA) specifies the core metrics that the Local Workforce Development Boards (LWDB) and the state will be measured against. The following Indicators of Performance are part of the performance accountability system under WIOA:

Employment 2nd Quarter after Exit

The percentage of program participants who are in unsubsidized employment during the 2nd quarter after exit from the program.

(Adult and Dislocated Workers)

Participants in education, or training or employment in the 2nd quarter after exit. **(Youth)**

Employment 4th Quarter after Exit

The percentage of program participants who are in unsubsidized employment during the fourth quarter after exit from the program.

(Adult and Dislocated Workers)

Participants in education, or training or employment in the 4th quarter after exit. **(Youth)**

Median Earnings 2nd Quarter after Exit

The median earnings of program participants who are in unsubsidized employment in the second quarter after exit from the program. **(Adult, Dislocated Workers, Youth)**

Credential Attainment within Four Quarters after Exit

The percentage of program participants who attain a recognized postsecondary credential, or a secondary school diploma or its recognized equivalent, during program participation or within 1 year after exit from the program. **(Adult, Dislocated Workers, Youth)**

Measurable Skills Gain

The percentage of program participants who, during a program year, are in an education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains toward a credential or employment. **(Adult, Dislocated Worker, Youth)**

WIOA Wagner-Peyser Services Contracts		1st Quarter PY 20 7/1/20 - 9/30/20		2nd Quarter PY 20 10/1/20 - 12/31/20		
Rappahannock Goodwill Industries - Planning District 16 - George Washington Region						
31.54%	WIOA Wagner-Peyser	31.5%	\$ 34,458.67	Wagner-Peyser Expenditures	-	Wagner-Peyser Expenditures
			\$ 109,258.36	Total Contract		Total Contract
The SkillSource Group - Planning District 16 - George Washington Region						
9.86%	WIOA Wagner-Peyser	9.9%	\$ 1,971.69	Wagner-Peyser Expenditures	-	Wagner-Peyser Expenditures
			\$ 20,000.00	Total Contract		Total Contract
Job Assistance Center - Planning District 17 - Northern Neck Region						
46.91%	WIOA Wagner-Peyser	46.9%	\$ 19,251.62	Wagner-Peyser Expenditures	-	Wagner-Peyser Expenditures
			\$ 41,040.51	Total Contract		Total Contract
Job Assistance Center - Planning District 18 - Middle Peninsula Region						
37.62%	WIOA Wagner-Peyser	37.6%	\$ 20,273.32	Wagner-Peyser Expenditures	-	Wagner-Peyser Expenditures
			\$ 53,890.03	Total Contract		Total Contract
Job Assistance Center - Planning District 22 - Eastern Shore Region						
24.67%	WIOA Wagner-Peyser	24.7%	\$ 9,740.14	Wagner-Peyser Expenditures	-	Wagner-Peyser Expenditures
			\$ 39,489.54	Total Contract		Total Contract

Wagner Peyser Metrics		
Virginia Career Works - Bay Consortium		
Office - Rappahannock Goodwill Industries		
7/01/2020 - 9/30/2020		

Individuals		
Enrolled WP (PIRL)	Distinct Users	Services Provided
72	199	778

Employers		
New Registrations	Employers Served	Services Provided
3	31	123

Job Orders and Matching		
Job Orders	Job Openings	Job Notifications
8	9	358

Staff Efforts		
Outreach Emails	Outreach Calls	Referrals Sent
1902	258	7

Other		
Placements	Job Fairs/Hiring Events	Workshops
1	2	4

Wagner Peyser Metrics		
Virginia Career Works - Bay Consortium		
Office - SkillSource Group		
8/1/2020 - 9/30/2020		

Individuals		
Enrolled WP (PIRL)	Distinct Users	Services Provided
7	7	15

Employers		
New Registrations	Employers Served	Services Provided
N/A	N/A	N/A

Job Orders and Matching		
Job Orders	Job Openings	Job Notifications
N/A	N/A	N/A

Staff Efforts		
Outreach Emails	Outreach Calls	Referrals Sent
104	104	2

Other		
Placements	Job Fairs/Hiring Events	Workshops
2	3	2

Wagner Peyser Metrics		
Virginia Career Works - Bay Consortium		
Office - Job Assistance Center		
7/01/2020 - 9/30/2020		

Individuals		
Enrolled WP (PIRL)	Distinct Users	Services Provided
45 (23 MP, 22 NN)	49	181

Employers		
New Registrations	Employers Served	Services Provided
2	58 (20 MP, 15 NN, 23 ES)	166

Job Orders and Matching		
Job Orders	Job Openings	Job Notifications
134	321	357

Staff Efforts		
Outreach Emails	Outreach Calls	Referrals Sent
59	62	1

Other		
Placements	Job Fairs/Hiring Events	Workshops
5 (3 MP, 2 NN)	3 (1 MP, 2 NN)	0

Economic Equity Initiative Contract Expenditures													
		1st Quarter PY 20 7/1/20 - 9/30/20			2nd Quarter PY 20 10/1/20 - 12/31/20			3rd Quarter PY 20 1/1/21 - 3/31/21			4th Quarter PY 20 4/1/21 - 6/30/21		
47.16%	EEI Program	47.2%	\$ 40,799.02	EEI Expenditures	-		EEI Expenditures	-		EEI Expenditures	-		
			\$ 86,510.00	Total Contract			Total Contract			Total Contract			
Target Number of Participants													
	EEI Program	22.5%	9	# participants	-		# participants	-		# participants	-		
			40	Total			Total			Total			
Employment 2nd Quarter after Exit													
	EEI Program	9.1%	2	# participants	-		# participants	-		# participants	-		
			22	# exited			# exited			# exited			
Employment 4th Quarter after Exit													
	EEI Program	0.0%	0	# participants	-		# participants	-		# participants	-		
			28	# exited			# exited			# exited			
Credential Attainment within Four Quarters after Exit													
	EEI Program	6.7%	2	# credentialed	-		# credentialed	-		# credentialed	-		
			30	Total			Total			Total			
Training Completion													
	EEI Program	13.3%	4	# credentialed	-		# credentialed	-		# credentialed	-		
			30	Total			Total			Total			

Customer Survey

Customer Survey Results Northern Neck 1st Quarter PY20

What was the purpose of your visit?	Unemployment Claim	Workforce Resources	Resume Assistance	Job Search Activities	Resource Room	Workshops or Training	Gathering Informational Materials	Other	
<i>Number of Visitors:</i> 17	0	4	0	0	0	0	0	0	
Were your needs met?	Yes 4	No 0							
<i>Number of Visitors</i>									
Was the Staff Knowledgeable?	Yes 4	No 0							
<i>Number of Visitors</i>									
If the Staff was unable to meet your needs, were you provided contact information for partner agencies/resources?	Yes 1	No 2							N/A
<i>Number of Visitors</i>									
How helpful was the Staff during your visit to the Virginia Career Works Center?	1 (Poor) 0	2 0	3 (Average) 0	4 0	5 (Excellent) 4	Additional Comments: <ul style="list-style-type: none"> • Jean was a pleasure to work with. • The help was very useful and respectful staff. 			
<i>Number of Visitors</i>									
How would you rate your overall visit to the Virginia Career Works Center?	1 (Poor) 0	2 0	3 (Average) 0	4 0	5 (Excellent) 4				
<i>Number of Visitors</i>									

Customer Survey Results Middle Peninsula 1st Quarter PY20

What was the purpose of your visit?	Unemployment Claim	Workforce Resources	Resume Assistance	Job Search Activities	Resource Room	Workshops or Training	Gathering Informational Materials	Other	
<i>Number of Visitors:</i> 9	0	5	0	0	0	0	0	0	
Were your needs met?	Yes 5	No 0							
<i>Number of Visitors</i>									
Was the Staff Knowledgeable?	Yes 5	No 0							
<i>Number of Visitors</i>									
If the Staff was unable to meet your needs, were you provided contact information for partner agencies/resources?	Yes 2	No 0							N/A
<i>Number of Visitors</i>									
How helpful was the Staff during your visit to the Virginia Career Works Center?	1 (Poor) 0	2 0	3 (Average) 0	4 0	5 (Excellent) 5	Additional Comments: <ul style="list-style-type: none"> • Everything was more than informative and understandable. • David was very helpful and very knowledgeable. I appreciated him taking the time with me. 			
<i>Number of Visitors</i>									
How would you rate your overall visit to the Virginia Career Works Center?	1 (Poor) 0	2 0	3 (Average) 0	4 0	5 (Excellent) 5				
<i>Number of Visitors</i>									

Customer Survey Results Eastern Shore 1st Quarter PY20

What was the purpose of your visit?	Unemployment Claim	Workforce Resources	Resume Assistance	Job Search Activities	Resource Room	Workshops or Training	Gathering Informational Materials	Other
<i>Number of Visitors</i>	7	1	1	3	0	10	2	3
Were your needs met?	Yes	No						
<i>Number of Visitors</i>	20	7						
Was the Staff Knowledgeable?	Yes	No						
<i>Number of Visitors</i>	20	7						
If the Staff was unable to meet your needs, were you provided contact information for partner agencies/resources?	Yes	No	N/A					
<i>Number of Visitors</i>	27							
How helpful was the Staff during your visit to the Virginia Career Works Center?	1 (Poor)	2	3 (Average)	4	5 (Excellent)	Additional Comments: 1. UI processes stinks! 2. UI is worse than a nightmare! 3. This is frustrating. 4. Nobody answers the phone for UI questions. 5. Very helpful. 6. Friendly 7. Nice		
<i>Number of Visitors</i>			7	7	13			
How would you rate your overall visit to the Virginia Career Works Center?	1 (Poor)	2	3 (Average)	4	5 (Excellent)			
<i>Number of Visitors</i>			5	9	13			

Success Stories

Rappahannock Goodwill Industries Success Story – George Washington

JJ came to the WIOA program to pursue her CDL Class A. JJ was working as a patient care aide and wanted an opportunity to make more money to provide for her family. JJ had five children and a great support system at home.

WIOA staff and JJ spoke at length about the need for new truck drivers to get over-the-road training before working more local routes. JJ was adamant and motivated to become a driver and agreed that she wanted to go over-the-road. JJ entered training after passing her drug screen and physical and then completed the in-class portion of the training.

However, when she went to take the test for her CDL Class A learner's permit, JJ found out during her permit testing appointment that she had a medical condition that made it so she would not be cleared for her permit test. JJ was extremely upset and the WIOA staff supported her and encouraged her to follow-up with a doctor about treatment. This medical issue delayed her permit testing and her training for several months. She was sent to a specialist to receive treatment for the medical concern. The WIOA team kept JJ's spirits up and continued to support her until the specialist deemed the medicine and therapy a success. JJ was able to get approval from her doctor and the DMV to retake her permit test.

She continued her course until Covid-19 struck and she once again found her training delayed. She was at the very end of her road training when CDS shut down for a short period of time. WIOA staff continued to support JJ through this uncertain time, assisting her with job search and narrowing down potential companies that she wished to apply for and editing her resume to fit her new skillset. CDS reopened to individuals who needed their testing completed and had made agreements with the DMV to do the license testing on-site. JJ was able to complete her training and take her test in order to obtain her license.

JJ passed with flying colors and was hired immediately by a transport company. She has been making trips across the US to the West Coast and back transporting vehicles and machinery. She takes one trip per week and is home with her family on weekends. She is extremely happy with the position and the compensation she receives per trip has allowed her to provide fully for her family and even start planning for the future.

Despite her medical setbacks and Covid-19 putting delays in her training, JJ is successful.

Rappahannock Community College Success Story - Northern Neck

In September 2019, E. came into RCC and applied to WIOA. She is a single mother and met all priority of service guidelines. E. was not employed and was interested in RCC's "Principles of Hospitality and Tourism" program. She was enrolled, began her training in October and completed it in November 2019. She was an excellent student and earned five certificates, all of which focused on customer service. Those certificates were:

- Certified Guestroom Attendant

- Certified Restaurant Server
- Certified Front Desk Representative
- Certified Guest Service Professional Golden Opportunities
- Certified Guest Services Professional Making Connections

E. is now employed at Food Lion as a cashier and will be cross training in other departments. I feel certain that her customer service excellence will serve her well in whatever career she may have.

Rappahannock Community College Success Story – Middle Peninsula

LL came to the Workforce Development Office seeking training in welding. LL was the single father of four children and sharing an apartment with his father. LL was not working and faced barriers to employment, as he had unreliable transportation. LL was eligible for and enrolled in the WIOA program to provide the occupational skills training he needed. LL attempted to get employment as a welder with a local trailer manufacturer to work at night and get his training during the day at a nearby welding training center. Soon after LL's employment offer his means of transportation fell through and he was unable to go to work. LL was able to find transportation from a neighbor, however, to continue his occupational skills training even though he was not working. LL completed two of his welding classes before once again experiencing transportation issues causing him to miss his third welding session. LL was able to get his transportation squared away as he purchased his own vehicle and enrolled in the next available welding class. LL gained employment with a union in Richmond, VA that agreed to provide him training for his remaining credentials needed. LL completed 3 out of 5 classes in the RCC welding program and states he would never have gotten the union job without having gained credentials in those three areas. LL stated that the employer saw his training as a plus and deciding factor in hiring him. LL expressed sincere appreciation that his training and the WIOA grant enabled him to go from unemployed father of four to acquiring a union job in his career field.

Eastern Shore Community College Success Stories – Eastern Shore

Story #1

BB is an Adult who has just completed her C.N.A. training. BB came to the program wanting a change of career after working at a fast-food chain for a couple of years. BB knew that nursing was the field that she wanted to complete. Despite the interruption of COVID-19, BB still managed to complete her hours to sit for the state boards. BB has passed her C.N.A. state board test and now has a C.N.A. license. BB is a single mother with 2 kids and now has career where she can support her kids. BB now has a job as C.N.A.

Story #2

CC worked for a home improvement company for twenty-six years, but due to a drastic lull in business the company was forced to close its doors. That led CC to relocate to the Eastern Shore. CC secured a job as a technician in the electrical department for a rendering and recycling company where he worked for approximately twenty years as the lead electrician. After CC was notified that the company would be closing, he visited the local Virginia Employment Commission. As a dislocated worker he was referred to the WIOA program for services. CC enrolled in and completed electrical training at Eastern

Shore Community College in 2019, purchased a business license and opened his own home improvement business. At his follow-up interview, CC reported that his home improvement business is growing and that required him to hire two full-time and two part-time staff. One of the part-time staff is a master electrician and the other part-time staff is a journeymen electrician. CC is learning more electrical skills and studying to take the electrical licensure examination in the spring of 2020. CC promised to keep us posted on his progress.

SkillSource Group Youth Success Story – George Washington

NN is a 23-year-old male who enrolled in The Bay Consortium WIOA Youth Program in October 2018, while working in the fall pumpkin patch, Miller Farms, in Spotsylvania County. He had a high school diploma, and badly wanted a career, but was not sure how to get there. He was interested in working outside, possibly construction or even as a game warden. One of the Partner staff at the Fredericksburg Workforce Center referred him to the SkillSource program for young adults.

NN was very happy to hear that the program offered career readiness and help with job search. He soon attended computer classes offered through the Center at Goodwill. He participated in a Leadership Seminar facilitated by the program's Project Director and a Financial Workshop facilitated through United Way. His confidence continued to increase.

He worked with his Case Manager on a current resume and attended a large job fair at the Center 3 weeks into the program. NN was a very pleasant, positive young man, who simply had some learning disabilities with an IEP in high school. He also struggled with anxiety and needed help finding and following the right path.

He was hired on the spot at the job fair by a home improvement company, who were impressed with NN's demeanor and his sense of a strong work ethic. Over his period of employment, the owner of the company called the Case Manager twice to let her know he had given NN a raise due to his hard work.

NN worked for 1 ½ years and decided to look for another opportunity where there could be a chance for advancement, since this company was relatively small. He called his Case Manager and worked on a resignation letter He applied and was interviewed and hired quickly by Stafford County in the Transportation Department. His job was to make repairs and check systems equipment throughout the county. To start he received higher amount of pay per hour than in the job he held. This salary provided him with the opportunity to move into his apartment and to be self- sufficient.

NN worked for the County for one year and was ready to apply for a better position when he received a call from a Federal Government contractor to interview for a Security Technician, to install secret security equipment in government facilities. From his past work experiences, coupled with glowing references and a great interview, rewarded NN with a job offer at double the pay he was currently bringing home. His Security Clearance is now being processed and he has noted he thinks he has found his career.

NN still "checks in" monthly with his WIOA Youth Case Manager because he states, "I find myself calling her when I need advice, or to give her new information, or just because the paperwork said I had to...."

Rappahannock Community College Youth Success Story – Northern Neck

K. began taking classes part-time at RCC in the fall of 2013. She continued until the spring of 2016, after which it became too expensive to continue. Although her husband and her made too much income to qualify for financial aid, her medical and other related expenses did not leave enough money to pay for tuition and books. Despite her 3.45 GPA, she could not afford to continue to pursue her education. In 2019, the youth case manager became acquainted with K. within the community and learned that she was pregnant with her first child. K. had commented on social media that she desired to return to college and was determined to do so one day. After some discussion, K. enrolled in the Youth WIOA Program. She had completed about 60% of her degree at that time. She is now on track to graduate in the summer of 2021. She currently has a 3.47 GPA, cares for her young child and has created a small home business. She is looking forward to participating in a work experience in the near future. K. has even decided to pursue a bachelor's degree online upon graduation from RCC as well as pursue employment. CM is working with K. to research schools and apply for scholarships. This young lady has the intelligence and determination to go far.

Rappahannock Community College Youth Success Story – Middle Peninsula

In the beginning of March, B. was brought into the WIOA office by his former bus driver/friend. He is a former foster child and his bus driver had befriended him and provided some guidance in his life. She encouraged him to learn a trade. He currently works as a laborer but showed much interest in becoming a welder and working at the shipyard someday. The case manager worked with the college but was informed that he would not be eligible for the college's Great Expectations foster student program. Thus, after completing the required paperwork and assessments, B. was enrolled in WIOA and placed in shielded metal arc welding (SMAW). His instructor and case manager remained in communication and B. was doing quite well in class. However, not long after the course began, it was paused due to COVID-19. B. waited patiently for class to resume. The case manager worked with B. during the pause to provide community resources and job fair information. Finally, he was able to resume, and complete, his SMAW welding course. He made friends with two other Youth WIOA participants and they supported each other throughout the course and break. He is now enrolled in gas metal arc welding and is excited for that course to begin in early October. B. has the desire and ability to be successful and now also has new friends and the case manager to encourage him along the way.

Eastern Shore Community College Youth Success Stories – Eastern Shore

Story #1

I began working with BM in the fall of 2019. She had a rough couple of years in high school but she was determined to make her senior year the best she could-of course until COVID hit. BM had several classes online in addition to her school classes. She passed them with no problem. In addition, she was working at a local restaurant and helping out her mom who had some health issues.

BM graduated from high school, spending the last three months of school completing classes virtually due to the pandemic. We completed her application so that she could attend ESCC for Medical Assisting and she registered for fall classes.

She also applied for a second job at Dollar General and is waiting to hear back. She has a great work ethic and is trying to juggle everything on her plate.

Story #2

AA is an OSY who completed her Medical Assistant and graduated in August. AA was working for a chicken plant and decided to do something different. She enrolled last fall completed all of the requirements despite COVID-19. AA graduated from the program and has a few hours left to complete before she obtains her Medical Assistant degree. She has a job opportunity in order after she completed her remaining hours.

Bay Consortium Workforce Development Board, Inc.

Labor Market Committee Meeting

Draft Meeting Minutes

Thursday, October 15, 2020

2:00 p.m.

The Labor Market Committee met Thursday, October 15, 2020 via Zoom.

Call to Order: Melvin Carter called the Labor Market meeting to order at 2:00 p.m.

Roll Call: Present was Melvin Carter, Meg Bohmke, and Jean Fraysse. Not present was David Mann, Greg Moon, and Louis Belcher. In addition, was present Jackie Davis, Steven Golas, and Katlyn Moss. A quorum was present.

Approval of Minutes: The minutes from the January 8, 2020 meeting were tabled.

Public Input: There was no public input.

New Business: Katlyn Moss presented members with MAB Institute for the Eligible Training Provider List. Jean Fraysse asked if the Board ever received feedback on the training providers, and Jackie Davis stated that case managers received all feedback on the training providers and passed it along to staff. A motion was made to approve MAB Institute and send to the full Board for approval, which was seconded and approved. Steven Golas reviewed the Incumbent Worker Policy with members. He noted that it had been updated to realign definitions with the state policy. Jean Fraysse asked questions about employee eligibility criteria. A motion was made to approve the Incumbent Worker Policy and send to the Board for approval, which was seconded and approved. Steven Golas reviewed the Individual Training Account Policy with members, noting that the timelines and employment increase had been updated, as well as the O-Net link. A motion was made to approve the Individual Training Account Policy and send to the Board for approval, which was seconded and approved. Steven Golas reviewed the Unlikely to Return to Previous Occupation or Industry Policy with members. He noted that it was updated to include revisions due to COVID-19. A motion was made to approve the Unlikely to Return to Previous Occupation or Industry Policy and send to the Board for approval, which was seconded and approved. Jackie Davis also discussed Chair and Vice Chair nominations with members. Jean Fraysse was elected Chair and Melvin Carter was nominated as Vice-Chair.

Old Business: Jackie Davis went over the strategic priorities. Jean Fraysse discussed having a meeting with a few Board members and partners to create a common message and marketing materials. Meg Bohmke suggested reaching out to areas who are similar in size to find out how they handle funding and area management.

Other Topics: Jackie Davis mentioned that the next Board meeting would take place on November 4, 2020 at 11 a.m. via Zoom. She noted that the State would like a new local plan created and would be providing money for a new strategic plan to be created, in which they had contracted with Lori Strumpf to write. Meg Bohmke asked how Lori Strumpf had been procured and how much money was budgeted. Jackie Davis let her know that \$12,000 was budgeted for the creation of the plans, and another workforce area had procured Lori Strumpf and they were using the same procurement.

There being no further business, the meeting was adjourned at 2:45 p.m.

Respectfully submitted,
Katlyn Moss

Bay Consortium Workforce Development Board

Policy Number: 15-02
Effective Date: May 6, 2016
Revised Date: November 4, 2020
Title: Incumbent Worker Training

PURPOSE

The purpose of this policy is to provide procedures and guidance on Incumbent Worker Training requirements, appropriate data entry, and performance measure reporting. This guidance applies to incumbent worker training programs that receive funding through incumbent worker training contracts with an employer that are supported by the Workforce Innovation and Opportunity Act (WIOA) Title I-B local formula funds to train adults and dislocated workers, including those with disabilities.

It is crucial for the BCWDB to promote a highly-skilled and job-ready workforce that meets the needs of employers. The BCWDB ensures that workforce development services for the existing workforce are coordinated and designed for rapid access to the range of employer assistance available through statewide and local initiatives. The BCWDB recognizes that improving the education and skill levels of the current workforce will not only improve state and local economies, but will also increase the ability of businesses to effectively compete in the global market. WIOA funds may be expended for incumbent worker training (WIOA section 133(b) (4)).

WIOA funds will be made available through a process designed to assist Virginia businesses, which could include a single firm or a group of firms that share similar workforce needs, using a sector strategy approach to meet the skills training needs of their incumbent workforce.

REFERENCES

- Virginia Board of Workforce Development Policy No. 403-04, Incumbent Worker Training
- Virginia Board of Workforce Development Policy No. 404-01, Identification of Eligible Providers of Occupational Skills Training
- Workforce Innovation and Opportunity Act, Sections 122, 133 and 134
- Training and Employment Guidance Letter (TEGL) No. 10-16, Performance Accountability Guidance for WIOA Title I, Title II, Title III, and Title IV Core Programs
- Workforce Innovation and Opportunity Act; Employment and Training Administration; Labor Final Rule, Subpart F-Work-Based Training Sections 680.700 through 680.840

- Training and Employment Guidance Letter (TEGL) No. 10-16, Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA) Title I, Title II, Title III and Title IV Core Programs
- Training and Employment Guidance Letter (TEGL) No. 19-16, Guidance on Services provided through the Adult and Dislocated Worker Programs under the Workforce Innovation and Opportunity Act (WIOA) and the Wagner-Peyser Act Employment Service (ES), as amended by title III of WIOA, and for Implementation of the WIOA Final Rules

DEFINITIONS

Incumbent Worker is an employed individual, who is:

- at least 18 years of age;
- a paid, full-time employee of the applicant's business working at a facility located in Virginia;
- a citizen of the United States or a non-citizen whose status permits employment in the United States, who has registered for selective service as appropriate;
- meets the Fair Labor Standards Act requirements for an employer-employee relationship;
- who has an established employment history with the employer for 6 months or more; and
- recommended by their current employer for Incumbent Worker Training in order to address changes in the necessary skills to remain in their position, to remain in their company, or avoid a layoff.

Incumbent Worker Training (IWT)

IWT 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 the 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.

Individual vs. Participant for Reporting Purposes: See WIOA Final Rules for Definition

Because of the unique nature of the Incumbent Worker Training Program, where the Local Workforce Development Board 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 adult or dislocated worker programs, unless they are also receiving other services under those programs.

Therefore, individuals who only receive incumbent worker training and no other WIOA Title I service do not fall within the definition of "participant" in 20 CFR 677.IS0(a).

As such, those that are receiving only Incumbent worker training, shall be reported as an "Individual" and not a WIOA Program Participant for purposes of our reporting.

Program Year

Is the period that runs from July 1 through June 30 of the subsequent year.

Recognized Postsecondary Credential (RPC)

RPC is a credential consisting of an industry-recognized certificate or certification, a certificate of completion of an apprenticeship, a license recognized by the Commonwealth of Virginia or the Federal Government, or an associate or baccalaureate degree.

Virginia Workforce Connection (VaWC)

VAWC is the System of Record for the WIOA Title I programs in the Commonwealth of Virginia.

BACKGROUND

The Virginia Board of Workforce Development (VBWD) Policy No. 403-04: Incumbent Worker Training provides criteria for the Bay Consortium Workforce Development Board (BCWDB) for implementing the Incumbent Worker Training requirements in the Workforce Innovation and Opportunity Act of 2014 for the Commonwealth of Virginia.

Incumbent worker training is intended for workers who have an established work history with the current employer and the knowledge, skills, and abilities needed by their current employer, but now need additional training to advance in the company, creating backfill opportunities, or avoid a layoff. Incumbent workers are employed at the time of their participation, and the incumbent worker training contract funds are paid to the employer for training provided to the incumbent worker either to avert a lay-off or otherwise retain employment.

Incumbent worker training is targeted to improving the skills and competitiveness of the participant and increasing the competitiveness of the employer. The training should be high quality and, wherever possible, allow the participant to gain industry recognized training experience and ultimately should lead to an increase in wages.

Strategies for developing new workforce skills in the existing workforce shall be designed, using a sector strategy approach, to benefit business, industry and the employee in ways that encourage and support the integration of new technology and business processes, increase employee productivity, support the competitiveness of the company, and provide incumbent workers with opportunities for advancement and wage gains within their company.

The Training and Employment Guidance Letter (TEGL) WIOA No. 10-16, in accordance with WIOA sec. 122 and 134, explains the requirements in order to utilize WIOA Title 1-B funds for incumbent worker training.

Based on the WIOA, TEGL No. 10-16 and the VBWD Policies No. 403-04 and No. 404-01, the WIOA Title I Administrator, Virginia Community College System-Workforce Development Services (VCCS-WDS) has developed the following guidelines and procedures for the BCWDB Incumbent Worker Training activities effective July 7, 2017.

GUIDANCE

Incumbent Worker Employer Eligibility

In accordance with VBWD Policy No. 403-04 employer eligibility criteria, the Bay Consortium Workforce Development Board (BCWDB) is expected to include the following criteria:

- Demonstration of linkages of the training activity to demand occupations and/or regionally targeted industries;
- 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); and
- The potential state and regional economic impact, if any, of the training project.

Employers must be:

- Private Sector, being Private-for-profit businesses or private non-profit organizations with under 250 employees;
- Operating in the Commonwealth of Virginia during the entire twelve-month period prior to the application date, with at least one employee other than the owner if the employer entity a private business;
- Current on all Virginia tax obligations, including all applicable county, city and local taxes; and
- Proposing to deliver the training for employees based within Virginia.

The following employers are NOT eligible to participate:

- Public Sector employers;
- A business that has a history or pattern of failing to provide WIOA participants with continued employment with wages, benefits, and working conditions that are equal to those provided to regular employees who have worked a similar length of time and are doing the same type of work.
- A business or part of a business that has relocated from any location in the United States, until the company has operated for 120 days, if the relocation has resulted in any employee losing his or her job at the original location.
- A new or expanding business must verify whether it has relocated employment from another area, and must indicate whether any employee lost a job in the previous location as a result of the relocation.
- A standardized pre-award review must be completed and documented jointly between the local area and the business establishment as a prerequisite to training.
-

Prohibition on Use of Funds to Encourage or Induce Relocation

No funds provided under this title shall be used, or proposed for use, to encourage or induce the relocation of a business or part of a business if such relocation would result in a loss of employment for any employee of such business at the original location and such original location is within the United States.

Restrictions on Use of Funds after Relocation

No funds provided under this title for an employment or training activity shall be used for customized or skill training, on-the-job training, incumbent worker training, transitional employment, or company-specific assessments of job applicants or employees, for any business or part of a business that has relocated, until the date that is 120 days after the date on which such business commences operations at the new location, if the relocation of such business or part of a business results in a loss of employment for any employee of such business at the original location and such original location is within the United States.

Incumbent Worker Employee Eligibility

At a minimum, any individual being served in an incumbent worker training program must meet the general criteria below:

- At least 18 years of age;
- A citizen of the United States or a non-citizen whose status permits employment in the United States;
- Males born on or after January 1, 1960 must register with the selective service system within 30 days after their 18th birthday or at least before they reach the age of 26;
- Meet the Fair Labor Standards Act requirements for employer-employee relations and have an established employment history with the employer for 6 months or more; and
- An employee to be trained that works at a facility located in Virginia or working for a staffing agency and placed at a Virginia facility.

Note, if the incumbent worker is receiving WIOA Adult or Dislocated Worker services in addition to incumbent worker training, the individual must also meet the additional program

specific eligibility requirements like all other adult or dislocated worker participants and will be counted in local program performance.

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 6 months or more as long as a majority of those employees being trained meet the employment history requirement.

Individuals receiving incumbent worker training are subject to selection for the federally mandated data validation. Therefore, documentation must be available to support incumbent worker eligibility requirements (See Attachment B).

Additional Criteria

For an employer, and their employees, to receive incumbent worker funds in support of training activities, the BCWDB must consider the characteristics of the individuals in the program with regard to the training requirements; the relationship of the proposed training to the competitiveness of the participant and the employer; and, other factors the Board may determine appropriate, including number of employees trained, wages and benefits including post training increases, and the existence of other training opportunities provided by the employer when determining to do Incumbent Worker Training with an Employer.

Training activities may include, but not be limited to, Occupational Skills Training, Skill Upgrading and Retraining, Literacy Activities related to Basic Work Readiness, Job Readiness Training or Work Readiness Training, and Customized Training. In instances where Customized Training is offered under this policy, provisions under State Policy #15-00 shall also apply. The local area must monitor against those provisions after the training is complete and maintain documentation of such monitoring.

Training services under local initiatives may be provided through Virginia's community colleges, school districts, area vocational-technical centers, state universities, licensed and certified post-secondary private institutions and from subject matter experts, consultants, or trainers from the applying business. Employers should be encouraged to use the State approved Eligible Training Providers List. Training can be conducted at the employer's facility, at the training provider's facility, or at a combination of sites.

Proposed training costs must be reasonable and necessary and clearly relate to the purposes and activities of the project as described. Businesses must provide a match as designated on the Employer Portion of the training-related costs. Funds provided through this effort are not intended to supplant training normally provided by employers. Local areas are encouraged to leverage resources from multiple public and private resources within the community; however, activities funded by these WIOA dollars cannot duplicate efforts funded by other such sources.

Examples of allowable activities and expenses:

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

Activities NOT eligible for funding:

- 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

- Direct Employee wages

Funding and Data Entry

There is no distinct "Incumbent Worker Program," as local funds and statewide rapid response funds are available to provide incumbent worker training.

The options for funding incumbent worker training are as follows (with no state priority assigned):

- Adult Local Formula Funds
- Dislocated Worker Local Formula Funds
- Statewide Rapid Response Funds

The BCWDB may reserve and use up to 20 percent of the WIOA Title I Adult and Dislocated Worker funds allocated to the local area to pay for the Federal share of the cost of providing a training program for incumbent workers. The BCWDB shall determine the appropriate funding stream for local formula funds based upon the needs of the employer and the area. Incumbent worker training should, wherever possible, allow the participant to gain industry-recognized training experience and a recognized post secondary credential.

Incumbent worker training recipients must adhere to the procurement standards set forth by the Uniform Guidance. Allowable costs of incumbent worker training are consistent with the allowable costs rules for all types of training.

Data Entry

Specific data entry requirements are located in Attachment A.

Non-Federal Share - Employer Portion

Employers participating in the program are required to pay for the non-Federal share of the cost of providing the training to incumbent workers of the employers in accordance with VBWD Policy No. 15-00.

Employers participating in the program are required to pay for the Employer portion of the cost of providing the training to incumbent workers of the employers.

The Employer portion 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 Employer portion provided by an employer participating in 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. The employer may provide the share in cash or in-kind, fairly evaluated. The Employer portion may not be federal funds.

The BCWDB shall ensure contracts with employers provide sufficient information to include participants in reporting (see below).

Incumbent Worker Training Documentation

The BCWDB has the responsibility for receiving, reviewing, and approving employer applications for participation in Incumbent Worker Training. The BCWDB is responsible for developing and maintaining the Incumbent Worker contract with the employer. The boards must ensure that data elements related to employee demographics, eligibility, training and attainment of desired skills or industry recognized credential, and performance are entered into the Virginia Workforce Connection, the supported state system of record.

The BCWDB is required to maintain all documentation received and reviewed for the minimum required retention period of three years. Documents that must be retained include:

- completed and signed application
- completed and signed contract
- documentation or certification of employee eligibility (see attachments for forms that may be used)
- training plans if separate from the application
- copies of credentials received or employer certification of training completion
- a copy of the invoice from the training provider
- a copy of the employer's payment made to the training provider
- a completed reimbursement request form
- a signed form indicating that the employer has been made aware of the local area's Grievance and Equal Opportunity Policies
- all documentation regarding IWT related complaints and actions taken on those complaints.

The required file format for IWT contracts, for both individual and cohort contracts, shall include the information noted above with a note of the location of the participant file for each individual co enrolled in a WIOA Adult or Dislocated Worker Program. Please note that the IWT file contains PII (personally identifiable information) and should be handled accordingly.

All documentation collected and maintained will be subject to validation during the auditing, monitoring and data validation processes.

Program Performance Reporting

The BCWDB is required to enter all individuals receiving WIOA Title I funded incumbent worker training into the VaWC and to report outcomes on all individuals who receive incumbent worker training.

For individuals in incumbent worker training, outcome measures will be determined based on BCWDB incumbent worker training program design and data entry (Attachment A, and Attachment C). Attachment C includes data elements required for reporting of Incumbent Worker Training, for example, measurable skill gains, credential attainment, and post-program employment. If local formula funds are used, the incumbent worker must have an adult or dislocated worker classification, as specified in Attachment A, Section 11.

The primary data elements that are used to collect and report incumbent worker training to the federal government are as follows:

- Participant Information Record Layout (PIRL) Data Element 907 - Recipient of Incumbent Worker Training
- TEGL 10-16 Attachment 8 Incumbent Worker Training Required Data Elements (Attachment C)

Business Services

Incumbent worker training is an important business services initiative that is designed to benefit business and industry by assisting with existing employees' skill development and by increasing employee productivity and company growth. The BCWDB will detail incumbent worker training in the business services plan. Incumbent worker training will be tracked in the business engagement report and be reported to the Virginia Board of Workforce Development.

Outcomes

Strategies for developing new workforce skills in the existing workforce shall be designed to benefit business and industry in ways that encourage and support the integration of new technology and business processes, increase employee productivity and support the competitiveness of the company. Incumbent worker programs create a number of positive outcomes including:

- Improving the alignment of existing workers' skills with new job requirements;
- providing individuals access to new career opportunities within a business;
- encouraging the retention of existing personnel who otherwise may become dislocated because of skills deficiencies; increasing the wages of newly trained workers;
- creating new opportunities for entry-level workers through the promotion of existing workers; and supporting the overall enhancement of local and regional economic development efforts.

Attachment A

Desk Reference Checklist for Incumbent Worker Training Data Entry Process

Incumbent Work Data Entry Process Link:

https://viriniacareerworks.com/wp-content/uploads/VWL-16-05-Change-1-Attachment-A-IWT-Data-Entry-Process-.pdf#new_tab

Attachment B

Incumbent Worker Eligibility Documentation

Incumbent Worker Eligibility Documentation Link:

https://virginiacareerworks.com/wp-content/uploads/VWL-16-05-Change-1-Attachment-B-Incumbent-Worker-Training-Eligibility-Docummentation_7-7_2017-002.pdf#new_tab

Attachment C

Incumbent Worker Training Required Data Elements

Incumbent Worker Training Required Data Elements Link:

https://virginiacareerworks.com/wp-content/uploads/VWL-16-05-Change-1-Attachment-C-IWT-Required-Data-Elements.pdf#new_tab

Bay Consortium Workforce Development Board

Policy Number: 00-02
Effective Date: July 19, 2000
Revised Date: November 4, 2020
Title: Individual Training Account Policy

PURPOSE

The purpose of training is to provide eligible customers with the means to obtain the necessary skills to become gainfully employed or re-employed. This policy is intended to define and establish parameters for Individual Training Accounts (ITA) and On –The – Job Training (OJT) development and expenditures.

REFERENCE

Workforce Innovation and Opportunity Act of 2014 Section 129(c) (2)(D);
20 CFR 680.230; and
20 CFR 681.550

BACKGROUND

WIOA Title I training services for WIOA eligible adults, dislocated workers and youth are provided through ITAs. WIOA Providers using ITA funds, assist WIOA eligible adults, dislocated workers and youth purchase training services from eligible training providers they select in consultation with a Career Services Specialist. Participants are expected to utilize information such as skills assessment, labor market conditions/trends, and training providers' performance, and to take an active role in managing their employment future through the use of ITAs.

ITAs are allowed for out-of- school youth ages 18-24, ITAs for in-school youth ages 18-24 are not allowed they must be co-enrolled in the adult program (out-of-school youth ages 16-17 are not eligible for ITAs) per WIOA Section 129(c)(2)(D) and 20 CFR 681.550.

POLICY

Fund of Last Resort: WIOA funds are to be used for training only after the customer has been deemed ineligible for assistance from other sources of funds to pay for training, including Pell Grants, or any other federal, state, or local grants available through the One Stop Service Delivery System. WIOA funds may be used to enroll clients in the first semester of classes if the time frame for application and award of other grants preclude enrollment in a timely manner. Case managers shall include documentation of pursued options for alternate funding in the client's file. If eligible for other funding, continued enrollment and training shall be paid for with funds other than WIOA funds.

Dollar limits: The maximum training benefit per customer shall be \$4,000 per participant. This limit does not include funds required for accommodations for disabilities, such as interpreters, but includes only the fees for tuition and supplies directly applicable to training and employer reimbursement for on-the-job and/or customized training. Exceptions to the maximum training limit may be granted with prior approval. Consideration of an exception requires the submission of a written request presenting documentation and rationale. Exceptions up to \$6,000 per customer may be approved by BCWDB staff. Exceptions over \$6,000 require the approval of the Executive Director.

Duration: Customers must complete training funded with WIOA funds within a 24-month period from the time training begins. BCWDB staff may approve exceptions to this time limit for clients in degree programs for occupational training to respond to shortages in the community.

In Demand Occupations: Training can be provided in occupations in demand on the attached list below.

BCWDB In Demand Occupation List

Every Bright Outlook occupation matches at least one of the following criteria:

- Projected to **grow much faster than average** (**employment increase of 7% or more**) over the period **2020-2028**
- Projected to **have 100,000 or more job openings** over the period **2020-2028**
- **New & Emerging** occupation in a high growth industry
- Web Link for O-Net [Bright Outlook Occupations](#)

Bay Consortium Workforce Development Board

Policy Number: 18-01
Effective Date: August 3, 2018
Revised Date: November 4, 2020
Title: Unlikely to Return to Previous Occupation or Industry Policy

PURPOSE

To establish criteria for the Unlikely to Return aspect of eligibility for the WIOA Dislocated Worker program.

REFERENCE

Workforce Innovations and Opportunity Act of 2014 Sec. 3(15)(A)(iii)

POLICY

Evaluation and documentation of the status known as “Unlikely to Return to Previous Occupation or Industry” is required by the Local Workforce Development Area. The evaluation must be based on a review of a number of criteria below:

To determine “unlikely to return” to previous industry or occupation, the applicant must fall into one of following:

- The applicant worked in a declining industry or occupation as documented on a list developed by the state or local area.
- There are limited job orders in the area at the time of application.
- The applicant does not have the necessary skills for re-entry into his/her former occupation.
- The applicant has applied for positions, consistent with unemployment insurance qualification requirements, in their previous industry/occupation within the six months prior to application and has not been offered suitable employment.
- The applicant is unable to return to previous industry/occupation because of an injury, disability or other physical limitation as documented by a medical professional.
- The applicant is unlikely to return to the previous industry or occupation due to a change in family circumstances that require higher income.
- Automation of previous job.
- Significant variance to normal seasonal employment patterns, including loss of wages due to a natural disaster.
- An applicant who is an “Unemployment Insurance Claimant” and who has been profiled as “likely to exhaust benefits” is to be considered as “unlikely to return”, such as an individual

who has been required to attend a Reemployment Services and Eligibility Assessments (RESEA) meeting.

- Veterans transitioning from the military with a discharge that is anything other than dishonorable, are automatically considered “unlikely to return.”
- An applicant who has been furloughed or temporarily laid off for a minimum of 12 weeks with no return to date provided by the employer.

Documentation is required to determine that the job seeker is unlikely to return to the previous occupation. Documentation should include the Unlikely to Return Analysis form developed by Bay Consortium Workforce Development Board, but can also include an employer letter, disability confirmation, local area demand occupation determination, skills assessment documentation and any other that substantiates the status of unlikely to return to occupation.

Bay Consortium Workforce Development Board, Inc.
Board Development Committee Meeting
Draft Notes
Wednesday, October 14, 2020
11:00 A.M.

The Board Development Committee met Wednesday, October 14, 2020 via Zoom.

Call to Order: Danielle Robinson called the meeting to order at 11:00 am.

Roll Call: Present were Danielle Robinson and Patrick Tompkins. Not present was Josh Gemerek, Bill Leyden, Kelvin Pettit, Jason Perry, and Leigh Ramos, Also present was Jackie Davis and Katlyn Moss, WDB Staff. A quorum was not present.

Approval of Minutes: The minutes from the July 17, 2020 meeting were tabled.

Public Input: There was no public input.

New Business: Committee elections were tabled until next meeting due to lack of quorum.

Old Business: Jackie Davis reviewed the updated Strategic Priorities with members and asked for feedback. Danielle Robinson suggested the Board members provide information on their outreach connections and sharing success stories with partners. Patrick Tompkins suggested a joint event between partners and Board of Supervisors members to share information and having partners present at Local Elected Officials meetings. Jackie Davis reviewed the Board Membership with members, stating that Board was not certified and missing members, though there were a few members that were waiting on County approval to join the Board. Patrick Tompkins suggested tourism as a Business representative for the Eastern Shore, and he would reach out to Bay Creek to see if they would be interested in serving. Jackie Davis reviewed the Board Manual with members, noting that she would like to add policies and links to support duties. Patrick Tompkins suggested adding location descriptions for the policies in the manual in case links go down.

Other Topics: Jackie Davis noted that the next Board meeting would be November 4, 2020 at 1 am via Zoom.

There being no further business, the meeting was adjourned at 11:30 a.m.

Respectfully submitted,
Katlyn Moss

**Youth Council
Draft Minutes
Monday, October 26, 2020
10:00 a.m.**

The Youth Council met Monday, October 26, 2020, via Zoom.

Call to Order: Marjorie Lampkin called the Youth Council Meeting to order at 10 a.m.

Roll Call: Present were David Ferguson, Tina Taylor, Butch Gross, and Hutt Williams. Not present were Steve Smith, Marjorie Lampkin, and Joy Corprew. In addition, present were Jackie Davis, Steven Golas, and Katlyn Moss, WDB Staff.

Approval of Minutes: A motion was made to approve the minutes from the July 27, 2020 meeting, which was seconded and approved.

Public Input: There was no public input.

New Business: Steven Golas went over the quarterly reports. He stated that he was still waiting to receive the goals for the Measurable Skills Gain requirement. He noted that Rappahannock Community College had not enrolled any new clients on the Middle Peninsula this quarter, as well as not currently serving any clients from King and Queen County, King William County, Mathews County, and Middlesex County, and they would receive a letter requesting a Corrective Action Plan. Jackie Davis reviewed the Youth Incentive Policy with members, noting that the state had reviewed and asked for more consistency among the incentives. A motion was made to send the Youth Incentive Policy to the Board for approval, which was seconded and approved. Steven Golas discussed the Economic Interest Statements with members. Jackie Davis reviewed the Request for Proposals (RFPs) with members, noting that the plan was to release the RFPs earlier to ease the transition if a change in providers occurs. A motion was made to send the Request for Proposals to the Board for approval, which was seconded and approved, with Hutt Williams and Tina Taylor abstaining.

Old Business: There was no old business.

Other Topics: There were no other topics for discussion.

There being no further business, the meeting was adjourned at 10:30 a.m.

Respectfully submitted,
Katlyn Moss

Bay Consortium Workforce Development Board

Policy Number: 20-01
Effective Date: February 5, 2020
Revised Date: November 4, 2020
Title: WIOA Youth Incentive Policy

PURPOSE

The purpose of this policy and procedure is to establish guidelines for the provision of incentives for youth for recognition and achievement of goals that are tied to individualized career activities.

REFERENCE

- Reference P.L.113-128 Workforce Innovation and Opportunity Act (WIOA) sections 129 and 150.
- 20 CFR § 681.640,650
- 2CFR 200.302 (b)(4) & 303
- TEGL 8-15

YOUTH INCENTIVE

Incentives are designed to encourage successful participation in youth program activities. These incentives must support the goals of BCWDB Youth programs as documented in the client's Individual Services Strategy (ISS). Goals and/or training outcomes eligible for an incentive must be linked to an achievement related to training, employment, work readiness skills, occupational skills and/or basic skills attainment goals as stated in the client's ISS and documented in accordance with applicable WIOA regulations. Incentives will be in the form of a check or other documentable means (i.e. gift card without fees). Under no circumstances may a client be given cash. These incentives are intended to recognize the youth's achievements in an activity.

PROCEDURE

Programmatic goals shall be documented in the client's Individual Service Strategy. Goals must be specific and measurable in objective terms. The Incentive Program is contingent upon funding availability, if there are questions regarding funding availability, contact the BCWDB staff to discuss funding concerns. If it is jointly determined by the BCWDB and service provider that funding is not available, the BCWDB staff will send confirmation to WIOA Service Providers that the incentive program has been placed on hold until the beginning of the next program year.

Achievements eligible for an incentive award require documentation for the award. Award amounts include:

1. Attain high school diploma or GED, evidenced by copy of high school diploma or GED: \$100.00
2. Career pathway exploration activities or Leadership activities, evidenced by attendance sheets and documentation of the completion of (3) activities: \$20.00 for each set of activities completed not to exceed \$60.00 total.
3. Complete basic work readiness, or occupational skills attainment goals, evidenced by attendance sheets documenting completion of (3) Skills to Success activities: \$20.00 for each set of activities completed not to exceed \$60.00 total.
4. Complete TABE post-test demonstrating attainment educational functioning levels, evidenced by printed TABE results not to exceed \$50.00 total.
5. Attain a post-secondary credential (occupational certificate, diploma or degree), evidenced by copy of the credential: \$100.00

Youth incentive awards are limited to a lifetime amount not to exceed \$500.00 per eligible youth.

Exceptions may be granted by the BCWDB staff. Requests for a waiver must be submitted in writing and clearly state why an exception should be made for that particular client. Approved waivers must be in place prior to the exception activity.

Attainment of goals identified in the ISS also must be clearly documented in the client's file and in the Virginia Workforce Connection System. An Incentive Tracking Log must be maintained and list all incentives awarded to each youth; the log is provided by the BCWDB. Incentive awards shall be made in a uniform and consistent manner, as explained in this policy and procedure, that ensures all participants receive equal rewards for equal achievement.

DOCUMENTATION

Case managers must maintain an Incentive Tracking Log provided by BCWDB staff, listing all incentives awarded to each youth. Attainment of goals must be clearly documented in the client's file and in the Virginia Workforce Connection System. The client's receipt of checks, cash equivalents, or a material reward shall be acknowledged by them in the form of a signature documented on the Participant Receipt Form. The Incentive Tracking Log shall include, at a minimum, the client's name, VAWC State ID number, funding stream, specific goal accomplished that is being rewarded, and the amount and type of incentive. The Incentive Tracking Log shall be maintained in the client's folder, with a copy submitted for reimbursement. The Incentive Tracking Log shall be signed by the client receiving the incentive and by the case manager who delivered it to them.

Program operators must track the costs of incentives to the specific funding stream in which the client receiving the reward is participating and shall bill the BCWDB accordingly. Checks and other documentable means are the only allowable forms for an incentive payment and the WIOA Service Provider will follow financial policies in place for reimbursement from the BCWDB.

