

# Executive Committee Agenda

130 Kelly Square, Ste. 1, Lewisburg, PA 17837  
Friday, May 12, 2023 10:00 a.m.

Introduction & Call to Order

D. Zartman

Public Comment

Review & Approval of Meeting Minutes

D. Zartman

## Committee Updates & Action Items

- Youth Committee
  - Action Needed: Out-of-School Youth Paid Internship Revisions
- Audit/Finance Committee
  - Action Needed: Request for Funds to support The Link
- EARN Committee
- Governance Committee
- Personnel Committee
  - Action Needed: Organization Chart Revisions
  - Action Needed: Update the Salary Scale
  - Action Needed: Cost of Living Adjustment
  - Action Needed: Merit Pool Budget
- Policy & Performance Committee
  - Action Needed: OJT Policy Revisions
  - Action Needed: ITA Policy Revisions

Executive Director Updates

E. Mulberger

Open Discussion

D. Zartman

Upcoming Meeting Dates

D. Zartman

- Annual Meeting of the Members/LEO – June 21, 2023 @ 9:00 a.m.
- Joint WDB/LEO Meeting – June 21, 2023 @ 10:00 a.m.
- Executive Committee Meeting – August 11, 2023 @ 10:00 a.m.

# Executive Committee

## Meeting Notes January 13, 2023

The Executive Committee of Advance Central PA held a meeting via Zoom/teleconference on Friday, January 13, 2023.

### The following members attended via Zoom:

Jamie Aurand  
Jim Beamer  
Kenneth Chappell  
Dean Girton  
Ken Holdren  
Jim Stopper  
Suzanne White  
Dave Zartman

### The following members were excused:

Michele Foust

### The following staff attended:

Alexa Hann  
Korrie Lucas  
Erica Mulberger  
Patrick O'Connor  
Marca O'Hargan  
Gabi Randall  
Kelly Walter

### The following guests attended:

Annette Shtivelband, PhD  
Elanor Sidman

## Proceedings

The meeting was called to order at 10:01 a.m. by Dave Zartman, Executive Committee Chair.

## Public Comment

There were no public comments. The meeting was publicly advertised in the newspaper and on the Advance Central PA website in alignment with Sunshine Act requirements.

## Review & Approval of Meeting Minutes



Dean Girton made a motion to approve the November 10, 2022 Executive Committee meeting minutes. Susanne White seconded the motion. The motion was unanimously approved with no abstentions.

## Third Party Evaluation Presentation

Erica Mulberger, Advance Central PA Executive Director, introduced Dr. Annette Shtivelband, Research Evaluation Consulting (REC) Founder and Principal Consultant and Elanor Sidman, also with REC, to present findings and recommendations from their extensive evaluative study of Advance Central PA and the central PA CareerLink®. Annette provided a complete overview of the project which had four broad goals: examine the effectiveness of workforce development programs overseen by Advance Central PA, the PA CareerLink® network and subcontractors, establish a baseline and identify areas of improvement, make recommendations for continuous improvement, and provide evaluation tools and resources to support future evaluation efforts.

The study began in May 2022 and utilized a mixed-methods approach to understand and evaluate workforce development efforts. Annette reviewed the components of the evaluation which started with a thorough review of policies, procedures, outcome reports and data files. Interview and survey tools were developed, and data was then collected via interview of stakeholders, surveys of business partners, job seekers, and WIOA leadership as well as a secret shopper study. Strengths and areas for improvement were presented in regard to each of these study components.

Dave mentioned awareness in regard to many of the findings and expressed appreciation for the study in reinforcing the struggles with staff turnover and the concerns regarding unemployment compensation issues. Suzanne asked if there were any surprises in the findings. The need for communication with front line staff, not just supervisors, and expressed need for more education for the staff stood out to her. Erica shared her surprise regarding data that shows businesses are working with the PA CareerLink® though they're not receiving/hiring job

candidates as a result. Korrie Lucas, Advance Central PA Assistant Director, shared her surprise at seeing how competitive procurement can harm collaboration among partners who may have frontline staff that are not working together as well as they should be for customers. Elanor Sidman provided clarification regarding the findings noting staff feel the competition and it may impact their relationships with partner staff, but the study did not show adverse impact to job seekers; staff were found to be working together to make the experience smooth and streamline for the job seekers.

Annette provided a review of four evaluation questions key to understanding the study outcomes as follow.

1. What are the key strengths and areas of improvement for Advance Central PA and the PA CareerLink® network?

The study showed consensus regarding dedication to advance workforce development in Central PA including commitment to providing relevant and timely services. Many job seekers and business customers had positive interactions with Advance Central PA and PA CareerLink® partners. Areas for improvement include: communication and collaboration, staff capacity, availability of training such as in soft skills, and data collection.

2. What experiences do businesses and WIOA leaders have working with Advance Central PA?

There was overall high satisfaction with partnership with Advance Central PA, with 44% of businesses reporting having worked together for ten or more years, and describing the positive experience to their workforce as a result. Most utilized services from Advance Central PA are the occupational wage analysis and connections to partners. Most businesses surveyed had not hired any employees and suggestions were provided to better prepare job seekers for the hiring process and improve job seeker training.

3. What experiences do businesses and job seekers have working with the PA CareerLink® centers?

Most businesses have had high satisfaction communicating with staff and have used the job posting assistance as their top service from PA CareerLink®. Job seekers were also positive in their interaction with PA CareerLink®, noting that they would recommend them to others. Fifty-six percent (56%) of job seekers agreed they could not have gotten the job they wanted without the assistance received. Meanwhile, 69% of job seekers reported the PA CareerLink® helped them address barriers to employment, though businesses still observe that job seekers have barriers.

4. How satisfied are Advance Central PA's workforce development partners and how can they improve these partnerships?

Both stakeholders and leaders are pleased with Advance Central PA's commitment to workforce development. Many noted the positive team-oriented environment and instrumental partnership. Areas for improvement include PA CareerLink® staff challenges with capacity and heavy workloads. Varying experiences with Advance Central PA led to different opinions in regard to communication.

Annette welcomed discussion on the findings posing questions about member observations and ideas the results may have sparked. Suzanne commented that the communication issues are not unique to Advance Central PA, but a very intentional effort needs to be made to ensure supervisors share downline to staff. She would like to know more about why people are coming to the PA CareerLink® and what kinds of training is not provided that should be. The need for more soft-skills training including good work ethic and habits stood out to her as a reoccurring topic throughout the study results. Ken Chappell agreed with Suzanne's comments noting also the necessary component of staff helping to motivate participants and keep them on track with goals. Annette noted staff turnover and capacity may impact these important services.

After robust discussion, Annette referred to the deliverables she and her REC staff have provided including the full objective evaluation report and a recommendations report with 15 actionable recommendations to be implemented across a two-year timeline. Annette then provided specific details including actions to: improve collaboration, share successes, work with subcontractors to address internal concerns, streamline service delivery with a plan to segment job seekers based on need, strategically decide how data will be used, refine data processes, and continue to make evaluation a priority.

Annette closed by reminding the Committee members that this study was facilitated from a lens of continuous improvement; recommendations should not take away from strengths. The outline to implement recommendations may be changed as members determine what is most feasible to do first, etc.

Full reports will be provided to the Committee and Erica will coordinate a future meeting to dive in and plan.

Erica thanked Annette and Elanor for attending the meeting and for all of their efforts to collect meaningful data that will help Advance Central PA continuously improve the local workforce development system.

## Executive Committee Updates & Action Items

The Audit/Finance Committee is the only committee with a report due to the length of the presentation.

### Audit/Finance Committee

Jim Stopper, Finance Committee Chair, provided the update.

#### Financial Reports

Staff are working on the financial reports for quarter ending December 31<sup>st</sup>.

#### Renewal of Line of Credit with First National Bank

Jim explained the line of credit that was put in place in the event of a delay in receiving funds such as during a government shutdown or when there are delays in the federal or state budgets being passed. Advance Central PA does not pay any fees or interest unless the funds are accessed. The line of credit has to be renewed annually. To date the line of credit has not been used. The current rate is 3.924953%.



**Jim Stopper made a motion to renew Advance Central PA's \$1,000,000 line-of credit with First National Bank for the period January 8, 2023 through January 7, 2024. Dean Girton seconded the motion. The motion was unanimously approved with no abstentions.**

#### Audit

Three staff members from Young, Oakes, Brown, and Company were on-site at Advance Central PA on January 4<sup>th</sup> and 5<sup>th</sup> to conduct the FY22 single audit. An exit interview was held with staff; there are no findings or concerns. A meeting will be held with the Audit Finance Committee once the final report is complete.

The Audit/Finance Committee will meet as needed.

## Executive Director's Update

Erica Mulberger, Advance Central PA Executive Director, provided the update.

Erica thanked everyone for their input and initial reactions to the study results presented by REC. She noted some of the recommendations have already been implemented, i.e. allowing staff at the PA CareerLink® to work remotely once per week, and supporting subcontractor adjustments to pay scale where possible.

Erica shared news that Commissioner Michael Pipe is resigning to accept a position in Governor Shapiro's administration as Deputy Chief of Staff for Public Safety.

## Open Discussion

There was none.

## Date of Next Meeting

Executive Committee Meeting – February 10, 2023 at 10:00 a.m.

LEO Meeting – March 15, 2023 at 9:00 a.m.

Joint WDB/LEO Board – March 15, 2022 at 10:00 a.m.

## Adjournment

With no further business to discuss, Dave adjourned the meeting at 11:51 a.m.

Respectfully Submitted,



Kelly Walter, Office/Board Coordinator

# Executive Committee Updates and Actions to be Taken

May 12, 2023

1. Motion to approve the minutes from the January 13, 2023 Executive Committee meeting.

Motion:

Second:

## Audit/Finance Committee • Jim Stopper, Chair

- Action Needed: Request for Funds to support The Link

The Audit/Finance Committee will meet as needed.

## EARN Committee • Kenneth Chappell, Chair

The EARN committee will meet as needed.

## Governance Committee • Dean Girton, Chair

The Governance Committee will meet as needed.

## Personnel Committee • Jamie Aurand, Chair

- Action Needed: Organization Chart Revisions
- Action Needed: Update the Salary Scale
- Action Needed: Cost of Living Adjustment
- Action Needed: Merit Pool Budget

The Personnel Committee will meet as needed.

## Policy and Performance Committee • Jim Beamer, Chair

- Action Needed: OJT Policy Revisions
- Action Needed: ITA Policy Revisions

The Policy and Performance Committee will meet as needed.

## Youth Committee • Suzanne White, Chair

- Action Needed: Out-of-School Youth Paid Internship Revisions

The Youth Committee will meet as needed.

Advance Central PA  
 FY 23 Contract Expense and Obligation Report  
 From 7/1/2022 Through 3/31/23

Contract Period	Contract Title	Available Funds	Total Expended	Obligated Funds <sup>1</sup>	% of Total Oblig. and Exp	Unoblig. Amount
10/21 - 06/23	PY21 2nd Inc. WIOA Adult	915,351	877,916	0	95.91%	37,435
07/22 - 06/24	PY22 1st Inc. WIOA Adult	216,088	0	194,479	90.00%	21,609
10/22 - 06/24	PY22 2nd Inc. WIOA Adult	965,662	0	449,393	46.54%	516,269
10/22 - 06/25	PY22 DW Transfer to Adult	500,000	0	0	0.00%	500,000
	<b>Adult Programs</b>	<b>2,597,101</b>	<b>877,916</b>	<b>643,872</b>	<b>58.60%</b>	<b>1,075,313</b>
07/21 - 06/23	PY21 1st Inc. WIOA DW	104,616	104,616	0	100.00%	0
10/21 - 06/23	PY21 2nd Inc. WIOA DW	1,097,941	771,342	241,471	92.25%	85,128
07/22 - 06/24	PY22 1st Inc. WIOA DW	256,897	0	231,207	90.00%	25,690
10/22 - 06/24	PY22 2nd Inc. WIOA DW	520,598	0	26,429	5.08%	494,169
	<b>Dislocated Worker Programs</b>	<b>1,980,052</b>	<b>875,958</b>	<b>499,107</b>	<b>69.45%</b>	<b>604,987</b>
10/20 - 12/22	PY20 Rapid Response	42,391	42,391	0	100.00%	0
01/22 - 06/24	PY21 Rapid Response	100,000	14,561	40,966	55.53%	44,473
02/23 - 06/23	PY22 Rapid Response - Digital Intake	87,593	0	87,593	100.00%	0
	<b>Rapid Response Programs</b>	<b>142,391</b>	<b>56,952</b>	<b>40,966</b>	<b>68.77%</b>	<b>44,473</b>
04/21 - 06/23	PY21 WIOA Youth	841,960	580,835	159,199	87.89%	101,926
04/22 - 06/24	PY22 WIOA Youth	1,521,961	383,874	398,197	51.39%	739,890
07/21 - 06/22	PY21 TANF Youth	496,282	488,290	6,301	99.66%	1,691
07/22 - 06/23	PY22 TANF Youth	710,500	2,969	317,245	45.07%	390,286
02/22 - 12/23	PY21 Business & Education Partnership	140,713	18,988	76,947	68.18%	44,778
	<b>Youth Programs</b>	<b>3,711,416</b>	<b>1,474,956</b>	<b>957,889</b>	<b>65.55%</b>	<b>1,278,571</b>
07/22 - 06/23	EARN	2,720,009	1,225,715	820,860	75.24%	673,434
	<b>Welfare Programs</b>	<b>2,720,009</b>	<b>1,225,715</b>	<b>820,860</b>	<b>75.24%</b>	<b>673,434</b>
01/19 - 06/23	Next Gen 18 - Adv. Man.	66,311	250	0	0.38%	66,061
01/19 - 06/23	Next Gen 18 - Healthcare	65,291	250	0	0.38%	65,041
02/20 - 06/23	Next Gen 19 - Adv. Man.	232,132	1,739	0	0.75%	230,393
02/20 - 06/23	Next Gen 19 - Healthcare	238,606	1,975	0	0.83%	236,631
NA	IP Sustainability Fund	337,248	0	0	0.00%	337,248
	<b>Industry Partnerships</b>	<b>939,588</b>	<b>4,214</b>	<b>0</b>	<b>0.45%</b>	<b>935,374</b>
03/20 - 06/23	PASmart CNC Apprenticeship	29,967	22,614	6,927	98.58%	426
01/22 - 06/23	PASmart CPI Apprenticeship	649,223	80,898	531,204	94.28%	37,121
01/23 - 06/24	Apprenticeship Building America	183,333	302	45,641	25.06%	137,390
	<b>Reemployment Services</b>	<b>862,523</b>	<b>103,512</b>	<b>538,131</b>	<b>74.39%</b>	<b>220,880</b>
NA	Research Department	91,366	23,817	0	26.07%	67,549
NA	Gold Standard	62,406	863	945	2.90%	60,598
NA	Highmark Initiative	777	0	0	0.00%	777
NA	Engage	10,334	1,195	0	11.56%	9,139
05/22 - 06/22	FIT4Construction	171,990	7,245	156,859	95.41%	7,886
7/22 - 12/23	PREP PFEW	22,349	0	22,334	99.93%	15
08/22 - 06/24	DCED Videos	82,154	9,764	0	11.88%	72,390
10/20 - 09/23	ARC Reboot	725,735	131,440	585,993	98.86%	8,302
08/21 - 12/22	Statewide Funds	33,750	33,750	0	100.00%	0
07/20 - 06/23	Statewide Funds	9,326	0	9,326	100.00%	0
04/20 - 06/23	Statewide Funds	332,777	285,682	47,095	100.00%	0
07/22 - 06/23	Statewide Funds	28,000	26,600	0	95.00%	1,400
07/22 - 06/23	Statewide Funds	35,321	34,704	0	98.25%	617
07/22 - 06/23	Statewide Funds	21,314	924	20,390	100.00%	0
07/22 - 06/23	Statewide Funds	13,625	5,758	7,867	100.00%	0
07/22 - 06/23	Statewide Funds	6,600	0	6,600	100.00%	0
	<b>Other Programs</b>	<b>1,647,824</b>	<b>561,742</b>	<b>857,409</b>	<b>86.12%</b>	<b>228,673</b>
	<b>Grand Total</b>	<b>14,600,904</b>	<b>5,180,965</b>	<b>4,358,234</b>	<b>65.33%</b>	<b>5,061,705</b>

**Notes:**

1 Obligated funds include the funds unexpended but obligated for the FY 23 subcontractor, training, and Resource Sharing Agreement budgets.

Advance Central PA  
Operating Budget to Actual Comparison  
From 7/1/2022 Through 3/31/23

	Total Budget - Original	YTD Actual Expense	Total Budget Variance - Original	Percent Total Budget Expended *
Operational Expenses				
Salaries And Benefits	1,010,385	637,292	373,092.79	63.07%
Staff Travel & Development	30,034	9,834	20,199.89	32.74%
Board Expenses	8,903	4,001	4,901.79	44.94%
General Office Supplies	5,116	3,077	2,038.97	60.15%
Leases - Copiers/Equipment	2,500	1,385	1,115.50	55.38%
Outreach	2,050	431	1,619.14	21.02%
Subscriptions	23,237	15,730	7,507.29	67.69%
Memberships	10,510	9,129	1,380.51	86.86%
Vehicles	6,350	3,033	3,316.94	47.76%
Equipment And Furnishings	8,760	2,812	5,947.88	32.10%
Professional Fees	15,825	12,172	3,652.98	76.92%
Business Services	14,760	80	14,679.95	0.54%
Computer Services	35,164	15,646	19,517.89	44.49%
Facility Costs	<u>76,565</u>	<u>57,035</u>	<u>19,529.78</u>	<u>74.49%</u>
Total Operational Expenses	1,250,159.00	771,657.70	478,501.30	<u>61.72%</u>
Total Expenditures	1,250,159.00	771,657.70	478,501.30	<u>61.72%</u>

Notes:

\* Anticipated expenditure rate of 75%.

Advance Central PA  
 FY23 Consolidated RSAB Budget to Actual Comparison  
 From 7/1/2022 Through 3/31/23

	<b>Total Budget - Original</b>	<b>Current Year Actual</b>	<b>Variance - Original</b>	<b>Budget Expended *</b>	<b>Budget Remaining</b>
<b>REVENUE:</b>					
WIOA Adult	205,171	127,288	77,883	62.04%	37.96%
WIOA Dislocated	205,171	127,287.80	77,883	62.04%	37.96%
WIOA Out of School	117,983	72,233	45,750	61.22%	38.78%
EARN	200,524	128,636	71,888	64.15%	35.85%
Advance Central PA Total: <sup>1</sup>	728,849	455,445	273,404	62.49%	37.51%
WAGNER PEYSER	396,357	232,078	164,279	58.55%	41.45%
WP REGIONAL	14,495	8,734	5,761	60.26%	39.74%
VETS	98,186	57,918	40,268	58.99%	41.01%
RAPID RESPONSE	4,509	3,585	924	79.51%	20.49%
OVR	92,030	53,831	38,199	58.49%	41.51%
STAFF	14,495	8,734	5,761	60.26%	39.74%
DEVELOPMENT					
OVERSIGHT	14,495	8,734	5,761	60.26%	39.74%
TRADE	36,542	21,460	15,082	58.73%	41.27%
State Partner Total:	671,107	395,074	276,033	58.87%	41.13%
Total REVENUE	1,399,956	850,519	549,438	60.75%	39.25%
<b>EXPENSES:</b>					
<b>PERSONNEL</b>					
Total PERSONNEL	681,632	447,417	234,214.83	65.64%	34.36%
<b>FACILITY</b>					
Total FACILITY	635,357	455,593	179,763.58	71.71%	28.29%
<b>OPERATIONAL</b>					
Total OPERATIONAL	318,693	143,844	174,849	45.14%	54.86%
<b>USAGE FEE (Non-Partner Renters)</b>					
Total USAGE FEE	270,542	196,336	74,206	72.57%	27.43%
TOTAL EXPENDITURES	1,365,140	850,519	514,621	62.30%	37.70%

NOTE: Revenue amounts show details by RSAB partner. The expenses are listed by category. Monthly, the expenses are allocated to all partners and then the revenues are collected. Therefore revenues and expenditures should be equal.

\* Anticipated expenditure rate of 75%.

1 Advance Central PA is responsible for approximately 54% of the total shared PA CareerLink<sup>®</sup> operating costs compared to 46% paid by other required PA CareerLink<sup>®</sup> partners.



Advance Central PA  
 Subcontractor Budget and Actual Comparison  
 From 7/1/2022 Through 3/31/23

**Tuscarora Intermediate Unit 11(TIU)**

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended <sup>1</sup>	Percent Total Budget Remaining
OPERATIONAL EXPENSES <sup>2</sup>					
Adult Pool	513,628	333,518	180,110	64.93%	35.07%
Dislocated Worker Pool	488,359	343,159	145,200	70.27%	29.73%
OS Youth Pool <sup>3</sup>	100,000	59,419	40,581	59.42%	40.58%
TANF	30,000	17,773	12,227	59.24%	40.76%
Engage	14,600	-	14,600	0.00%	100.00%
Statewide Training	2,800	2,800	-	100.00%	0.00%
ARC Reboot	79,952	22,493	57,459	28.13%	71.87%
EARN Pool <sup>3</sup>	100,000	59,418	40,582	59.42%	40.58%
Total OPERATIONAL EXPENSES	1,329,338	838,580	490,758	63.08%	36.92%
DIRECT CUSTOMER SERVICES <sup>4</sup>					
Adult Pool	2,500	-	2,500	0.00%	100.00%
Dislocated Worker Pool	3,500	-	3,500	0.00%	100.00%
Total DIRECT CUSTOMER SERVICES	6,000	-	6,000	0.00%	100.00%
TOTAL EXPENDITURES	1,335,338	838,580	496,758	62.80%	37.20%

**Central Susquehanna Opportunities, Inc. (CSO)**

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended <sup>1</sup>	Percent Total Budget Remaining
OPERATIONAL EXPENSES <sup>2</sup>					
Adult Pool	405,982	111,875	294,107	27.56%	72.44%
Statewide Training	18,200	18,200	-	100.00%	0.00%
IS Youth Pool	176,226	94,078	82,148	53.38%	46.62%
TANF Youth	313,256	179,544	133,712	57.32%	42.68%
Dislocated Worker Pool	496,352	276,538	219,814	55.71%	44.29%
Business Edu. Partnership	80,000	10,571	69,429	13.21%	86.79%
Rapid Response <sup>5</sup>	95,866	55,413	40,453	57.80%	42.20%
Statewide Adult	192,852	154,508	38,344	80.12%	19.88%
Statewide Dislocated Worker	83,195	83,195	-	100.00%	0.00%
Building Green Futures	119,223	617	118,606	0.52%	99.48%
ARC Reboot	111,558	55,868	55,690	50.08%	49.92%
EARN Pool	1,287,401	680,415	606,986	52.85%	47.15%
EARN SNAP	45,081	29,309	15,772	65.01%	34.99%
Total OPERATIONAL EXPENSES	3,425,192	1,750,131	1,675,061	51.10%	48.90%



DIRECT CUSTOMER SERVICES <sup>4</sup>					
Adult Pool	10,000	9,359	641	93.59%	6.41%
IS Youth Pool	21,200	19,613	1,587	92.51%	7.49%
TANF Youth	155,625	19,285	136,340	12.39%	87.61%
Dislocated Worker Pool	10,000	1,112	8,888	11.12%	88.88%
ARC Reboot	2,000	251	1,749	12.55%	87.45%
EARN Pool	77,036	10,209	66,827	13.25%	86.75%
Total DIRECT CUSTOMER SERVICES	275,861	59,829	216,032	21.69%	78.31%
TOTAL EXPENDITURES	3,701,053	1,809,960	1,891,093	48.90%	51.10%

#### Central Susquehanna Intermediate Unit

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended	Percent Total Budget Remaining
OPERATIONAL EXPENSES <sup>2</sup>					
TANF Youth	109,237	82,270	26,967	75.31%	24.69%
Statewide Training	4,200	4,200	-	100.00%	0.00%
OS Youth Pool	735,565	463,777	271,788	63.05%	36.95%
Total OPERATIONAL EXPENSES	849,002	550,247	298,755	64.81%	35.19%
DIRECT CUSTOMER SERVICES <sup>4</sup>					
TANF Youth	58,319	47,641	10,678	81.69%	18.31%
OS Youth Pool	175,678	64,205	111,473	36.55%	63.45%
Total DIRECT CUSTOMER SERVICES	233,997	111,846	122,151	47.80%	52.20%
TOTAL EXPENDITURES	1,082,999	662,093	420,906	61.14%	38.86%

#### NOTES:

1 Anticipated expenditure rate of 75% for operating expenses.

2 Operational expenses include personnel, facilities, and operating expenses for the subcontractors.

3 These budgets are for TIU's Business Services contract in which TIU assists with placements of program participants and helps employers find talent from all PA CareerLink<sup>®</sup> programs.

4 Direct customer services include wages and benefits for participants in paid work experience and support services like transportation, clothing, and clearances.

5 CSO Rapid Response budget includes The Link.



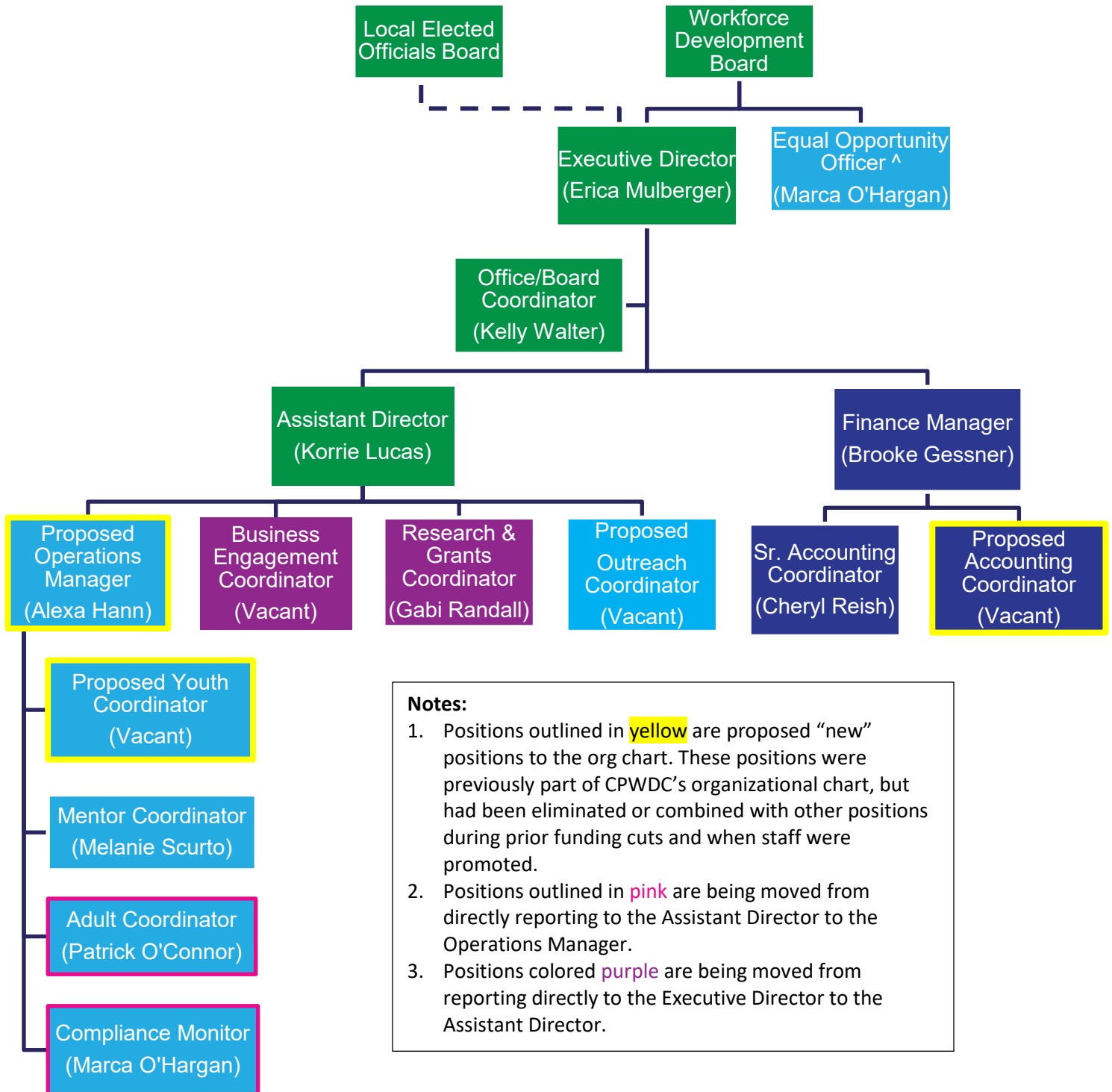
FY23 CONSOLIDATED TRAINING CONTRACT OBLIGATIONS  
As of 4/21/2023

Fund Source		Budget	Encumbrance	Actual	Total Obligation	Budget Available for Encumbrance		Number of Participants	Percentage of Total Budget Obligated
INDIVIDUAL TRAINING ACCOUNTS (ITAs)								FY23 ITA	
Adult		\$2,566	\$287	\$1,482	\$1,769	\$797		1	68.94%
Adult POS		\$196,786	\$32,924	\$146,745	\$179,669	\$17,117		60	91.30%
Dislocated Worker		\$93,758	\$20,822	\$20,774	\$41,595	\$52,162		12	44.36%
TOTAL ITA		\$293,110	\$54,033	\$169,000	\$223,033	\$70,077		73	76.09%

ON THE JOB TRAININGS (OJTs)						FY23 OJT	
Adult	\$39,084	\$9,761	\$28,217	\$37,978	\$1,106	5	97.17%
Adult POS	\$61,984	\$12,918	\$25,588	\$38,505	\$23,479	8	62.12%
Dislocated Worker	\$62,505	\$0	\$0	\$0	\$62,505	0	0.00%
Out of School Youth	\$76,098	\$2,608	\$10,531	\$13,139	\$62,960	3	17.27%
TOTAL OJT	\$239,671	\$25,286	\$64,335	\$89,622	\$150,050	16	37.39%
TOTAL ITA/OJT	\$532,781	\$79,319	\$233,335	\$312,655	\$220,126	89	58.68%

INCUMBENT WORKER TRAINING							Number of Participants	Percentage of Total Budget Obligated
Fund Source		Budget	Encumbrance	Actual	Total Obligation	Budget Available for Encumbrance		
Next Gen Adv. Manuf. 2019	2021	\$68,000	\$0	\$27,900	\$27,900	\$40,100	20	41%
	2023			\$0				
Next Gen Healthcare 2019		\$65,751	\$0	\$250	\$250	\$65,501	0	0%
Next Gen Adv. Manuf. 2020		\$210,000	\$0	\$0	\$0	\$210,000	0	0%
Next Gen. Healthcare 2020		\$193,800	\$0	\$0	\$0	\$193,800	0	0%
Total		\$537,551	\$0	\$28,150	\$28,150	\$509,401	20	5%

## Draft- Organizational and Responsibility Chart



^ Advance Central PA may designate a staff member as the Equal Opportunity Officer (EOO) who has the capacity and ability to take on the role of EOO in addition to their other responsibilities. The EOO will report directly to Advance Central PA’s Workforce Development Board chairperson for all equal opportunity related activities. The individual will report to their supervisor as indicated on the organization chart in regard to all other job functions.

## Strategy, Policy, & Oversight

### Primary Support to:

1. Workforce Development Board
2. Local Elected Officials Board
3. Board Committees

### Responsibilities Include:

- All activity related to support Boards
- Coordination of strategic activity
- Policy development and support
- Public relations and Outreach
- Regional, Statewide, and National Partnerships
- Legal, Personnel, and Oversight of all activity in the workforce area



## Responsibility Chart Updated April 19, 2023

## Workforce Research/Development

### Primary Support to:

1. Employer Services Committee
2. Research Consortium Members from other WDBs

### Responsibilities Include:

- Research and Labor Market Data Analysis
- Business Services
- Industry Partnerships
- Incumbent Worker Training
- Apprenticeship Programs
- Special Projects and Grants

## Operations

### Primary Support to:

1. PA CareerLink® System
2. Youth Committee
3. EARN Committee
4. Policy & Performance Committee

### Responsibilities Include:

- All activity related to support Boards
- Operational and Compliance oversight of PA CareerLink® Programs
- Performance and Outcomes
- Program Policy and Procedure development
- Job Seeker and Business Services
- K-12 Engagement

## Finance

### Primary Support to:

1. Workforce Development Board
2. Local Elected Officials Board
3. Audit/Finance Committee

### Responsibilities Include:

- All activity related to Fiscal Agent responsibilities
- Procurement and Contracting
- Management of IT and inventory
- Support and information to other departments
- Budget preparation and reporting

## OJT Policy – Revisions as Approved by the Policy & Performance Committee

### Employer Eligibility

- Page 4, #1: Revise the last sentence to allow the Executive Director to apply permanent disqualification from the OJT program for egregious issues.
- Page 5, #14: Remove the requirement for Executive Director approval when a single employer wants to enter into more than one simultaneous OJT contract. Instead allow multiple OJT contracts for a single employer, to promote meaningful financial savings while also making sure funding is available across industries and employers. Define a cap per employer as follows: 25% of the employer's workforce or 25 OJT contracts, whichever is lower with additional OJT contracts not to exceed 25% of the workforce on an exception basis at the discretion of the Executive Director.

### Participant Eligibility

- Page 6, #2: Add a sentence to clarify that Dislocated Workers, Out-of-School Youth, and EARN participants (funded by EARN) are eligible for OJT without regard to income. Title I Adult eligibility should continue to be based on family or individual income below the self-sufficiency standard. An EARN participant co-enrolled as Adult to access Adult training funds will require the income review.
- Page 7, #3 under the asterisk: Add a sentence to clarify that program staff such as OSY staff and EARN staff will complete the assessments for their respective participants (no change).
- Page 8, #3, WorkKeys®: Collapse the WorkKeys® Foundational Skills Assessments section into the first bullet with clear language to allow assessments best for the individual, such as TORQ, Title II facilitated assessments, and WorkKeys®.
- Page 8, #6: Update the last sentence to include language that an individual cannot receive funding for ITA and OJT simultaneously.

### Job Matching

- Page 9: Add language describing expectations for Job Seeker Services staff to proactively and readily share that participants have everything in place for OJT eligibility at the time of the Match Meeting.

## **New Section with Clarifications Regarding Registered Apprenticeship**

- Add a new section on Registered Apprenticeship (RA) clearly stating that a RA can receive OJT funding and that all other policy considerations apply. This includes that the Apprentice cannot be employed by the business prior to starting in the Apprenticeship. Define successful completion of a RA OJT as an Apprentice who continues in the RA after the OJT training offset ends.

## **Other**

- **Master Contract**  
Allow staff to consider implementation of a master contract for employers replacing the need for a new signed contract each time there is an OJT written. The signed master contract would be emailed to the OJT employer for review each time there is a new OJT in process so that they can confirm the signatory is still accurate. Allow staff to further research whether the signature should/can be adjusted so that the contract is agreed to by the person on behalf of the employer and therefore still stand even with a staffing change. In a circumstance such as acquisition or other major change, a new contract would need obtained.
- **Contract Package Formatting**  
Staff review of the entire contract package to make formatting and non-substantive edits that will increase ease of use and understanding.

### **Participant Eligibility**

- Pages 3-4, #2: Update the self-sufficiency standard information to be more general rather than citing the most current year available so it doesn't need to be updated within the policy as new data is available.
- Page 4, #4, the first bullet under the asterisk: Clarify that SOC codes can change therefore the subcontractor should seek guidance from Advance Central PA if they believe an occupation is included on the HPO list but with a different SOC code than found on O\*Net.
- Pages 4-5, #4, the second bullet under the asterisk: Collapse the WorkKeys® Foundational Skills Assessments section into the first bullet with clear language to allow assessments best for the individual, such as TORQ, Title II facilitated assessments, and WorkKeys®.

### **Clearances and Background Checks**

- Pages 5-6: Add a section at the end of Clearances and Background Checks to acknowledge that clearances sometimes take more time to receive than expected. In such a case, the subcontractor is advised to submit the ITA contract with a clear CWDS case note and note on the ITA form that clearances are pending. This will allow Advance Central PA staff time to review everything else and approve contingent on clearances. Also add a requirement that subcontractor staff clearly document the guidance and timelines given to participants as evidence that processes were started in a timely manner.
- Pages 5-6: Add the links for the websites used to perform clearance and background checks.

### **Training Provider Eligibility**

- Page 7: Add clarification within the Training Provider Eligibility section explaining that a training program may be on the ETPL as part of a Registered Apprenticeship Program approved by the Apprenticeship and Training Office.



## Funding Parameters

- Page 9, Funding Limits: Define the Program Types in weeks in alignment with the ETPL as shown below. Also, clarify that the ITA does not need to occur in the last 2 years of a long-term training if it is a Registered Apprenticeship program.

Program Length	Definition	Maximum Funding
Short Term	0 - 26 Weeks	\$3,500
1 Year	27- 78 Weeks	\$4,500
2 Year	79-130 Weeks	\$7,000
3 or 4 Year (only the last 2 years are eligible unless the ITA is for RA RTI)	131 Weeks or More	\$7,000

## Support Services

- Page 12: Include books that are not otherwise included with the tuition as an available Support Service. Allow books to be purchased in hard copy or digital form and allow book rental as well as purchase. (Also apply edits to Attachment A which is a Support Services form.)

## New Section with Clarifications Regarding Registered Apprenticeship

- Add clarification that an Apprentice who is an incumbent worker, and therefore not eligible for OJT funds, may be eligible for an ITA at the start of the RA, even if the RA is considered long-term in length.
- Add clarification that an Apprentice who is a new employee and is eligible for OJT funds, may be eligible for an ITA once the OJT is complete, even if the RA is considered long-term in length.

## New Section Outlining Tuition Refund Protocol

- Clearly define the process for tuition refunds within the policy. If there is a refund for tuition paid, including for a circumstance where someone withdrew/did not complete, Advance Central PA shall receive the training provider's refund first. Then if the refund amount is greater than the amount of the ITA, the participant shall receive the remainder.

## New Section with Expectations for ITA Tracking Sheet Usage

- Add a section describing the procedure for the ITA Tracking Sheet including a requirement it is accurately updated within 7 days of a change.

## **New Section Solidifying Information on Funding a Repeat Course**

- Solidify within the policy a Committee decision made in May 2017 allowing staff review of requests for funding to repeat a failed course with language as follows: "If a participant requests ITA funding to repeat a failed course and is in overall good standing otherwise with their training, the request will be submitted to Advance Central PA staff for review."

## **Other**

- **Contract Package Formatting**  
Staff review of the entire contract package and forms to make formatting and non-substantive edits that will increase ease of use and understanding.



# SENATE MAJORITY POLICY COMMITTEE

## SENATOR DAN LAUGHLIN CHAIR

ROOM 351 • CAPITOL BUILDING • HARRISBURG, PA 17120-3030 • 717-787-8927

# Public Hearing

## Addressing the Rural Workforce Challenges – Population Decline, Labor and Housing Shortage

Wednesday, May 17, 2023

PA College of Technology

Professional Development Center, 1 College Avenue

Williamsport, PA 17701

1:00 pm

**Topic:** Highlight the present-day workforce challenges in rural PA. Focus on economic impact on communities and businesses resulting from a population decline, labor and housing shortage.

### AGENDA

- |             |  |
|-------------|--|
| <b>1:00</b> | <b>Opening Remarks</b><br>Senator Dan Laughlin, Majority Policy Chair<br>Senator Gene Yaw, Lycoming County   |
| <b>1:10</b> | <b>Vitality of Pennsylvania's Rural Communities</b><br>Nancy Walker, Acting Secretary Pennsylvania Department of Labor & Industry<br>Kyle Kopko, Executive Director, Center for Rural Pennsylvania                           |
| <b>1:45</b> | <b>Workforce Demands and Opportunities</b><br>Dr. Michael Reed, President, Pennsylvania College of Technology<br>Shannon Munro, VP for Workforce Development, PCT<br>Erica Mulberger, Executive Director, Advance Central PA |
| <b>2:10</b> | <b>Rural Community Development</b><br>Jason Fink, Pres & CEO, Williamsport/Lycoming Chamber of Commerce<br>Kristin Hamilton, Executive Director, Develop Tioga   |
| <b>2:40</b> | <b>Housing Trends in Rural PA</b><br>Herman Logue, Business Development, Glenn O Hawbaker, Inc.<br>Nathan Yoder, Executive Vice President, Yoder Builders Inc.   |
| <b>3:20</b> | <b>Closing Remarks</b><br>Senator Laughlin<br>Committee Members  |
| <b>3:30</b> | <b>College Tour</b>  |