

Executive Committee Agenda

130 Kelly Sq. Ste.1, Lewisburg, PA
Friday, May 10, 2024
10:00 a.m.

Introduction & Call to Order

M. Foust

Public Comment

Review & Approval of Meeting Minutes

M. Foust

Committee Updates & Action Items

- Audit/Finance Committee
 - Action Needed: PA CareerLink® Northumberland/Snyder/Union Counties lease renewal
 - Action Needed: Request for Rapid Response funding to support The Link
- EARN Committee
- Governance Committee
- Personnel Committee
- Policy & Performance Committee
 - Action Needed: PA CareerLink® Operator Policy approval
 - Action Needed: PA CareerLink® Operator contract extension
 - Action Needed: The Link contract extension
 - Action Needed: Job Seeker Services contract extension
 - Action Needed: Business Solutions contract extension
- Youth Committee

Executive Director Updates

E. Mulberger

Open Discussion

M. Foust

Upcoming Meeting Dates

M. Foust

- Annual Meeting of the Members/LEO Meeting – June 19, 2024 @ 9:00 a.m.
- Joint WDB/LEO Meeting – June 19, 2024 @ 10:00 a.m.
- Executive Committee Meeting – August 9, 2024 @ 10:00 a.m.

Executive Committee

Meeting Notes February 9, 2024

The Executive Committee of Advance Central PA held a hybrid meeting on Friday, February 9, 2024, at the Advance Central PA office, 130 Kelly Square Suite 1, Lewisburg, PA.

The following members attended:

Jay Alexander
Jamie Aurand
Jim Beamer
Kenneth Chappell
Michele Foust
Dean Girton
Robert Postal
Suzanne White
Dave Zartman

The following members were excused:

Jim Stopper

The following staff attended:

Korrie Lucas
Erica Mulberger
Kelly Walter

Proceedings

The meeting was called to order at 10:05 a.m. by Michele Foust, Executive Committee Chair.

Public Comment

There were no public comments.

Review & Approval of Meeting Minutes



Dean Girton made a motion to approve the November 9, 2023 Executive Committee meeting minutes. Jim Beamer seconded the motion. The motion was unanimously approved with no abstentions.

Executive Committee Updates & Action Items

Audit/Finance Committee

Erica Mulberger, Executive Director, provided the update on behalf of Jim Stopper.

Financial Reports through December 31, 2023

Financial reports through the end of December were included in the packet and provided in advance of the meeting. Expected expenditure rates are 50%.

In reviewing the Contract Expense and Obligation Report, Erica reported an additional \$125,000 in Rapid Response funds is not yet shown as it was recently awarded to support The Link.

The Advance Central PA Operating Budget to Actual Report showed an expenditure rate of 44.95%. A few line items that show over budget are expenditures t paid at the beginning of the year such as memberships and insurances.

The Consolidated RSAB Expense Report showed total expenditures for the PA CareerLink® sites at 43.34%.

Subcontractor Budget to Actual Comparison shows the expenses for each of the Advance Central PA's service providers.

The Consolidated Training Contract Obligations from July 1, 2023, through January 31, 2024, show 60 participants were approved for Individual Training Accounts (ITA) and 22 participants were approved for On-the-Job Training Accounts (OJT). In comparison, last year at this time, there were 61 ITAs and 13 OJTs.

Theft/Fraud Payments

Erica updated the Committee about a staff member's email being hacked at the end of November. The hacker gained access and control over the staff's emails which resulted in the submittal of an Advance Central PA direct deposit change form which was processed internally. Several paychecks were sent to the hacker's bank account before the staff realized what happened. Staff reached out to both the bank and our insurance provider to try to recoup the funds, but it was not possible. The insurance company cited it as an act of fraud that was processed based on error.

Advance Central PA has since added additional internal control measures to ensure no one's bank account information can be updated without a second confirmation method outside of email; the process requires a voided check or deposit slip be included with a direct deposit change form.

The staff received pay using unrestricted Gold Standard funds since it would be unallowable to double charge federal and state grants even with the fraudulent payments.

Renewal of Line of Credit with First National Bank

Advance Central PA has a \$1 million line of credit in case there is a delay in receiving funds from the state or federal governments from events such as a government shutdown or delayed budget approval. Advance Central PA does not pay any fees or interest unless funds are drawn down. The current interest rate is 5% and funds have not been used to date. The line of credit must be renewed annually.

- ▲ **Dave Zartman made a motion to renew Advance Central PA's \$1,000,000 line-of credit with First National Bank through January 8, 2025. Jay Alexander seconded the motion. The motion was unanimously approved with no abstentions.**

Adult Training Funds

As shown on the Training Contract Obligation Report, Adult training funds for ITAs and OJTs are running low. Advance Central PA would like to increase Adult ITA and OJT training funds by \$50,000 to avoid a wait list situation.

- ▲ **Suzanne White made a motion to increase Adult ITA and OJT training funds by \$50,000. Dave Zartman seconded the motion. The motion was unanimously approved with no abstentions.**

Audit Update

Erica noted the third-party auditors were currently onsite reviewing documentation.

The Audit/Finance Committee will meet as needed.

EARN Committee

Ken Chappell, EARN Committee Chair, provided the update.

Program Update

Advance Central PA will be tracking onsite interactions for EARN participants and analyzing the data for trends and other insights into what areas and activities drive participants towards in-person engagement. This new process is part of a plan to improve performance measures that were below expectations for program year 2022-2023. A formal monitoring report from the PA Dept. of Human Services is forthcoming and will be shared with the EARN Committee.

Coaching Collaborative

Advance Central PA staff and EARN provider staff continue to participate in the "Coaching Collaborative" project with a technical assistance provider for the US Dept. of Health & Human Services Office of Family Assistance. Patrick O'Connor, Advance Central PA Adult Program Coordinator, continues to take the lead on this project. The project is in its final stage as EARN staff practice what they have learned by incorporating it into regular operations.

The next EARN Committee meeting is scheduled for February 20th.

Governance Committee

Dean Girtton, Governance Committee Chair, provided the update.

Membership

Workforce Development Board member Tracie Witter has changed positions within PPL and is recommending her replacement for appointment to the board. An application for approval consideration is expected prior to the March meeting.

Governance Documents

Labor & Industry's Bureau of Workforce Development Administration recently required submittal of the LEO Agreement and the LEO Board and CPWDC Partnership Agreement with signatures as part of a monitoring corrective action. These documents were submitted timely, however, both agreements are out of date in non-substantial ways. Staff will propose changes for the Governance Committee's review before bringing the proposed changes to the Local Elected Officials Board and Workforce Development Board to make the agreements current.

The Statement of Financial Interest Forms will be sent soon.

The Governance Committee will meet as needed.

Personnel Committee

Dave Zartman, Personnel Committee Chair, provided the update.

Staffing Updates

Advance Central PA welcomes Amy Keefer as the new Fiscal Coordinator. She comes with extensive experience in fiscal positions including, banking, accounts payable, payroll, and other accounting functions. Amy has been shadowing Brooke and is off to a strong start in her new role.

Allison Grose will start February 12th in the Youth Coordinator position. She has significant transferrable skills from working as a teacher in a local high school.

Staff are in the process of interviewing for the Business Engagement Coordinator position.

Commissioner Postal asked about the coverage plan in place after Alexa Hann's resignation from the Operations Manager position. Erica explained Alexa had only recently been promoted to that role and new hire Allison will fill the role Alexa had held for a number of years. In the meantime, current staff are covering the workload.

Erica shared that the Outreach Coordinator position has not yet been posted and is still under her evaluation.

The discussion turned to use of space and remote work. Staff highly value the ability to work from home and are successfully tackling the workload, carrying more than ever. New hires have noted they wouldn't have accepted employment offers if remote work wasn't an option; current staff have voiced it's important to their retention as well. Staff are in the office any time needed and choose to be in the office when in-person collaboration is best. With full staff, offices will be shared. Committee members expressed that staff should seek opportunities for smaller office space in the future, weighing that against moving costs, etc.

Performance Reviews

One on one meetings are well underway to review 2023 performance. Those are going well and opening meaningful dialogue.

The Personnel Committee will meet as needed.

Policy and Performance Committee

Jim Beamer, Policy and Performance Committee Chair, provided the update.

Advance Central PA Monitoring Highlights

Jim reviewed program monitoring underway for Title I, EARN, and PA CareerLink® operations.

PA Department of Labor & Industry Bureau of Workforce Development Administration (BWDA) Monitoring

On January 6, staff submitted a response to BWDA's PY2022 monitoring report addressing six findings. These findings were important administratively. For example, the Sunshine Act requires that notes for a hybrid meeting

include the physical location of the meeting as well as the virtual option which is something we were not compliant with. A response to the corrective actions submitted by staff has not yet been received.

BWDA is currently conducting a Local Workforce Development Board Membership Review and PY2023 Sunshine Act Monitoring.

PY2023 Q1 WIOA Common Measures Performance Reports

Staff continue to analyze the PY2023 Q1 reports to identify factors contributing to lower than expected performance. There is a mix of findings ranging from provider staff data entry errors to technical issues inherent to how Common Measures are calculated.

The Policy and Performance Committee will meet as needed.

Youth Committee

Dinner & Dessert Events

Student and industry networking Dinner & Dessert events continue with funding from the Business Education Partnership (BEP) grant. These events provide an opportunity for a small group of high school students and their guardian to connect with local professionals to hear their inspiring career success stories, understand existing talent needs, and learn about the possible career pathways in the respective field. Several events have been completed with others in planning stages.

Succession Planning

Suzanne shared she plans to retire from Kish Bank this spring. This will result in a vacancy for a private sector member of the WDB and a vacancy for Youth Committee Chair.

Suzanne will chair the next Youth Committee meeting scheduled for March 6th.

Executive Director Update

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

LMI Reports

Gabi Randall, Advance Central PA Research and Grants Coordinator has been working on refreshed LMI reports. Erica gave an in-depth overview and comparison of the current reports and the proposed reports. The Committee agreed with the newly proposed format and weighed in requesting minor adjustments before finalizing. Gabi will apply the changes to the LMI reports sent to the other WDB's who are members of the Research Consortium if they too agree with the updates.

State Budget Address

Erica reported on Governor Shapiro's Budget Address where increased funding requests for workforce development and education were highlights. Some changes have been proposed to introduce a new higher education model by combining Pennsylvania State System of Higher Education (PASSHE) and community colleges. Other education proposals focused on financial aid.

Grant Update

Erica reported Advance Central PA's application to the Recompete Grant from PA Department of Community & Economic Development (DCED) was not awarded, however, Senator Casey asked Erica for information. Erica will share plans proposed in the grant so that Senator Casey's office can review and determine whether there are initiatives they are interested in supporting. For example, Erica explained Rabbit Transit, a system offering low-cost transportation to individuals, needs local match funding to be eligible for a significant amount of funding from another source. She is sharing this information with Senator Casey's office.

EARN Incentive Services

Erica presented a request from the EARN provider for an exception to the EARN Incentive Services Policy for advice from the Committee. After a robust discussion, members decided that if the request aligns with the purpose of programming, and there is reasonable rationalization for the incentive, the staff should consider them on a case-by-case basis.

Open Discussion

Commission Postal inquired as to how Advance Central PA uses LMI. Erica discussed that it is used heavily in strategic planning, in conversation with elected officials such as in relation to population, to provide businesses with wage and other information so they can be competitive, and in developing policy. Further, the provider staff in the PA CareerLink® use LMI to help job seekers plan for their future careers.

Date of Next Meeting

LEO Meeting – March 20, 2024 at 9:00 a.m.

Joint WDB/LEO Board Meeting – March 20, 2024 at 10:00 a.m.

Executive Committee Meeting – April 12, 2024 at 10:00 a.m.

Adjournment

With no further business to discuss, Shelly adjourned the meeting at 11:43 a.m.

Respectfully Submitted,



Kelly Walter, Office/Board Coordinator

Executive Committee Updates and Actions to be Taken

May 10, 2024

1. Motion to approve the minutes from the February 9, 2024 Executive Committee meeting.

Audit/Finance Committee • Jim Stopper, Chair

- Action Needed: PA CareerLink® Northumberland/Snyder/Union Counties lease renewal
- Action Needed: Request for Rapid Response funding 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 Girtton, Chair

The Governance Committee will meet as needed.

Personnel Committee • Jamie Aurand, Chair

The Personnel Committee will meet as needed.

Policy and Performance Committee • Jim Beamer, Chair

- Action Needed: PA CareerLink® Operator Policy approval
- Action Needed: PA CareerLink® Operator contract extension
- Action Needed: The Link contract extension
- Action Needed: Job Seeker Services contract extension
- Action Needed: Business Solutions contract extension

The Policy and Performance Committee will meet as needed.

Youth Committee • Jon Ritter, Chair

The Youth Committee will meet as needed.

Advance Central PA
 FY 24 Contract Expense and Obligation Report
 From 7/1/2023 Through 3/31/24

Contract Period	Contract Title	Available Funds	Total Expended	% Expended	Amount Remaining	Obligated Funds ¹	% of Total Oblig. and Exp.	Unoblig. Amount
10/22 - 06/24	PY22 2nd Inc. WIOA Adult	837,346	837,346	100.00%	-	0	100.00%	0
10/22 - 06/24	PY22 DW Transfer to Adult	500,000	316,131	63.23%	183,869	135,945	90.42%	47,924
07/23 - 06/25	PY23 1st Inc. WIOA Adult	268,711	0	0.00%	268,711	241,840	90.00%	26,871
10/23 - 06/25	PY23 2nd Inc. WIOA Adult	1,105,194	0	0.00%	1,105,194	203,653	18.43%	901,541
	Adult Programs	2,711,251	1,153,477	42.54%	1,557,774	581,438	63.99%	976,336
07/22 - 06/24	PY22 1st Inc. WIOA DW	149,381	149,381	100.00%	-	0	100.00%	0
10/22 - 06/24	PY22 2nd Inc. WIOA DW	527,869	527,869	100.00%	-	0	100.00%	0
07/23 - 06/25	PY23 1st Inc. WIOA DW	315,767	315,767	100.00%	-	0	100.00%	0
10/23 - 06/25	PY23 2nd Inc. WIOA DW	1,148,449	156,577	13.63%	991,872	370,448	45.89%	621,424
	Dislocated Worker Programs	2,141,466	1,149,594	53.68%	991,872	370,448	70.98%	621,424
01/22 - 06/24	PY21 Rapid Response	53,848	53,848	100.00%	-	0	100.00%	0
02/23 - 10/23	PY22 Rapid Response - Digital Intake	77,295	77,295	100.00%	-	0	100.00%	0
10/23 - 12/24	PY23 Rapid Response	125,000	25,496	20.40%	99,504	53,626	63.30%	45,878
	Rapid Response Programs	256,143	156,639	61.15%	0	53,626	82.09%	45,878
04/22 - 06/24	PY22 WIOA Youth	893,597	869,289	97.28%	24,308	0	97.28%	24,308
04/23 - 06/25	PY23 WIOA Youth	1,841,332	322,096	17.49%	1,519,236	476,789	43.39%	1,042,447
07/22 - 06/23	PY22 TANF Youth	533,729	533,729	100.00%	-	0		0
07/23 - 06/25	PY23 TANF Youth	712,013	42,376	5.95%	669,637	345,792	54.52%	323,845
02/22 - 06/24	PY21 Business & Education Partnership	100,859	60,323	59.81%	40,536	11,925	71.63%	28,611
06/23 - 08/24	PY22 Business & Education Partnership	146,838	78,220	53.27%	68,618	59,733	93.95%	8,885
	Youth Programs	4,228,368	1,906,033	45.08%	2,322,335	894,239	66.23%	1,428,096
07/22 - 06/24	EARN	2,709,971	1,408,231	51.96%	1,301,740	669,178	76.66%	632,562
	Welfare Programs	2,709,971	1,408,231	51.96%	1,301,740	669,178	76.66%	632,562
01/19 - 06/24	Next Gen 18 - Adv. Man.	47,122	250	0.53%	46,872	0	0.53%	46,872
01/19 - 06/24	Next Gen 18 - Healthcare	65,042	250	0.38%	64,792	0	0.38%	64,792
02/20 - 06/25	Next Gen 19 - Adv. Man.	229,562	930	0.41%	228,632	0	0.41%	228,632
02/20 - 06/25	Next Gen 19 - Healthcare	235,332	412	0.18%	234,920	0	0.18%	234,920
01/24 - 06/25	Building & Construction	175,000	0	0.00%	175,000	0	0.00%	175,000
01/24 - 06/25	Agriculture	150,000	0	0.00%	150,000	0	0.00%	150,000
NA	IP Sustainability Fund	346,718	0	0.00%	346,718	0	0.00%	346,718
	Industry Partnerships	1,248,776	1,842	0.15%	1,246,934	0	0.15%	1,246,934
01/22 - 06/25	PASmart CPI Apprenticeship	273,379	35,794	13.09%	237,585	207,686	89.06%	29,899
01/23 - 06/26	Apprenticeship Building America	181,537	13,987	7.70%	167,550	8,975	12.65%	158,575
	Reemployment Services	454,916	49,781	10.94%	405,135	216,661	58.57%	188,474
7/22 - 12/23	PREP PFEW	20,755	20,755	100.00%	-	0	100.00%	0
08/22 - 06/24	DCED Videos	41,774	11,031	26.41%	30,743	12,050	55.25%	18,693
10/20 - 09/24	ARC Reboot	531,280	155,642	29.30%	375,638	369,988	98.94%	5,650
07/23 - 06/24	Statewide	50,750	17,783	35.04%	32,967	32,697	99.47%	270
07/23 - 06/24	Statewide	84,644	0	0.00%	84,644	0	0.00%	84,644
07/23 - 06/24	Statewide	210,763	82,439	39.11%	128,324	126,879	99.31%	1,445
07/23 - 06/24	Statewide	74,230	0	0.00%	74,230	0	0.00%	74,230
NA	Research Department	118,633	47,819	40.31%	70,814	0	40.31%	70,814
NA	Gold Standard	61,168	8,023	13.12%	53,145	941	14.65%	52,204
NA	Highmark Initiative	777	0	0.00%	777	0	0.00%	777
NA	Engage	20,591	423	2.05%	20,168	0	2.05%	20,168
NA	Fit4Construction	42,500	2,909	6.84%	39,591	0	6.84%	39,591
NA	ELIC	1,000	418	41.80%	582	0	41.80%	582
	Other Programs	1,258,865	347,242	27.58%	911,623	542,555	70.68%	369,068
	Grand Total	15,009,756	6,172,839	41.13%	8,836,917	3,328,145	63.30%	5,508,772

Notes:

1 Obligated funds include the funds unexpended but obligated for the FY 24 subcontractor, training, and Resource Sharing Agreement budgets.

Advance Central PA
Operating Budget to Actual Comparison
From 7/1/2023 Through 3/31/24

	Total Budget - Original	YTD Actual Expense	Total Budget Variance - Original	Percent Total Budget Expended *
Operational Expenses				
Salaries And Benefits	1,010,385	723,019	287,365.85	71.56%
Staff Travel & Development	30,034	10,784	19,249.62	35.91%
Board Expenses	8,903	5,297	3,606.09	59.50%
General Office Supplies	5,116	3,760	1,356.48	73.49%
Leases - Copiers/Equipment	2,500	1,134	1,365.67	45.37%
Outreach	2,050	2,217	(166.85)	108.14%
Subscriptions	23,237	15,645	7,592.25	67.33%
Memberships	10,510	10,859	(348.91)	103.32%
Vehicles	6,350	3,420	2,930.50	53.85%
Equipment And Furnishings	8,760	1,084	7,676.00	12.37%
Professional Fees	15,825	1,272	14,552.98	8.04%
Business Services	14,760	2,538	12,221.92	17.20%
Computer Services	35,164	20,603	14,561.15	58.59%
Facility Costs	<u>76,565</u>	<u>63,597</u>	<u>12,967.58</u>	<u>83.06%</u>
Total Operational Expenses	1,250,159.00	865,228.67	384,930.33	69.21%
Total Expenditures	<u>1,250,159.00</u>	<u>865,228.67</u>	<u>384,930.33</u>	<u>69.21%</u>

Notes:

* Anticipated expenditure rate of 75%.

Advance Central PA
FY24 Consolidated RSAB Budget to Actual Comparison
From 7/1/2023 Through 3/31/24

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended *	Percent Total Budget Remaining
REVENUE:					
WIOA Adult	229,344	138,809	90,535	60.52%	39.48%
WIOA Dislocated	229,344	138,809	90,535	60.52%	39.48%
WIOA Out of School	132,881	81,708	51,173	61.49%	38.51%
EARN	256,245	151,353	104,892	59.07%	40.93%
Advance Central PA Total: ¹	847,814	510,680	337,134	60.23%	39.77%
WAGNER PEYSER	433,835	272,143	161,692	62.73%	37.27%
WP REGIONAL	15,314	9,565	5,749	62.46%	37.54%
VETS	98,751	61,177	37,574	61.95%	38.05%
RAPID RESPONSE	10,056	6,373	3,683	63.37%	36.63%
OVR	111,923	68,729	43,194	61.41%	38.59%
OVERSIGHT	15,314	9,565	5,749	62.46%	37.54%
TRADE	15,314	8,069	7,245	52.69%	47.31%
State Partner Total:	700,508	435,621	264,887	62.19%	37.81%
Total REVENUE	1,548,322	946,301	602,021	61.12%	38.88%
EXPENSES:					
PERSONNEL					
Total PERSONNEL	775,201	522,520	252,681.54	67.40%	32.60%
FACILITY					
Total FACILITY	671,613	577,209	94,403.40	85.94%	14.06%
OPERATIONAL					
Total OPERATIONAL	292,906	143,670	149,236	49.05%	50.95%
USAGE FEE (Non-Partner Renters)					
Total USAGE FEE	245,591	195,230	50,361	79.49%	20.51%
TOTAL EXPENDITURES	1,494,129	1,048,169	445,960	70.15%	29.85%

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[®] operating costs compared to 46% paid by other required PA CareerLink[®] partners.

Advance Central PA
 Subcontractor Budget and Actual Comparison
 From 7/1/2023 Through 3/31/24

Tuscarora Intermediate Unit 11(TIU)

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended ¹	Percent Total Budget Remaining
OPERATIONAL EXPENSES ²					
Adult Pool	507,218	338,010	169,208	66.64%	33.36%
Dislocated Worker Pool	507,911	372,702	135,209	73.38%	26.62%
OS Youth Pool ³	100,000	64,682	35,318	64.68%	35.32%
Statewide CareerLink	45,166	45,166	-	100.00%	0.00%
Upgrades ⁷					
TANF	30,000	19,401	10,599	64.67%	35.33%
ARC Reboot ⁵	92,670	52,787	39,883	56.96%	43.04%
EARN Pool ³	100,000	64,684	35,316	64.68%	35.32%
Total OPERATIONAL EXPENSES	1,382,964	957,432	425,532	69.23%	30.77%
DIRECT CUSTOMER SERVICES ⁴					
ARC Reboot	3,659		3,659	0.00%	100.00%
Total DIRECT CUSTOMER SERVICES	3,659		3,659	0.00%	100.00%
TOTAL EXPENDITURES	1,386,623	957,432	429,191	69.05%	30.95%

Central Susquehanna Opportunities, Inc. (CSO)

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended ¹	Percent Total Budget Remaining
OPERATIONAL EXPENSES ²					
Adult Pool	573,171	334,909	238,262	58.43%	41.57%
IS Youth Pool	151,152	83,800	67,352	55.44%	44.56%
TANF Youth	334,615	231,535	103,080	69.19%	30.81%
Dislocated Worker Pool	578,171	445,522	132,649	77.06%	22.94%
Business Edu. Partnership 21	50,000	50,000	-	100.00%	0.00%
Business Edu. Partnership 22	58,656	25,379	33,277	43.27%	56.73%
Rapid Response ⁵	130,916	77,869	53,047	59.48%	40.52%
ARC Statewide	49,640	22,605	27,035	45.54%	54.46%
ARC Reboot	101,723	83,799	17,924	82.38%	17.62%
EARN Pool	1,364,165	964,066	400,099	70.67%	29.33%
EARN SNAP	41,764	36,578	5,186	87.58%	12.42%
Total OPERATIONAL EXPENSES	3,433,973	2,356,062	1,077,911	68.61%	31.39%

DIRECT CUSTOMER SERVICES ⁴					
Adult Pool	10,000	4,622	5,378	46.22%	53.78%
IS Youth Pool	9,071	1,634	7,437	18.01%	81.99%
TANF Youth	193,950	120,154	73,796	61.95%	38.05%
Dislocated Worker Pool	5,000	697	4,303	13.94%	86.06%
Apprenticeship Building America ⁶	2,582	2,582	-	100.00%	0.00%
ARC Reboot	7,102	1,229	5,873	17.30%	82.70%
EARN Pool	58,000	14,505	43,495	25.01%	74.99%
Total DIRECT CUSTOMER SERVICES	285,705	145,423	140,282	50.90%	49.10%
TOTAL EXPENDITURES	3,719,678	2,501,485	1,218,193	67.25%	32.75%

Central Susquehanna Intermediate Unit

	Total Budget - Original	Current Year Actual	Total Budget Variance - Original	Percent Total Budget Expended	Percent Total Budget Remaining
OPERATIONAL EXPENSES ²					
TANF Youth	191,857	61,827	130,030	32.23%	67.77%
OS Youth Pool	780,622	632,436	148,186	81.02%	18.98%
Total OPERATIONAL EXPENSES	972,479	694,263	278,216	71.39%	28.61%
DIRECT CUSTOMER SERVICES ⁴					
TANF Youth	59,937	31,650	28,287	52.81%	47.19%
OS Youth Pool	239,751	97,109	142,642	40.50%	59.50%
Total DIRECT CUSTOMER SERVICES	299,688	128,759	170,929	42.96%	57.04%
TOTAL EXPENDITURES	1,272,167	823,022	449,145	64.69%	35.31%

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® 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.

FY24 CONSOLIDATED TRAINING CONTRACT OBLIGATIONS
As of **4/26/2024**

Fund Source	Budget	Encumbrance	Actual	Total Obligation	Budget Available for Encumbrance	Number of Participants	Percentage of Total Budget Obligated
INDIVIDUAL TRAINING ACCOUNTS (ITAs)						FY24 ITA	
Adult	\$10,380	\$4,272	\$5,013	\$9,285	\$1,095	1	89.45%
Adult POS	\$195,320	\$47,192	\$128,075	\$175,268	\$20,052	61	89.73%
Dislocated Worker	\$105,424	\$11,435	\$22,216	\$33,651	\$71,773	11	31.92%
TOTAL ITA	\$311,123	\$62,899	\$155,304	\$218,204	\$92,920	73	70.13%

ON THE JOB TRAININGS (OJTs)						FY24 OJT	
Adult	\$33,587	\$6,818	\$23,481	\$30,299	\$3,287	4	90.21%
Adult POS	\$76,880	\$18,617	\$45,875	\$64,491	\$12,389	10	83.89%
Dislocated Worker	\$70,282	\$1,198	\$31,362	\$32,560	\$37,723	5	46.33%
Out of School Youth	\$92,067	\$23,997	\$28,070	\$52,067	\$40,000	10	56.55%
TOTAL OJT	\$272,816	\$50,629	\$128,788	\$179,418	\$93,398	29	65.77%
TOTAL ITA/OJT	\$583,939	\$113,529	\$284,092	\$397,621	\$186,318	102	68.09%

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	\$27,900	\$46,840	\$21,160	20	69%
	2023		\$18,940				
	2024		\$0				
Next Gen. Healthcare 2019	2024	\$65,501	\$0	\$0	\$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	\$537,301	\$0	\$46,840	\$46,840	\$490,461	20	9%



PA CareerLink[®] Operator Policy

Including Firewall Policy Stipulations

Effective April 2024

Developed by:
Central Pennsylvania Workforce Development Corporation, dba Advance Central PA

Equal opportunity employer/program. Auxiliary aids and services available upon request to individuals with disabilities. Program funded with federal dollars. For more information, visit: <https://advancecentralpa.org/about-us/public-notice/>

PA CareerLink® Operator Policy

Background

WIOA §121(d)(2)(A) requires that a One-Stop Operator must be competitively procured to coordinate services among One-Stop partners to promote efficiency and effectiveness, meet and exceed performance, including Common Measure performance, and assure continuous improvement by evaluation of performance to ultimately ensure high quality, effective services tailored to the needs of job seekers and businesses are being provided by the local One-Stop system.

The PA Department of Labor & Industry Workforce System Policy “Workforce Delivery System – PA CareerLink® System Operator” revised January 2021 provides information on the purpose, selection, responsibilities, evaluation, and oversight of the operator. It reinforces the required elements of competitive procurement, indicates the various roles an Operator may perform, lists eligible entities that may serve as an operator and identifies implications and conditions of selecting such entities.

One-Stop Operator Definition/Role

Also referred to locally as PA CareerLink® Operator, the One-Stop Operator is an entity or a consortium of entities that, at a minimum, includes three or more of the required one-stop partners of demonstrated effectiveness in the local area and is designated or certified under WIOA sec. 121(d).

The Operator’s singular required role can be summarized as service delivery coordination of PA CareerLink® partners and service providers.

Procurement

Advance Central PA complies with WIOA and state requirements that the Operator be competitively procured with agreement of the chief elected official (CEO) in strict alignment with procurement principles outlined in Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance) at 2 CFR part 200, including the US Department of Labor’s specific requirements at 2 CFR part 2900, and other applicable regulations and policies.

Eligible Entities

The operator must be either an entity (public, private, or nonprofit) or a consortium of entities. If the consortium of entities is one of the one-stop partners, it must at a minimum, include three (3) or more of the required one-stop partners of demonstrated effectiveness as described in WIOA section 678.400. All entities must sign the contract between the LWDB and the selected operator.

Coverage Area

Advance Central PA has the discretion to award contracts to one or more entities; each selected Operator must operate one or more PA CareerLink® locations.

Firewall Requirements

Advance Central PA strictly adheres to the specifications in § 679.430; that is Advance Central PA carries out responsibilities while demonstrating compliance with WIOA and corresponding regulations, Office of Management and Budget Circulars, and Conflict of Interest expectations.

As the governing entity, Advance Central PA has firewalls in place in regard to open and competitive competition and the subsequent direct oversight, monitoring, and evaluation of the Operator's performance.

Advance Central PA will never grant an Operator entity involvement in procurement or subsequent management of itself as the Operator or other service providers of Advance Central PA. Specifically, in alignment with regulations, the Operator cannot develop, manage, or conduct the competition of a service provider in which it intends to compete.

When a competitive procurement results in award of the Operator contract to an entity that is also a service provider, that entity must have internal controls and firewalls in place. Advance Central PA's contract rider with the selected entity includes the requirement that a firewall is in place and that all duties must be carried out objectively.

The required firewall means that the Operator entity or consortium of entities has internal controls to prevent conflict of interest and/or perception of conflict of interest, including via clear separation of duties.

The Operator must disclose to Advance Central PA any potential conflicts of interest arising from the relationships of the Operator with particular training service providers or other services providers per WIOA §121(d)(4)(A).

The contract with the selected entity serves as the written agreement between the selected Operator and Advance Central PA in order to hold the Operator to strict adherence to firewalls, internal controls, and protections against potential conflict of interest as well as the overall role and duties. The Operator must expressly follow all federal, state, and local policies, including this Operator Policy.

The Operator must effectively carry out all duties and responsibilities objectively with effective firewall in place.

Evaluation

Advance Central PA will evaluate compliance and effectiveness of the Operator. Advance Central PA will formally monitor the Operator at least once per fiscal year to ensure high-quality performance and accountability. Advance Central PA's assessment of performance will include but is not limited to: adherence to contract provisions; responses from participating partner surveys, other performance measures developed by Advance Central PA, and successful PA CareerLink® certification via Advance Central PA's robust process.

Further, Advance Central PA meets with the Operator regularly to keep a pulse on maintenance of the firewall, performance, continuous improvement, attainment of goals, and adherence to contract expectations.

Role of the PA CareerLink® Operator

Per §678.620 the Operator will coordinate the service delivery of required partners and service providers ensuring a seamless distribution of career services, training services and other employment-related services provided by required and additional partner programs offered in the local area.

The Operator duties will be carried out under the oversight and governing authority of Advance Central PA.

Following is an outline of the Operator's role and duties. The Operator must act in the best interests of the PA CareerLink® network, not a single entity, in alignment with the vision and expectations of Advance Central PA.

Administration

- **Serve as a Firewall/Maintain a Firewall**

See above section.

- **Relationship with Advance Central PA**

The Operator will work collaboratively with Advance Central PA; convene regularly scheduled meetings with Advance Central PA staff; present reports in formats approved by Advance Central PA in regard to coordination of services, adherence to the MOU, performance outcomes, initiatives and other business; and attend Advance Central PA quarterly LEO/WDB meetings and other committee meetings as requested. The Operator will ensure Advance Central PA's vision and performance and quality expectations remain in the forefront and are addressed.

- **Provide adequate staffing to fulfill the Operator Role in the central PA CareerLink® System**

The Operator will provide adequate staffing to fulfill required duties.

The Operator will have functional supervision of the Administrators. The Operator will ensure they are well informed of Advance Central PA initiatives, state, local and federal policies, etc. and convene the Administrators regularly to stay well informed of challenges and successes in each site and facilitate collaboration and sharing of best practices.

Should an Administrator position become vacant, Advance Central PA and the Operator shall collectively agree in the selection of a new Administrator. This Administrator will be employed by Advance Central PA; the Operator will assume functional supervision.

- **Make recommendations for continuous improvement**

The Operator will continually assess and evaluate the effectiveness of the overall PA CareerLink® network in Central PA and make recommendations to Advance Central PA that will result in improvement. Areas to be evaluated include but are not limited to: partner collaborations, cross-training and staff development, customer service, removing barriers and making processes leaner and more efficient to all customers, serving individuals with barriers effectively, outreach to the community and public, etc.

- **Operating Budgets/ Resource Sharing Agreements**
Assist Advance Central PA in the preparation and maintenance of the PA CareerLink® Operating Budgets so that needs in each site are clearly communicated.
- **Understand the role and services provided by each required one-stop partner**
The Operator must know and understand the parameters under which the required partners provide services; effectively interface with all required partners; ensure that the role of all required partners in the PA CareerLink® has been defined, identified and integrated into the service delivery system.

Coordination

- **Coordinate and support the service delivery of all required one-stop partners and service providers in accordance with the MOU**
Understand each partner's performance; understand each partner's strategic vision; coordinate service delivery among partners; assure support for all one-stop partner initiatives and programs; bring PA CareerLink® partners together within a one-stop operational environment and actively assist in improving upon existing integrated relationships.
- **Establish and maintain relationships to adequately coordinate service providers across the one-stop delivery system**
Coordinate service providers, including those who are not co-located, and help them connect to the overall system.

The Operator shall continuously improve so that all partners are aware of the role of the Operator and know the Operator staff and how to contact them.

- **Intermediary**
The Operator must serve as an unbiased intermediary/liaison for all the one-stop partners and service providers.
- **Meetings**
The Operator must participate in partner and service provider meetings, or stay highly attuned through the Administrators.
- **Ensure quality operational procedures are in place, including referral processes**
The Operator must monitor operational procedures and protocols that promote effective and seamless partner referral, for the benefit of the customer, while ensuring individual partner program performance and outcomes are not negatively impacted.
- **Memoranda of Understanding**
Track and implement required negotiated One-Stop Partner Memoranda of Understanding (MOU) with all core partners operating in the PA CareerLink®; implement and monitor the integrated services structure in accordance with the MOU; notify Advance Central PA of any issues related to partners' adherence to the terms of the MOU or policies.
- **Priority of service**
Assure the PA CareerLink® network is operationally functioning to adequately and effectively serve all individuals, including those who meet statutory priority of service and those with barriers to employment.

- **Communication**

Provide avenues of communication so that one-stop partners and service providers are informed of Advance Central PA and other workforce development stakeholders' activities, etc.

Managerial

- **Supervision**

The Operator provides functional supervision to PA CareerLink® Administrators which involves regular formal and informal communications and oversight.

- **Compliance**

Ensures compliance with federal, state, and local policies, plans, strategies, etc.

- **Certification**

Assure compliance with Commonwealth and Advance Central PA certification policy, guidance, and criteria which is essential to the receipt of funding for infrastructure; comply with Advance Central PA certification processes/surveys.

- **Equal Opportunity**

Assures equal opportunity and non-discrimination laws, policies, and plans are strictly adhered to so that equal opportunity and access in the CareerLink® network is unquestioned and accommodations are readily available.

- **Service delivery evaluation**

Track and evaluate service delivery (e.g. timing, type, format, etc.) across providers and partners as well as across customer segments, and identify opportunities to optimize services and improve provider flexibility in meeting customer needs; identify areas of duplication; develop meaningful metrics and goals for Advance Central PA consideration; and make recommendations to Advance Central PA.

- **Develop, implement and monitor customer service standards**

Continuously and intentionally assess customer needs via customer feedback mechanisms while engaging all partners and make recommendations to Advance Central PA for continuous improvement.

Public Relations

- **Ambassador**

Actively advocate for the PA CareerLink® system and partners, acting as an ambassador for the system within the communities served; stay knowledgeable regarding upcoming community events and assure all appropriate partners are informed and participate; communicate PA CareerLink® services and activities to the community.

Limitations/Prohibited Roles

The Operator reports to Advance Central PA and is expressly prohibited from performing the following functions. This list is not exhaustive.

- Manage or significantly participate in the competitive selection process for the Operator
- Select or terminate an Operator, Career Services, Youth Providers, etc.
- Develop and submit an Operating Budget for local activities (but may provide financial records to Advance Central PA)
- Be responsible for oversight of itself or other Operators
- Negotiate local and/or regional performance accountability measures
- Convene system stakeholders to assist in the development of WIOA plans
- Prepare and submit WIOA plans