

Policy & Performance Committee

Agenda

Zoom Video Conference Meeting
Thursday, August 28, 2025 9:00 a.m.

Introduction & Call to Order	J. Beamer
Public Comment	
Review & Approval of Meeting Minutes	J. Beamer
Customer Appeal of Previous Committee Decision <ul style="list-style-type: none">Executive Session: Consideration of Appeal	M. O'Hargan/ E. Mulberger
Open Discussion	J. Beamer
Date of Next Meeting <ul style="list-style-type: none">To be Determined	J. Beamer
Adjournment	J. Beamer

Policy & Performance Committee

Meeting Notes

May 10, 2023

The Policy & Performance Committee of Advance Central PA held a meeting on Wednesday May 10, 2023 at the Advance Central PA office, 130 Kelly Square Suite 1, Lewisburg, PA.

The following members attended:

Jim Beamer
Suzanne White
Jenna Witherite

The following members were excused:

Zollie Rayner

The following staff attended:

Korrie Lucas
Kelly Walter

The following guests attended:

Proceedings

The meeting was called to order at 10:17 a.m. by Jim Beamer, Policy & Performance Committee Chair.

Public Comment

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

Review & Approval of Meeting Minutes



Suzanne White made a motion to approve the November 7, 2018 Policy & Performance Committee meeting minutes. Jenna Witherite seconded the motion. The motion was unanimously approved with no abstentions.

Policy & Performance Committee Updates & Action Items

OJT Policy Review

Korrie Lucas, Advance Central PA Assistant Director, provided an overview of both the On-the-Job Training (OJT) policy and the Individual Training Account (ITA) Policy, both previously updated in December of 2019. These changes were initiated by a call with Pennsylvania Labor and Industry (L&I) after concerns of other boards having low participation rates. Several Advance Central PA staff, other boards and the Business Solutions Team gathered thoughts together and came up with their best suggestions.

Employer Eligibility

Korrie went over recommended changes for the OJT Policy. In the past, Advance Central PA has had to ban employers from participating in OJT. She asked for consideration adding a sentence that allows for permanent disqualification for glaring issues with Executive Director approval.

When looking at what other boards do, it was found that one of them had 75 of their OJT contracts with one company. Korrie recommended removing the requirement for Executive Director approval when a single employer wants to enter into more than one simultaneous OJT contract. Instead, asked what is an appropriate cap on simultaneous and overall OJT contracts? After discussion about businesses needing more than one OJT at a time but also putting a cap on it because a small business could try to make half of their workforce OJT accounts, they decided to use a percentage to alleviate the issue. 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.

There was some discussion about Advance Central PA's new Outreach Coordinator coming at a great time to bringing more OJT's into the program. There are new businesses coming to the area and this could be a great way to get their foot in the door and start successfully with a few OJT contracts. At this point we can fund 50-60 contracts in a year.

Participant Eligibility

A sentence will be added to clarify that Dislocated Workers, Out-of-School Youth, and EARN participants (funded by EARN) are eligible for OJT without regard to income.

There was discussion on making the WorkKeys® assessment one of the options available for case managers to consider in helping to determine successful OJT placement rather than a requirement. Once EARN staff qualify a member, they wouldn't need to go through another set of questions.

If a participant has an Individual Training Account (ITA) and needs additional training for a specific job. OJT funds may be available, however, that individual cannot receive funding for ITA and OJT simultaneously.

Under the Job Matching section, the committee considered adding language to describe the expectations for Job Seeker Services staff to have everything for the participants in place at the time of the Match Meeting. At this point the Business Services Team (BST) is brainstorming to make this a goal, and the Job Seekers Staff are helping to implement it.

New Section Regarding Registered Apprenticeship (RA)

Korrie asked that a new section be added to clearly explain that a RA can receive OJT funding and that all other policy considerations apply. This will help PA CareerLink® staff handle requests for OJT funds for an apprentice already in a registered program. It is something that the state wants and we need to show them that we have an Apprenticeship Policy. There was a question about if this should be a separate policy and noted to come back to this at a later date.

Master Contract

Concern over the signatory for an OJT contract being up to date prompted a master contract addition. This would prevent a document from getting too old. 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. In circumstances such as acquisition or other major changes, a new contract would need to be obtained.

Contact Package Formatting

The staff will have the ability to make formatting and editing changes that will allow for ease of use and understanding of the policy.



Jenna Witherite made a motion to approve the revisions to the Advance Central PA On-the-Job Training Policy as presented. Suzanne White seconded the motion. The motion was unanimously approved with no abstentions.

ITA Policy Review

Participant Eligibility

Several items were discussed for updating the wording to make it clearer. Specifically, when the Standard Occupation Code (SOC) is different than what is listed on the High Priority Occupation (HPO) list or O*Net and cannot be found by the subcontractor. There was also discussion on the WorkKeys® Foundational Skills Assessments section to allow assessments best for the individual, such as TORQ, Title II facilitated assessments, and WorkKeys®.

Clearance and Background Checks

Some expectations and timelines were discussed to help staff with compliance. A section will be added to acknowledge that clearances may take more time to receive than expected. In such cases, the subcontractor is advised to submit the ITA contract with a clear Commonwealth Workforce Development System (CWDS) case 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. A requirement will be added for subcontractor staff to clearly document the guidance and timelines given to participants as evidence that processes were started in a timely manner.

The links for the three websites will be added for easy access to perform clearance and background checks.

Training Provider Eligibility

Clarification will be added within the Training Provider Eligibility List (ETPL) 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

A new chart has been added to clear up confusion about the number of weeks an ITA is eligible for funding.

Clarification for ITA has been made; it 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

A question was raised about the funding limits being relevant at this point. The committee has tabled this topic but realizes that it is a discussion that needs to be had.

Support Services

Supportive Services has had a \$500 limit for some time with exceptions for different circumstances. A change will be made to allow books to be purchased in hard copy or digital form and allow book rental as well as purchase. Edits will also be made to Attachment A, Support Services form.

New Section with Clarifications Regarding Registered Apprenticeship

Clarification will be added for an apprentice who is an incumbent worker, and therefore not eligible for OJT funds, to be eligible for an ITA at the start of the RA, even if the RA is considered long-term in length. 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.

Tuition Refund Protocol

A situation has arisen where a school wanted to give a refund to the student. The refund process must be clearly defined. If there is a refund for tuition paid, including for a circumstance where someone withdrew or did not complete, Advance Central PA shall receive the training provider's refund first. If the refund amount is greater than the amount of the ITA, the participant shall receive the remainder.

ITA Tracking Sheet Usage

A section will be added to the procedure for the ITA Tracking Sheet. This will include a requirement for accurately updated within seven days of any change.

Funding a Repeat Course

Confirmation will be made within the policy, of a committee decision made in May 2017, allowing staff to review 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."

Contract Package Formatting

The staff will have the ability to make formatting and editing changes that will allow for ease of use and understanding of the policy.



Suzanne White made a Motion to approve the revisions to the Advance Central PA Individual Training Account Policy as presented. Jenna Witherite seconded the motion. The motion was unanimously approved with no abstentions.

Open Discussion

There was none.

Date of Next Meeting

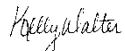
LEO Meeting/Annual Meeting of the Members – June 21, 2023 at 9:00 a.m.

Joint WDB/LEO Board – June 21, 2023 at 10:00 a.m.

Adjournment

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

Respectfully Submitted,



Kelly Walter, Office/Board Coordinator