

Central Western Maine Workforce Development Board
Quarterly Workforce Board Meeting Agenda

April 28, 2022, at 8:30am – 10:30am

Zoom Meeting

<https://us02web.zoom.us/j/84889028595?pwd=U3NUcTI5TjBNUXVjQStUeWhHUS9CUT09>

Desired Outcomes:

- 1) Board members to step up and offer time.
- 2) Identify someone to take on the following board role: Board Chair
- 3) Confirm committee appointments.
- 4) Operations Committee receive referrals from board members for the Executive Director role.

Agenda

1. **Welcome, Call to Order**
2. **Group Updates – 15 min**
Share your name, affiliation, and an update relevant to workforce development
3. **Approve Last Meeting Minutes: January 24, 2022 (action)**
4. **Board Chair Updates – 15 min**
5. **Discussion Items (action) - 45 min**
 - a. Central Western Maine Workforce Initiatives Bylaws
 - b. Central Western Maine Program Policies
 - ☐ Individual Training Accounts Policy
 - ☐ Supportive Services Policy
 - ☐ On-the-Job Training Policy
 - ☐ Customized Training Policy
 - ☐ Youth Incentives Policy
6. **Performance & Spending Update – 15 min**
7. **Finance Update – 10 min**
8. **High Risk Letter & PY18 PY19 Monitoring Update – 10 min**
9. **Continued Board Education - 10 min**
10. **Other/New Business**
 - a. Access to Microsoft Teams for board documents
 - b. Committee & Focus Group Appointments
11. **Adjourn Meeting**

Next Board Meeting Date: June 23, 2022, 8:30 am – 10:30 am

Central Western Maine Workforce Development Board
Workforce Board Quarterly Meeting Minutes
January 27, 2022
Via Zoom Video Technology

Board Members Present: Kelly Aho, Acting Chair/Treasurer; Grant Provost, Vice Chair; Razell Ward, Secretary; Laurie Glidden, At-Large Member; Andrea Patstone; Sue LeClair; Trampas Hutches; Kendra Wheeler; Cathy Witherspoon; Diane Frigon; Kim Lindlof; Josh Henry; Bruce Noddin; Jim Trundy; Bruce Tisdale; Harvey Smith

Board Members Absent: Peter Wright; Nick Paquet

Staff Present: Blaine Flanders, Interim Executive Director

Others Present: Sara McLaughlin, Contractor; Susan Cerini, EMDC; Tom Fernands, EMDC

1. Call to Order

Chair Kelly Aho opened the meeting at 9:00am.

2. Welcome and Introductions

Blaine Flanders welcomed the four new board members: Andrea Patstone, Bruce Tisdale, Christopher Winstead, and Kelly Zolad. She then encouraged all board members to share their name, affiliation, and why they are a member of the CWMWDB:

- Andrea Patstone: President of Stephens Memorial, Western Maine Health in Norway, ME, part of the Maine Health System
- Chris Winstead: Deputy Executive Director for Workforce Development and Training at the Harold Alford Center, within the Maine Community College System
- Kelly Zolad: Director of Sunday River
- Razell Ward: Lewiston Adult Education, Workforce Projects
- Sue LeClair: CareerCenter Manager for Kennebec Valley and Augusta sites, for MDOL
- Kendra Wheeler: Branch Manager, Bangor Savings Bank, both Lewiston and Auburn Branches
- Kim Lindlof: President and CEO of Mid-Maine Chamber of Commerce, Executive Director at Central Maine Growth Council, State Workforce Board member, and Mid-Maine Regional Adult and Community Education Board member, and works with a Workforce Practitioners Group
- Cathy Witherspoon: CHRO for Boyne Resorts: Sugarloaf, Sunday River, and Shawnee Peak
- Diane Frigon: Bureau of Rehabilitation Services, MDOL
- Trampas Hutches: President of Franklin Community Health Network in Farmington, ME
- Steve Jorgensen: President and CEO of St. Mary's Medical Center in Lewiston, ME
- Laurie Glidden: Manage the Family Self-Sufficiency Program, Maine Housing
- Joshua Henry: President and CEO of GO Lab, Timber HP in Madison, ME
- Bruce Noddin: Executive Director, Maine Prisoner Re-Entry Network
- Jim Trundy: Executive Director, Western Maine Community Action
- Bruce Tisdale: Founder of Mountain Machine Works in Auburn, ME

- Grant Provost: Business Agent for Ironworkers Local 7, AFL-CIO Executive Board member, State Workforce Board member, State Construction Board member, Road Map Advisory Committee member for Offshore Wind for the State of Maine
- Harvey Smith: Kennebec Technologies
- Kelly Aho: Director, TalentLaunch

3. Board Chair Update

- Staffing Updates:** The Operations Committee has decided to invite Blaine Flanders on board as the Interim Executive Director. She is receiving a weekly stipend. Executive Director, Stacy Kilroy has resigned from the board as of December 15, 2021. There are a few staff openings currently, with the resignations of Tobin Williamson, Erica McCarthy, and Stacy Kilroy last month. We will need support from the board to make decisions on the direction this organization should work toward. Please refer staff candidates to Kelly Aho and the Operations Committee. Kelly will send job descriptions to board members when they are finalized.
- Accountant Contract:** Sara McLaughlin has contracted with the board as the CWMWDB financial consultant.

Razell Ward suggested that the board members break up some of the work that Ms. Aho and Ms. Flanders are working on.

4. Review and Approve Last Meeting's Minutes

VOTED: *To approve the October 27, 2021 meeting minutes as written, to include that Harvey Smith was not present.*

Motion: Razell Ward Second: Grant Provost Vote: All in Favor

5. Discussion Items

- Staff Retirement/Employer Match:** Ms. Flanders shared her screen, with the proposed 403(b) retirement employer match rate sheet. The proposed rate for time period, backdated, from 7/1/2021 to 6/30/2022 is \$275/month employer match for employees who contributed >\$25/pay period. It is noted that the cycle of board approval for the employer contribution needs to be discussed and voted on by the full board prior to the first of the program year, starting July 1 annually, regardless if there are staff to enroll in the employer match at that given time. Ms. Lindlof: Without knowing salaries of staff, how do we know how generous this it? She thought it was high to give. Ms. Wheeler: Should we have a uniform percentage of salary instead of a set amount? Ms. McLaughlin: It can be written however the board decides it to function. Ms. Aho: We need to recognize that other staff may onboard, and enroll in this plan, therefore we would pay more into this plan overall. Ms. McLaughlin: If a staff member inputs \$25/pay period, a total of \$650 per year, the staff member then receives 12 monthly matches of \$275, the employee gets a match of \$3300 total in a year. Mr. Jorgenson: Expressed interest in knowing the pay scale of existing staff members and clarified that an 'employer match' should be simply a 'match'. Ms. Ward: Can a committee work on the next program year employee match rate? Ms. Flanders: Yes, the finance focus group could focus on this brainstorming and work. Mr. Winstead: Stated

this program does align with other non-profits and allows us to compete with other opportunities. Mr. Henry: I don't think this is particularly rich, there is a competitive workforce. For example, UMaine provides 10% match and private sector provides a higher scale match.

VOTED: *To approve the proposed employer match rate for the time period 7/1/2021 to 6/30/2022, as a \$275/month employer match for employees who contributed >\$25/pay period.*

Motion: Joshua Henry Second: Grant Provost Vote: All in Favor

- b. **Stacy Kilroy's Resignation as of December 15, 2021:** mentioned above in Board Chair Updates: Ms. Aho explained the board Operations Committee has been working with an attorney for the past few months. Stacy submitted her resignation and dated it 12/14/2021. It was recommended we have the full board accept and vote on this resignation.

VOTED: *To approve the proposed employer match rate for the time period 7/1/2021 to 6/30/2022, as a \$275/month employer match for employees who contributed >\$25/pay period.*

Motion: Kim Lindlof Second: Harvey Smith Vote: All in Favor

- c. **Grievance Policy:** Ms. Flanders stated that the MDOL pre-approved this policy, and the Operations Committee had also approved this draft. We are looking for a motion to approve.

VOTED: *To approve the CWM Local Area Grievance Policy as written in the January 27, 2022, board packet.*

Motion: Laurie Glidden Second: Christopher Winstead Vote: All in Favor

6. Program Performance Presentation & Success Story

Ms. Flanders shared the performance measure table, including the goal, actual, and % attained. Mr. Fernands explained the different structure pieces of the table. The data shows all three grant contracts that EMDC has currently with CWMWDB: WIOA Adult, Dislocated Worker, and Youth, COVID-19 NDWG, and the Opioid Connecting with Opportunities NDWG. Susan Cerini discussed that the WIOA Youth is struggling to make enrollments and goals but are working to increase the amount of youth outreach. This is not from a lack of trying, but OSY eligibility is difficult to meet, and we are hoping to gain more referrals from our partners in the region. Mr. Henry asked for an acronym key in this table, and suggested seeing this data in a graph format in order to identify trends or problem areas. Ms. Wheeler asked for clarification line-by-line on the table, and Ms. Flanders added that would be covered at orientation in February.

7. Finance Update

- a. **CWMWI:** Ms. McLaughlin explained that WIOA is the Workforce Innovation and Opportunity Act, which is formula funding, funding that automatically goes to workforce boards, for adults, dislocated workers, and youth. CWMWI has three discretionary grants currently: COVID NDWG, Opioid NDWG, and CAREER NDWG. WIOA funds do not need to be spent proportionally between the admin versus program funds, however the discretionary grants need to be spent in

proportion of % spent. If discretionary grants are not spent in proportion, whatever the difference is, we will need to pay back the difference to our contract holder: MDOL. Our Service Provider, EMDC, has a contract for each grant, receiving 90% of funds, and the CWMWI keeps 10% of funds for administrative cost. EMDC had a hard time spending the full WIOA PY19 funds, and right now they are behind in spending PY20, especially for WIOA youth. When the PY20 contract is completely spent, EMDC will start spending in the WIOA PY21 contract. The CWMWI receives WIOA contracts annually, each for a two-year period. Ms Glidden: What are the repercussions if we don't spend all our contractual funding? If the discretionary funds are not spent 100% by both the CWMWI and Service Provider (EMDC) we will return to the State. Unfortunately, if we spend less than 100%, this could affect our chances for funding in the future, and the state/feds might be less likely to give money to this region. This theory does not apply to WIOA, however funds will be sent back to the MDOL after the end of the contract. At that time, MDOL will have one additional year to spend the remaining funds that workforce boards do not spend.

- b. **Service Provider:** review above.

Chair Kelly Aho extended the board meeting until 10:30 AM.

8. High-level Board Overview

- a. **Local Workforce Board Defined:** Ms. Flanders reviewed the goals for the next three months: 1) board orientation, 2) committee and focus group development, 3) improving internal operations and reviewing governance documents, 4) developing a response to MDOL for the High-Risk Letter, 5) finalize annual calendar, 6) finish triage item task list, and 7) develop staff roles and start the hiring process. Six months from now, I would like to: 1) implement the MOU with our OneStop Partners, 2) develop the IFA with OneStop Partners, 3) start the local plan development, 4) create the PY22 budget, 5) develop a plan and action steps to increase enrollments across all grants, 6) research additional funding opportunities, and 7) hire and train new staff.
- b. **Roles & Responsibilities Review with Ginny Carroll, MDOL:** Ms. Flanders shared her screen, showing the CWMWDB Roles & Responsibilities, EDU #22-01 for CWMWDB Education. The purpose of this document is for anyone who comes in contact with the Workforce Board, including the CEO Board, staff, contractors, and board members, to know the roles and functions of the Workforce Board as required by federal law. Ms. Flanders reviewed the purpose of the document, and oriented board members to the document. Ginny Carroll presented the functions of the Workforce Board, as also discussed in EDU #22-01. All workforce board functions can also be found here: [eCFR :: 20 CFR 679.370 -- What are the functions of the Local Workforce Development Board?](#)
Workforce Board Functions reviewed:

- Develop a 4 year local plan
- Conduct workforce research and labor market analysis
- Convene local stakeholders
- Engage employers
- Lead efforts to develop career pathways

- Identify and promote best practices
- Maximize accessibility and effectiveness through technology
- Work in partnership with CEO Board Commissioners (several tasks)
- Negotiate Performance Levels
- Negotiate MOU and cost sharing
- Select providers
- Assess accessibility of local CareerCenters
- Develop a budget for the local board
- Certify OneStops

9. Committee & Engagement: Poll Interest

Tabled to email due to time constraints.

10. Other/New Business

Susan Cerini will be transitioning from EMDC to Eastern Maine Community College as the Dean of Workforce.

11. Adjourn

Chair Kelly Aho adjourned the meeting at 10:30 am.

Next CWMWDB meeting: April 28, 2022, 8:30 AM – 10:30 AM.

CENTRAL WESTERN MAINE WORKFORCE INITIATIVES

~~77 Winthrop Street~~
~~Augusta, ME 04330~~ P.O. Box 7083
Lewiston, ME 04240

BY-LAWS

PREAMBLE

ARTICLE I: ORGANIZATION

1.1 Name. The name of the organization shall be Central/Western Maine Workforce Initiatives (“CWMWI”).

1.2 Not-for-Profit. CWMWI has been organized under Title 13-C of the Maine Revised Statutes as a not-for-profit corporation in compliance with the laws of the State of Maine, and the requirements of the Workforce Innovation and Opportunity Act (“WIOA”), as codified at 29 U.S.C. § 3101 *et seq.*, as well as appropriate regulations promulgated by the Maine Department of Labor (“~~ME~~-DOL”).

ARTICLE II: PURPOSE, AUTHORITY & FUNCTIONS, STAFF

2.1 Purpose. CWMWI is established and organized to administer Title 1B Adult, Dislocated Worker and Youth Employment and Training and Emergency Dislocated Worker Programs of WIOA for Androscoggin, Franklin, Kennebec, Oxford and Somerset Counties in the State of Maine (“the Central/Western Region”) in partnership with the region’s Chief ~~Local~~ Elected Officials (“~~CLEOs~~”). CWMWI may also undertake public charitable activities, grants, and projects to complement its primary purpose. CWMWI seeks to create a dynamic, integrated workforce investment and development system that meets the changing needs of businesses and individuals in the Central/Western Region and provides appropriate resources to support ongoing economic development.

2.2 Authority & ~~Duties~~ Functions. CWMWI shall perform all the functions and duties of a local workforce development board as defined and mandated by WIOA, including without limitation the obligations in 20 CFR §679.370, 29 U.S.C. §§ 3122 and 3123, and corresponding enabling regulations. As provided in WIOA sec. 107(d), the Local WDB must:

- (a) Develop and submit a 4-year local plan for the local area, in partnership with the chief elected officials and consistent with WIOA sec. 108;
- (b) If the local area is part of a planning region that includes other local areas, develop and

submit a regional plan in collaboration with other local areas. If the local area is part of a planning region, the local plan must be submitted as a part of the regional plan;

- (c) Conduct workforce research and regional labor market analysis to include:
 - i. Analyses and regular updates of economic conditions, needed knowledge and skills, workforce, and workforce development (including education and training) activities to include an analysis of the strengths and weaknesses (including the capacity to provide) of such services to address the identified education and skill needs of the workforce and the employment needs of employers;
 - ii. Assistance to the Governor in developing the statewide workforce and labor market information system under the Wagner-Peyser Act for the region; and
 - iii. Other research, data collection, and analysis related to the workforce needs of the regional economy as the WDB, after receiving input from a wide array of stakeholders, determines to be necessary to carry out its functions;
- (d) Convene local workforce development system stakeholders to assist in the development of the local plan under § 679.550 and in identifying non-Federal expertise and resources to leverage support for workforce development activities. Such stakeholders may assist the Local WDB and standing committees in carrying out convening, brokering, and leveraging functions at the direction of the Local WDB;
- (e) Lead efforts to engage with a diverse range of employers and other entities in the region in order to:
 - i. Promote business representation (particularly representatives with optimum policy-making or hiring authority from employers whose employment opportunities reflect existing and emerging employment opportunities in the region) on the Local WDB;
 - ii. Develop effective linkages (including the use of intermediaries) with employers in the region to support employer utilization of the local workforce development system and to support local workforce investment activities;
 - iii. Ensure that workforce investment activities meet the needs of employers and support economic growth in the region by enhancing communication, coordination, and collaboration among employers, economic development entities, and service providers; and
 - iv. Develop and implement proven or promising strategies for meeting the employment and skill needs of workers and employers (such as the establishment of industry and sector partnerships), that provide the

skilled workforce needed by employers in the region, and that expand employment and career advancement opportunities for workforce development system participants in in-demand industry sectors or occupations;

- (f) With representatives of secondary and postsecondary education programs, lead efforts to develop and implement career pathways within the local area by aligning the employment, training, education, and supportive services that are needed by adults and youth, particularly individuals with barriers to employment;
- (g) Lead efforts in the local area to identify and promote proven and promising strategies and initiatives for meeting the needs of employers, workers and job seekers, and identify and disseminate information on proven and promising practices carried out in other local areas for meeting such needs;
- (h) Develop strategies for using technology to maximize the accessibility and effectiveness of the local workforce development system for employers, and workers and job seekers, by:
 - i. Facilitating connections among the intake and case management information systems of the one-stop partner programs to support a comprehensive workforce development system in the local area;
 - ii. Facilitating access to services provided through the one-stop delivery system involved, including access in remote areas;
 - iii. Identifying strategies for better meeting the needs of individuals with barriers to employment, including strategies that augment traditional service delivery, and increase access to services and programs of the one-stop delivery system, such as improving digital literacy skills; and
 - iv. Leveraging resources and capacity within the local workforce development system, including resources and capacity for services for individuals with barriers to employment;
- (i) In partnership with the chief elected official for the local area:
 - i. Conduct oversight of youth workforce investment activities authorized under WIOA sec. 129(c), adult and dislocated worker employment and training activities under WIOA secs. 134(c) and (d), and the entire one-stop delivery system in the local area;
 - ii. Ensure the appropriate use and management of the funds provided under WIOA subtitle B for the youth, adult, and dislocated worker activities and one-stop delivery system in the local area; and
 - iii. Ensure the appropriate use management, and investment of funds to maximize performance outcomes under WIOA sec. 116;
- (j) Negotiate and reach agreement on local performance indicators with the chief elected

- official and the Governor;
- (k) Negotiate with CEO and required partners on the methods for funding the infrastructure costs of one-stop centers in the local area in accordance with § 678.715 of this chapter or must notify the Governor if they fail to reach agreement at the local level and will use a State infrastructure funding mechanism;
 - (l) Select the following providers in the local area, and where appropriate terminate such providers in accordance with 2 CFR part 200:
 - i. Providers of youth workforce investment activities through competitive grants or contracts based on the recommendations of the youth standing committee (if such a committee is established); however, if the Local WDB determines there is an insufficient number of eligible training providers in a local area, the Local WDB may award contracts on a sole-source basis as per the provisions at WIOA sec. 123(b);
 - ii. Providers of training services consistent with the criteria and information requirements established by the Governor and WIOA sec. 122;
 - iii. Providers of career services through the award of contracts, if the one-stop operator does not provide such services; and
 - iv. One-stop operators in accordance with §§ 678.600 through 678.635 of this chapter;
 - (m) In accordance with WIOA sec. 107(d)(10)(E) work with the State to ensure there are sufficient numbers and types of providers of career services and training services serving the local area and providing the services in a manner that maximizes consumer choice, as well as providing opportunities that lead to competitive integrated employment for individuals with disabilities;
 - (n) Coordinate activities with education and training providers in the local area, including:
 - i. Reviewing applications to provide adult education and literacy activities under WIOA title II for the local area to determine whether such applications are consistent with the local plan;
 - ii. Making recommendations to the eligible agency to promote alignment with such plan; and
 - iii. Replicating and implementing cooperative agreements to enhance the provision of services to individuals with disabilities and other individuals, such as cross training of staff, technical assistance, use and sharing of information, cooperative efforts with employers, and other efforts at cooperation, collaboration, and coordination;
 - (o) Develop a budget for the activities of the Local WDB, with approval of the chief elected official and consistent with the local plan and the duties of the Local WDB;
 - (p) Assess, on an annual basis, the physical and programmatic accessibility of all one-stop

centers in the local area, in accordance with WIOA sec. 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.); and

(q) Certification of one-stop centers in accordance with 20 CFR § 678.800.

2.3 Staff. The work of CWMWI and the Central/Western Workforce Development Board (the “Workforce Board”) shall be supported in the performance of its duties by a full-time staff, employed by CWMWI, including the Executive Director of CWMWI and such other staff determined to be necessary by the ~~CEOs Board of Directors~~. The staff shall be responsive to the needs of the Workforce Board and shall support the Workforce Board in all of its mandated functions.

ARTICLE III: CENTRAL/WESTERN MAINE WORKFORCE DEVELOPMENT BOARD

3.1 ~~CWMWI shall be managed and operated~~ Chief Elected Official Board shall provide oversight and financial responsibility to the CWMWI and the Central Western Maine Workforce Development Board shall perform the above-mentioned federal Workforce Board functions by the Central Western Maine Development Board (the “Workforce Board”).

3.2 Appointment and Term. Members of the Workforce Board shall be appointed by the ~~CLEOs~~ for a term of three years or less, in the case of vacancies, if, at the discretion of the ~~CLEOs~~ a shorter term is necessary to maintain staggered appointments. Appoints shall be staggered such that approximately one-third of the Workforce Board members are subject to replacement or reappointment each year.

3.3 Resignation/Termination/Vacancies. Members of the Workforce Board may resign membership, officer positions, chair roles, or other duties upon ~~written~~ electronic notice ~~received by to the Executive Director and~~ Board Chair. Membership, officer positions, and chair roles- in the Workforce Board may be terminated for no reason or any reason by a majority vote of Workforce Board members. Missing three consecutive meetings also constitutes a resignation. The ~~CLEOs~~ shall be promptly notified of any vacancies, and replacements shall be appointed within ninety (90) days.

3.4 Composition of Workforce Board. The Workforce Board shall be comprised of a minimum of 20 and a maximum of 25 members. In accordance with WIOA Section 107(b), 20 CFR 679.320 and as codified at 29 U.S.C § 3123(b). ~~T~~the Workforce Board shall be

composed such that:

- ~~1) A majority of the members shall be representatives of business in Central/Western Region, who:
 - ~~a) are owners of businesses, chief executives or operating officers of businesses, or other business executives or employers with optimum policymaking or hiring authority;~~
 - ~~b) represent businesses, including small businesses, or organizations representing businesses described in this clause, that provide employment opportunities that, at a minimum, include high quality, work relevant training and development in in-demand industry sectors or occupations in the local area; and~~
 - ~~c) are appointed from among individuals nominated by local business organizations and business trade associations;~~~~

- ~~2) Not less than 20 percent of the members shall be representatives of the workforce within Central/Western Region, who:
 - ~~a) shall include representatives of labor organizations, who have been nominated by local labor federations, or other representatives of employees;~~
 - ~~a) shall include a representative, who shall be a member of a labor organization or a training director, from a joint labor-management apprenticeship program, or if no such joint program exists, such a representative of an apprenticeship program in the Central/Western Region, if such a program exists;~~
 - ~~b) may include representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment needs of individuals with barriers to employment, including organizations that serve veterans or that provide or support competitive integrated employment for individuals with disabilities; and~~
 - ~~c) may include representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth;~~~~

- ~~3) The Workforce Board shall include representatives of entities administering education and training activities in the local area, who:
 - ~~a) shall include a representative of eligible providers administering adult education and literacy activities under subchapter II;~~
 - ~~b) shall include a representative of institutions of higher education providing workforce investment activities (including community colleges);~~
 - ~~c) may include representatives of local educational agencies, and of community-based organizations with demonstrated experience and expertise in addressing the education or training needs of individuals with barriers to employment;~~~~

- ~~4) The Workforce Board shall include representatives of governmental and economic and community development entities serving the Central/Western Region, who:~~
- ~~a) shall include a representative of economic and community development entities;~~
 - ~~b) shall include an appropriate representative from the State employment service office under the Wagner Peyser Act (29 U.S.C. 49 et seq.) serving the Central/Western Region;~~
 - ~~c) shall include an appropriate representative of the programs carried out under title I of the Rehabilitation Act of 1973 (29 U.S.C. 720 et seq.), other than section 112 or part C of that title (29 U.S.C. 732, 741), serving the Central/Western Region;~~
 - ~~d) may include representatives of agencies or entities administering programs serving the Central/Western Region relating to transportation, housing, and public assistance; and~~
 - ~~e) may include representatives of philanthropic organizations serving the Central/Western Region; and~~
- (a) A majority of the members of the Local WDB must be representatives of business in the local area. At a minimum, two members must represent small business as defined by the U.S. Small Business Administration. Business representatives serving on Local WDBs also may serve on the State WDB. Each business representative must meet the following criteria:
- i. Be an owner, chief executive officer, chief operating officer, or other individual with optimum policy-making or hiring authority; and
 - ii. Provide employment opportunities in in-demand industry sectors or occupations, as those terms are defined in WIOA sec. 3(23).
- (b) At least 20 percent of the members of the Local WDB must be workforce representatives. These representatives:
- i. Must include two or more representatives of labor organizations, where such organizations exist in the local area. Where labor organizations do not exist, representatives must be selected from other employee representatives;
 - ii. Must include one or more representatives of a joint labor-management, or union affiliated, registered apprenticeship program within the area who must be a training director or a member of a labor organization. If no union affiliated registered apprenticeship programs exist in the area, a representative of a registered apprenticeship program with no union affiliation must be appointed, if one exists;
 - iii. May include one or more representatives of community-based organizations that have demonstrated experience and expertise in addressing the employment, training or education needs of individuals with barriers to employment, including organizations that serve veterans or provide or support competitive integrated employment for individuals with disabilities; and
 - iv. May include one or more representatives of organizations that have demonstrated experience and expertise in addressing the employment, training, or education needs of eligible youth, including representatives of organizations that serve out-of-school youth.

- (c) The Local WDB also must include:
- i. At least one eligible training provider administering adult education and literacy activities under WIOA title II;
 - ii. At least one representative from an institution of higher education providing workforce investment activities, including community colleges; and
 - iii. At least one representative from each of the following governmental and economic and community development entities:
 - Economic and community development entities;
 - The State Employment Service office under the Wagner-Peyser Act (29 U.S.C. 49 *et seq.*) serving the local area; and
 - The programs carried out under title I of the Rehabilitation Act of 1973, other than sec. 112 or part C of that title;
- (d) The membership of Local WDBs may include individuals or representatives of other appropriate entities in the local area, including:
- i. Entities administering education and training activities who represent local educational agencies or community-based organizations with demonstrated expertise in addressing the education or training needs for individuals with barriers to employment;
 - ii. Governmental and economic and community development entities who represent transportation, housing, and public assistance programs;
 - iii. Philanthropic organizations serving the local area; and
 - iv. Other appropriate individuals as determined by the chief elected official.
- (e) Members must be individuals with optimum policy-making authority within the entities they represent.
- (f) Chief elected officials must establish a formal nomination and appointment process, consistent with the criteria established by the Governor and State WDB under sec. 107(b)(1) of WIOA for appointment of members of the Local WDBs, that ensures:
- i. Business representatives are appointed from among individuals who are nominated by local business organizations and business trade associations;
 - ii. Labor representatives are appointed from among individuals who are nominated by local labor federations (or, for a local area in which no employees are represented by such organizations, other representatives of employees); and
 - iii. When there is more than one local area provider of adult education and literacy activities under title II, or multiple institutions of higher education providing workforce investment activities as described in WIOA sec. 107(b)(2)(C)(i) or (ii), nominations are solicited from those particular entities.
- (g) An individual may be appointed as a representative of more than one entity if the individual meets all the criteria for representation, including the criteria described in paragraphs (b) through (f) of this section, for each entity.
- (h) All required WDB members must have voting privilege. The chief elected official may convey

- (i) voting privileges to non-required members.
- (j) The Workforce Board may include such other individuals or representatives of entities as the CLEOs of the Central/Western Region may determine to be appropriate.
- (k) It shall be the aim of the CLEOs to appoint individuals to the Workforce Board who represent both the industrial and demographic composition of the Central/Western Region.
- (k) The workforce Board is responsible for electing a Chair and Vice Chair that must both be business representatives.

3.5 Officers of the Workforce Board. The Workforce Board shall elect from its serving membership the following officers:

(a) Chair. The Chair shall be elected by the members of the Workforce Board from among the current business representative Board members. The Chair shall preside at all meetings of the Workforce Board; shall appoint committees and their chair and vice-chair as needed, and shall perform all the duties incident to the Office of Chair, including:

- i. Assume a leadership role in creating a strategic vision and setting measurable goals and outcomes for a market-driven workforce development system and overseeing its progress;
- ii. Establish ad hoc committees when necessary for the purpose of furthering Board goals;
- iii. Solicit input and participation of the private sector for provision of services to the residents of the Central/Western Region;
- iv. Promote workforce development policies that improve the social and economic life of the community;
- v. Provide overall policy guidance and oversight on the use of funds and on the approach to delivery of services in the region; and
- vi. Serve as a voting member on the Workforce Board's Operations Committee and as a member of the ~~Board of Directors~~ CEO Board.

(b) Vice-Chair. There shall be a Vice-Chair elected by the members of the Workforce Board from among current business representative Board members. In the absence or disability of the Chair, the ~~senior~~ Vice-Chair ~~present~~ shall perform the duties of the Chair. Upon the complete disability of the Chair, the Vice-Chair will assume the duties of the Chair for the remainder of their existing term. It is normal progression for the Vice-Chair to take on the role of Chair for the following term.

(c) Treasurer. The Treasurer shall be responsible for overseeing the maintenance of all permanent financial records of the Board, the annual budget and all other financial

matters relating to the operation of the Board and shall work in carrying out the duties with both the staff of the Board, as well as the third party financial consultant contracted by the Board to provide financial management services. The Treasurer shall also be responsible for signing checks based upon policies established by the Board and the payment of the Board's financial obligations.

(d) Secretary. The Secretary shall be responsible for keeping the records and minutes of all the Board, to oversee maintenance of the records of all standing committee meetings, other records of the Board, and shall be assisted in carrying out those tasks by the members of the staff of the Board.

(e) Election/Officer Terms. The Chair, Vice-Chair, Treasurer and Secretary shall be elected at the annual meeting of the Workforce Board and shall serve for a period of one (1) year. Officers may succeed themselves, however, the Chair may serve for only three (3) consecutive terms. Except for the officers of Chairman and Vice-Chairman, one person may be elected to hold more than one office. A Board member may be elected to serve in more than one office. It is normal progression for the Vice-Chair to take on the role of Chair for the following term after the Chair steps down from their role.

(f) Resignation. The Chair, Vice-Chair, Treasurer and Secretary may resign their office by providing written notice to the CEOs or the CWMWI Executive Director.

(g) Annual Meeting. The Workforce Board Annual Meeting will be held at the January quarterly meeting each year, automatically. This will serve as the CWMWI Corporate Annual Meeting. The new schedule set in the preceding December will be re-ratified for all Boards; Elections will be held; and other business typical for an annual meeting.

(h) Elections for Workforce Board Officers. Elections for officers are automatically held each year at the Annual Meeting. Nominations should be submitted by candidates or others on behalf of candidates to the CEO and Executive Director. A proposed slate of officers will be prepared 60 days in advance of the annual meeting with the input of the Recruiting Committee, business members, and CEOs; Corporate officers of the CWMWI parallel Workforce Board officers; The Board of Directors of the CWMWI are the CEOs.

(i) Special Elections. If mid-year elections are necessary, the Chair at any time, or the Operations Committee, in a regular public meeting by majority vote, may schedule

an election. Nominations for a slate of appointed officers to serve if needed immediately, and which replaces the upcoming Annual Election, will be submitted to the CEO Chair.

(j) Member & Officer terms begin on February 1, each year. Members are required for at least one (1) year of each three (3) year term to serve as an officer or chair of a committee or be on a committee. Members can be granted exemptions by the CEO Chair.

(k) Board Member Reapplication Deadlines. Members reapply each year by November 30th. An electronic reminder will be sent to members via electronic mail by October 15th each year with instructions.

(l) Term limits. Members can serve up to three (3) terms or nine (9) years, including partial terms. Members may rotate off for one (1) consecutive term of three (3) years and then begin a new term limit capacity of up to (3) terms or nine (9) years again.

Article III END

~~(a) Except for the offices of Chairman and Vice Chairman, one person may be elected to hold more than one office.~~

ARTICLE IV: ORGANIZATION OF THE WORKFORCE DEVELOPMENT BOARD

4.1 Operations Committee. The Operations Committee shall be comprised of the Chair, the Vice-Chair, Treasurer, Secretary, Chairs of the Standing Committees and one (1) at-large member of the Workforce Board, annually elected by a majority vote of the Workforce Board. A member of the ~~CEO~~ Board shall also serve as a non-voting member of the Operations Committee to voice the opinions of all CEOs. The Executive Director shall serve as an ex-officio member of the Operations Committee. The Operations Committee shall coordinate the establishment and content of Workforce Board's agendas, proposals, and communications, as well as undertake such other supportive activities and functions as may be directed by the Workforce Board. The Operations Committee may exercise the powers of the full Workforce Board when timely action is necessary to ensure the best interest of the Workforce Board, CWMWI and their program and services. All Operations Committee actions shall be reported to the Workforce Board at its next meeting.

4.2 Standing Committees. The Workforce Board shall, as necessary, be organized

into the following standing committees to carry out its functions and responsibilities. The members of the committees shall be designated by the Workforce Board and may include members of the Workforce Board and such other individuals with appropriate experience and expertise as the Workforce Board determines may be necessary. Committee members that are not members of the Workforce Board shall have full voting rights within their appointed committee. The Chair of the Workforce Board shall appoint the chair of each standing committee. Committee appointments shall be for a one (1) year term.

(a) Recruitment Committee. ~~The Nominating Committee~~ this committee shall solicit nominations for membership in the Workforce Board from leaders of businesses, labor organizations, and education providers serving the Central/Western Region, and shall provide such nominations and sufficient information to evaluate each nominated individual to the CLEOs for appointment under Section 4.1 above. The ~~Nominating Recruitment~~ Committee shall also assist the CLEOs as necessary to coordinate appointment of Workforce Board members representing those government agencies and economic development entities required by WIOA Section 107(b).

(b) Youth Committee. The Youth Committee shall be responsible for developing and overseeing all youth activities contemplated in the Local Plan and undertaken by the Workforce Board and CWMWI. The Youth Committee shall be chaired by a member of the Workforce Board representing the business community serving the Central/Western Region. Resources Committee. The Resource Committee shall be responsible for oversight of the work of the sector sub-committees which shall be established from time to time for support of the work of the Workforce Board and of the Strategic Planning process.

(c) Additional Committees. The Workforce Board may appoint additional *ad hoc* committees as it may find useful to fulfill its purpose and obligations from time to time. The members of any *ad hoc* committees shall be designated by the Workforce Board and may include members of the Workforce Board and such other individuals with appropriate experience and expertise as the Workforce Board determines may be necessary. Committee members that are not members of the Workforce Board may be granted full voting rights within their appointed committee by a majority vote of the Workforce Board.

4.3 Committee Authority. Except as for the powers granted to the Executive Committee above, no standing or *ad hoc* committee shall have independent authority to commit the Workforce Board to any policy or action without a majority vote of the Workforce Board. A committee may adopt recommendation to the Workforce Board by a majority vote of the members in attendance after a quorum has been established.

ARTICLE V: MEETINGS OF THE WORKFORCE BOARD

5.1 Regular Meetings. The Workforce Board shall meet in person or through virtual video and/or audio technology at least once each quarter. The date, time, other meeting information, and location for the entire annual meeting schedule of the Workforce Board will be set in the December of the preceding year via electronic mail or software scheduling program.~~of each meeting will be determined at a prior meeting.~~

5.2 ~~—~~Meeting Announcement. ~~The full annual schedule with meeting dates, times and other information will be posted online as required by WIOA prior to January 1, and a written email will be sent to all Workforce Board Members. Working agendas and other meeting information will be emailed seven (7) days prior or as determined by the Workforce Board. Other requirements, such as calendar invitations, may apply. Once the meeting date, time and location have been established, a written announcement will be emailed to all Workforce Board Members at least ten~~

~~(10) days prior to the date of the meeting. A notice stating the date, time and location of the meeting will be posted in the local newspaper at least three (3) days prior to the date of the meeting.~~

5.45.2 Call to Special Meeting. All Workforce Board members shall receive notice of any special meeting at least five (5) days prior to the date of the meeting. A Notice stating the date, time and place of the meeting will be posted ~~in the local newspaper on the Workforce Board website~~ three (3) days prior to the date of the meeting.

5.55.3 Agenda. The Chair, working in conjunction with the Executive Director and the staff shall prepare an Agenda for each regular or special meeting of the Workforce ~~Development~~ Board.

5.65.4 Voting. Each member of the Workforce Board shall be entitled to one vote, except those members designated as ex-officio. All matters brought before the Workforce Board shall be decided by a majority vote of sufficient present members.

5.75.5 Quorum. A simple majority of the total serving members of the Workforce Board shall constitute a quorum for the transaction of the business at all meetings.

5.85.6 Attendance. A member who misses three consecutive regular meetings shall be presumed to have resigned. The CLEOs shall be notified by the Recruitment Committee Chair to request a new appointment. The member may request reappointment to

the Workforce Board at the discretion of the CLEOs.

58 Order of Business. The Chair shall be responsible for the orderly business of the Workforce Board and for calling items of the agenda. During the course of considering items on the agenda, only members of the Workforce Board shall participate in the discussion except by prior arrangement with the Chair, upon request of a member of the Workforce Board, or during a public participation period.

5.9 Rules. All procedures of the Workforce Board not set forth in these Bylaws shall be governed by the rules set forth in the current edition of Robert's Rules of Order unless the Workforce Board, by resolution, otherwise determines.

5.10 Open Meetings. All meetings of the Workforce Board shall be open and accessible to the general public, and minutes shall be maintained and electronically transmitted, posted on the Workforce Board website on-line or mailed to members within seven (7) calendar days of the next scheduled meeting.

ARTICLE VI. POLICIES.

The Workforce Board shall adopt and maintain such operating and program policies that are determined to be necessary and appropriate to carry out from time to time its responsibilities under WIOA and other applicable federal and sState laws. Program policies will be reviewed not less than twice a year by the Policy Review Committee. This committee will be comprised of local area, direct service experts who manage regional staff. Operating policies will be reviewed not less than once a year by the Operations Committee. All operating and program policies reviewed will be presented to the Workforce Board for final discussion and approval.

ARTICLE VII: CONFLICTS OF INTEREST

7.1 Conflict of Interest Policy. CWMWI, its staff and ~~Board of Directors~~CEOs, as well as the members of the Workforce Board are bound by the Conflict ~~of~~ Interest Policy, Local Policy# 2020-1, promulgated by CWMWI and adopted by the Workforce Board, the CLEOs and CWMWI on January 28, 2020, as it may be amended from time to time. Violation of the Conflict of Interest Policy shall be grounds for termination of membership in the Board of Directors, and the Workforce Board.

ARTICLE VIII: MISCELLANEOUS

8.1 Insurance. CWMWI is authorized to, and shall, obtain liability insurance coverage for all directors, officers and staff.

8.2 Amendment. Amendments to these Bylaws may only be approved by an affirmative majority vote of the Workforce Board members at any regular meeting of the Workforce Board, and a concurring affirmative majority vote of the ~~C~~E~~O~~s; provided however, that the amendments proposed had been submitted in writing at the previous regular meeting or included in the call to the meeting. Amendments proposed to these Bylaws must be received by the Workforce Board membership not less than seventy-two (72) hours prior to their consideration by the Workforce Board.

8.3 Severability. If any part of these bylaws are held to be invalid by a court of competent jurisdiction, the validity of the remaining portion of the bylaws shall not be affected.

Dated: January 20, 2021

Reviewed: February 9, 2022

Central Western Maine Workforce Development Board (CWMWDB) General Policies and Procedures	
Policy: Individual Training Accounts	EFFECTIVE DATE: 10/25/18 <i>Review Date: 10/25/20</i>
Approved by: CWMWDB	

Background

Under the Workforce Innovation and Opportunity Act (WIOA), Title 1, Sec. 134 (c) (3) (F) (iii) training services for adults and dislocated workers may be provided through Individual Training Accounts (ITAs). Under Sec. 129 (C) (2) (D) youth training activities are not subject to the policy governing the issuance and management of ITAs. However, under 20 CFR Sec. 681.550, ITAs may be allowed for out of school youth aged 16-24.

The intent of the WIOA is to allow individuals to take an active role in managing their employment future through the use of ITAs. Adults and dislocated workers receiving training under this approach will receive information they need (i.e., skills assessment, labor market conditions and trends, training vendor performance) to make a well-informed choice about their own employment future and the training to support their decision.

The ITA is established on behalf of a registrant. An Individual Service Strategy (ISS) does not constitute an “obligation” of the ITA. WIOA Title 1 adults and dislocated workers in consultation with CareerCenter Staff use the ITA to purchase training services from eligible training providers. Payments from ITAs may be made in a variety of ways, including the electronic transfer of funds through financial institutions, vouchers, or other appropriate methods. Payments may also be made incrementally, through payment of a portion of the costs at different points in the training course.

WIOA regulations allow the Local Workforce Development Board (LWDB) to impose limits on the dollar amount and/or the duration for ITAs.

There may be a limit for an individual participant that is based on the needs identified in the training plan; or

There may be a policy decision by the LWDB to establish a range of amounts and/or a maximum amount applicable to all ITAs.

Limitations established by LWDB policies must not undermine but maximize customer choice in the selection of an eligible training provider. ITA limitations may provide for exceptions to the limitations in individual cases.

This policy also clarifies the process and procedures that customers can expect to experience when the choice to seek skills training through WIOA is made.

Policy

Individuals may use ITAs in exchange for training services for skills in demand occupations within the identified industry clusters as defined by the LWDB from training providers on the approved list of eligible training providers (Sections 134 (B) (v) (I) (II). WIOA mandates that all training services (except for on-the-job training, customized training, and incumbent worker

training) be provided through the use of ITAs and that eligible individuals shall receive ITAs through the One-Stop Delivery System Sec. 134 (c) (3) (F) (iii).

1. Subcontracted service providers of the LWDB shall issue ITAs at the customer's request under the following conditions: Sec. 134 (c) (3) (A) (i)

- a. Funds are available,
- b. The customer chooses an eligible training provider consistent with the [Eligible Training Provider List \(ETPL\)](#),
- c. The customer is eligible for Training services,
- d. The customer is unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment and in need of training to obtain economic self-sufficiency and comparable or higher wages,
- e. The customer has the skills and qualifications to successfully participate in the selected program of training,
- f. The customer demonstrates appropriate career choices based on work experience and occupational preferences. -There is a reasonable expectation of completing training and a reasonable expectation of obtaining employment,
- g. ITAs are granted in high-growth employment sectors within the designated industry clusters as determined and documented in the Local Area Plan.

I. General:

1. Individual Training Accounts (ITAs) are established on behalf of an eligible individual to finance training services (§680.230 (4)).
2. WIOA Title 14 adults and dislocated workers will select from the list of eligible training providers who best meet their needs in consultation with [the appropriate WIOA Title 1 staff/their case manager](#) (§680.340).
3. Training shall be directly linked to occupations within industry clusters that are in demand in the local area or in another area if the customer is willing to relocate. The LWDB's subcontracted service providers approve training services for occupations within industry clusters which have been determined to have a high potential for sustained demand or growth in the local area Sec. 134 (c) (3) (F) (v).
4. ITAs will be available through CareerCenters [Maine's One-Stop System] with the exceptions listed in paragraph VI of this section Sec. 134 (c) (3) (G) (ii).

II. Eligibility for Individual Training Accounts

1. WIOA funding for training is limited to eligible participants who:
 - a. Are unable to obtain grant assistance from other sources to pay the costs of their training Sec. 134 (a) (3) (A) (B) (i) (I)
 - b. Require assistance beyond that available under grant assistance from other sources to pay the costs of such training Sec. 134 (a) (3) (A) (B) (i) (I) (II)

III. Local Policy

1. Participants will receive assessment, counseling, and a basic and training plan prior to selecting a training program.
2. The following elements are mandated by both State and Local Area regulations before arranging for WIOA training services:
 - a. The training will be limited to skills relevant to [in demand occupations in identified industry clusters](#) as defined and listed in the Area III's Local Plan.
 - b. Participants will be informed of the demand occupations or skills and how exceptions to the list of locally recognized in-demand occupations will be handled. [The LWDB will](#)

~~be consulted when necessary should exceptions to the recognized in-demand occupations be significant sectors for ITAs.~~

c. The participant will have access to the list of eligible providers through the CareerCenter system. Note: BES will provide a published list of eligible training providers electronically; participants must be able to access WIOA training services from any eligible training provider on the State list.

~~d. ITAs may include cost of books and fees necessary for training to the extent documented in the Central Western Maine region.~~

~~d. ITAs may include fees for books, special fees levied by eligible providers, educational materials, clothing/footwear necessary for training to the extent documented in Area III's Local Area. (These items are now covered under supportive services.)~~

Commented [BF1]: Find and add verbiage on LWB approval for specific ITAs when not on ETPL.

IV. Payments of ITAs ~~(680.230):~~

1. Payments may be made in a variety of ways, including electronic transfer of funds through financial institutions, vouchers, or other appropriate methods.

2. The LWDB's subcontracted Service Providers will determine when payments will be made, incrementally or at different points in the training.

3. ~~The LWDB subcontracted service providers will not pay for a course that has been previously failed. Exceptions can be made for certain circumstances, with written approval from the LWDB Executive Director. Supportive service funding may be used for tutoring.~~

4. Other Mechanisms for Payment [Sec. 134 (a) (3) (G)(ii) (I – VI)]

Contracts for services may be used instead of ITAs when:

a. the services provided are on-the-job training (OJT) or customized training;

b. the LWDB determines that there are an insufficient number of eligible training providers in the local area to accomplish the purpose of the ITA in designated/identified industry clusters.

c. the LWDB determines that there is a training program of demonstrated effectiveness offered by a community-based or faith-based (CBO, FBO) or another private organization to service special participant populations that face multiple barriers to employment. The LWDB will develop criteria to be used in determining demonstrated effectiveness, particularly as it applies to the special participant population to be served. The criteria will normally include:

i. Financial performance of the organization;

ii. Demonstrated performance in the delivery of services for participant populations through such means as program completion rate; attainment of the skills, certificates, or degrees the program is designed to provide; placement after training in unsubsidized employment; retention in employment; and

iii. How the specific program related to the workforce investment needs.

V. Limitations on ITAs:

1. The LWDB may impose limitations on the dollar amount and/or duration based upon criteria established by the Board. [§680.340]

2. There may be a limit for an individual participant based on the participant's needs as identified in the training plan or the LWDB may establish a range of amounts and/or a maximum amount applicable to all ITAs [680.340]

~~3. School supplies and books are paid out of supportive services and are covered under that policy.~~

4. ITA financial limitations may vary depending on the federal funding source, the duration of the award and customer needs that will be addressed. Providing a program title has sufficient funds, and after Pell and scholarships have been applied, a maximum financial limit of up to \$9,000 per year has been established by the Local -Workforce Development

~~Board Area III Board~~; starting from the initial training enrollment date, contingent upon the availability of funding. In addition, payments for training will observe the following time frames: if a training facility operates on a semester or module schedule, the limit will be up to \$3,000 per semester/mod for a period of 3 semesters/mods per year. If a training facility operates single payment programs, such as truck driving or oil burner, a single payment may be made based on what the program title can afford up to \$9,000. Any exceptions to this financial limit or the time frames must have prior approval of the LWDB Executive Director. The objective will be to extend the resources available for these services by aggressively leveraging other resources of both WIOA partner programs and outside sources of financial aid.

5. When an individual selects training, other sources must be considered to supplement the use of WIOA funds to finance an ITA. The other sources may include the Competitive Skills Scholarship Program [CSSP], scholarships, Pell Grants, other grants, severance pay, individual financing, etc. [680.230]

6. ITAs may be written for credentials such as degrees, certificates, and occupational licenses. ITAs will be written for no longer than 2 years.- Any exception to the time limit must be reviewed ~~by the Career Center Manager~~ by the Service Provider and approved in writing by the Executive Director of the CWMWDB.

Commented [BF2]: No limit per wioa

VI. ITAs for Youth ~~(\$681.550):~~

1. ITAs are not allowed for in-school youth (ISY) except for those individuals, age 18 and above, who are eligible for training services under the adult and dislocated worker programs. Unless the State receives an exception from USDOL.
2. ITAs are allowed for all out of school youth (OSY), ages 16 – 24.- If youth funds are used, the Eligible Training Provider List (ETPL) must be used.
3. To the extent possible, in order to enhance youth participant choice, youth participants ~~to~~ should be involved in the selection of educational and training activities.

VII. ~~Other Mechanisms for Payment [Sec. 134 (a) (3) (G)(ii) (I – VI)]~~

~~1. Contracts for services may be used instead of ITAs when:~~

- ~~a. the services provided are on-the-job training (OJT) or customized training;~~
- ~~b. the LWDB determines that there are an insufficient number of eligible training providers in the local area to accomplish the purpose of the ITA in designated/identified industry clusters.~~
- ~~c. the LWDB determines that there is a training program of demonstrated effectiveness offered by a community-based or faith-based (CBO, FBO) or another private organization to service special participant populations that face multiple barriers to employment. The LWDB will develop criteria to be used in determining demonstrated effectiveness, particularly as it applies to the special participant population to be served. The criteria will normally include:~~
 - ~~i. Financial performance of the organization;~~
 - ~~ii. Demonstrated performance in the delivery of services for participant populations through such means as program completion rate, attainment of the skills, certificates, or degrees the program is designed to provide; placement after training in unsubsidized employment; retention in employment; and~~
 - ~~iii. How the specific program related to the workforce investment needs.~~

Commented [BF3]: Moved up, under payments

VIII. Coordination of ITAs with other Grant Assistance

The WIOA limits funding for training to individuals who are unable to find other grant assistance for training or whose financial needs exceed the assistance available from other sources. WIOA funds are intended to supplement other sources of funding [680.230]. The LWDB will work with its Service Providers to establish policies to assure

that ~~Area III~~ the local area CareerCenters partners leverage and coordinate such WIOA resources as are available through the CSSP, scholarships, TAA, Pell, and etc. with WIOA funding. The Service Provider must ensure other partner resources are leveraged with WIOA Title 1 funds. Service Providers must assure that duplicate payments are not made to training providers for the cost of training and will coordinate available funds to pay for training costs, ~~so that WIOA funds supplement other sources of funds to pay for training and avoid duplication of payments.~~ Financial resources ~~The exact mix of funds~~ shall be determined on the availability of funding for either training costs or support services with the goal of planning for the completion of the training program that the customer participant has accepted.

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CENTRAL WESTERN MAINE WORKFORCE DEVELOPMENT BOARD
POLICIES AND PROCEDURES

Policy Number:	2019-7
Subject of Policy:	WIOA & DWG Supportive Services <u>Policy</u>
WIOA Citation:	WIOA Section 134 (d) (2) (H) and WIOA Regulations at 20 CFR Part 680.900 and 680.910]
Prior Policy:	This same policy before amendment
Action:	This is an amendment and update.
Effective Date:	October 1, 2019; <u>TBD</u>
Review Date:	<u>February 10, 2022; October TBD, 2022</u>

1. Background:

Supportive services are allowed for youth, adults and dislocated workers are defined in the Workforce Innovation and Opportunity Act, WIOA, enacted January 3, 2014 sec. 134 (3) (c) (2) (ix) (1) and sec. 129 (c) (2) (G). They include transportation, child-care, health care and medical services, general clothing, relocation assistance, and other support payments. WIOA and ~~NEG-NDWG~~ Service Providers are required to adhere to all policies and guidelines set forth below.

2. General Supportive Service Policy Guidelines for Formula WIOA Programs (Adult, Dislocated Worker and Youth)

- A.** The provision of accurate information on the availability of Supportive Services and the referral process through the subcontracted Service Provider~~CareerCenter~~ must be made available to adults and dislocated workers. [WIOA Section 134 (d) (2) (H) and WIOA Regulations at 20 CFR Part 680.900 and 680.910].
- B.** Supportive Services are services such as transportation, childcare, dependent care, housing, and other related payments based upon the necessity to complete employment, education, and training goals established in the participant's Individual Service Strategy (ISS), availability of funds, and are for expenses that are not available from other available sources (such as General Assistance (GA) or the Department of Health and Human Services (DHHS). Supportive Services are those deemed necessary to enable an individual to participate in activities authorized under WIOA Title I ~~includes during follow-up~~. Supportive Services are under no circumstances the same as Needs-Related Payments [NRPs] and may not be considered or coded as such. A separate Needs-Related Payments Payment Policy governs NRPs and may be considered by the LWDB if implementation becomes necessary.
- C.** Supportive services may be in-kind aid, cash assistance, or services payable through arrangements with other agencies. Except under emergency/exceptional circumstances (with documented approval of the Case manager's supervision), Supportive Services are provided directly to an organization/entity which has issued a dated invoice/bill/statement filed together with all supporting documentation and record of payment in both the customer's physical file~~electronic record~~ and noted as part of the customer's case notes recorded in the Maine Job Link (MJL) operating system.
- D.** Under WIOA Supportive Services may only be provided to adults and dislocated worker participants who are:
 - a. Participating in individualized career services or training services, and

- b. Unable to obtain support services through other programs providing such services. [WIOA Section 134 (B) (2) (A) and (B)]
- E. Under WIOA Supportive Services may not be provided to adults and dislocated worker participants who have completed individualized career or training services and have exited the program. WIOA sec. 134 (d) (2).
- F. ~~When more than one supportive service need exists for a participant,~~ WIOA program providers are only to pay for the least expensive appropriate supportive service option provided that is accessible to the participant, unless provided with justification for a specific provider.
- G. The participant's family income that falls below the Lower Living Standard Income Level (LLSIL) guidelines will be given priority to receive supportive services. ~~Although National~~ Although National Dislocated Worker Grants (NDWG) ~~(NEGs)~~ and Workforce Investment Act (WIOA) Dislocated Worker programs are exempt from the LLSIL requirement, approval of supportive services is not based on entitlement but rather the services that are reasonable and necessary for the participant to complete her/his reemployment and/or retraining goals.
- The Central ~~Western~~ Maine Workforce Development Board [CWMWDB] has developed ~~with its Regional Managers' Team~~ guidelines for the use of Supportive Services by its subcontracted service providers in Area III. Amounts (and categories) listed in Appendix A are subject to change upon agreement between ~~Area III Regional Managers and the LWDB as a result of an annual review~~ the program policy review committee and approved by the LWDB.
- H. Any exception to ~~the upper limit of these amounts or to covering expenses past two years~~ this policy must be reviewed by the ~~CareerCenter Manager~~ Service Provider and approved in writing by the Executive Director of the CWMWDB. Other financial aid that customers are able to secure such as a Pell Grant or other grants will be a factor in determining the amount provided from WIOA funds for Supportive Services. WIOA Supportive Services will be the resource of last resort in reviewing resources for financial support.
- I. The ~~CareerCenter Manager~~ Service Provider reviews and approves use of any and all Supportive Services funds by Staff members on a case-by-case basis, and will provide a signed (or direct e-mail signature) and dated indication of her/his approval, indicating (1) the specific circumstances for providing the support service payment, (2) the specific products and/or services under consideration, and (3) rationale for the provision and amount of any payment determined necessary for continued participation in the participant's training and employment program.
- J. The ~~Manager's Service Provider's~~ approval and authorization with Staff member's case notes providing rationale and documentation for the approval will be ~~uploaded~~ inserted in the participant's ~~physical/paper file(s)~~ electronic file and reference to it will be made in the case notes recorded in the Maine Job Link (MJL) operating system.
- K. The CWMWDB ~~in consultation with Area III CareerCenter Managers~~ has determined that all Supportive Services, ~~excluding books,~~ may not exceed \$3,000.00 per participant per year starting at the date of the first supportive service(s) with a limit of two successive years. ~~Books, by themselves, may not exceed \$2,000.00 per year starting at the date of the first supportive service (s) with a limit of two successive years.~~
- L. ~~12.~~ The Supportive Service Policy for Formula WIOA Programs will apply to National Dislocated Worker Grants and other specialized grants funded by the USDOL.
- M. ~~13.~~ WIOA Title I funds must not be spent on other adult, dislocated worker or youth services, including supportive services, for incumbent or employed worker unless they also meet the eligibility criteria for those services. [WIOA section 680.780 and 680.790]

3. Youth Services

A. For each youth participant, Service Providers will

- i. Follow the Policy for Supportive Services as outlined above. Youth follow-up services are critical services provided following a youth's exit from a program to help ensure the youth is successful in employment and/or postsecondary education and training (20 CFR §681.580);
- ii. Provide an objective assessment including a review of academic and occupational skill levels, as well as the service needs of the youth, including Supportive Service needs;
- iii. Develop an Employment or Training plan including identifying age-appropriate career goals and assessment results;
- iv. Provide preparation for post-secondary educational opportunities, linkages between academic and occupational learning, preparation for employment, and effective connections to intermediary organizations that provide strong links to the job market and employers. [WIOA Section 129 (c) (1) (A) (B) (C)]; and
- v. Youth follow-up services may include the following program elements:
 - (1) support services;
 - (2) adult mentoring;
 - (3) financial literacy education;
 - (4) 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
 - (5) activities that help youth prepare for and transition to postsecondary education and training.

4. Specific Supportive Service Guidelines

A. Transportation:

- i. Service providers may use mileage reimbursement (signed travel sheets) or gas cards to support travel to training, existing employment, and/or specific job prospects (interview, testing, orientation, job shadowing, etc.). Provider policies on formula for issuance of gas cards or reimbursement shall be evident and participant receipt(s) shall be clearly documented in case files.
- ii. Bus tickets/ferry tickets are allowable transportation costs.
- iii. Driver's License/Education (Class C) not to exceed \$750.00.
- ~~iv.~~ Vehicle repairs only for required correction of State Safety deficiencies as required for State Inspection and/or ability to operate the vehicle (i.e., failure of State inspection) are allowed. If tires are needed to pass inspection, only all-season tires will be allowed. At a minimum, one written itemized quote must be on file. The Service Provider may ask for a second quote when there is any question on cost of service. Quotes for written estimates must have an authorized mechanics sign off. Itemized written estimates (at least two) must be documented in the file. Expenses may not exceed \$1,000.00 as an allowable amount for supportive services. ~~Quotes for written estimates must have an authorized mechanics sign off. Registration and proof of insurance must be with the primary customer, a valid driver's license is also required. Note: this policy may cover costs even if the primary customer is unable to drive but has retained a "driver" for the vehicle to be used for the purposes enumerated above.~~
- ~~v.~~ Notes: Vehicle repairs will only be provided to the primary mode of transportation during the training period. Note: This policy may cover costs even if the primary customer is unable to drive but has retained a "driver" for the vehicle to be used for the purposes enumerated above.
- ~~iv.vi.~~ Registration: Reimbursement to participants is allowed for car registration if the participant provides proof of payment to the WDS staff. Documented proof must be uploaded into the

participant file in MJL for reimbursement. Registration reimbursement can be provided one-time per participant for up to \$300.

B. Childcare:

Supportive Service payments for WIOA participants will be based on current DHHS guidelines. Due to the rural nature of the local area, supportive service payments can be made to a licensed and/or license-exempt childcare provider (as identified in the current DHHS guidelines). This includes a family member who is a licensed childcare provider operating a business with approval of the LWDB Executive Director. Generally childcare payments will not be made where a member of the customer's household is available to provide the childcare during the hours the customer is engaged in training. Exception: there will be no supportive service payments made to family members for childcare (unless a family member is a licensed childcare provider operating a business and there is prior approval from the CWMWDB.) Under the circumstances of vacation and time-off, payments will still qualify.

C. Clothing/Uniforms:

Such items may be covered under support services when they have not been included as part of a training plan. Such items may not exceed ~~\$250~~ \$350 and will be documented as a need related to training or employment.

D. Safety Equipment:

Such equipment may be covered if it is required by an employer or training and meets established safety standards in order to obtain and retain employment. Examples include PPE, steel-toed boots, safety glasses, helmet, safety gloves, etc. Staff must only approve the lowest bid/costs which may not exceed ~~\$250.00~~ \$500. Staff shall refer to the authorized Service Provider vendor list, and document in MJL that they checked various prices with different vendors, as applicable to the request.- There is a general acknowledgement that there may be lack of product availability due to supply chain issues and/or the participant proximity becomes pertinent to pay more money due to participant access (when the participant has limited transportation to acquire goods). If employers, as part of the normal course of hiring usually supply the safety equipment, then the equipment will not be purchased for the participant as she/he should be treated the same as other new hires.

E. Tools:

Supportive service payments for tools are capped at \$1,000. If the tools are required by the employer to successfully obtain employment, a valid job offer from the employer must be verified prior to purchase. If employers, as part of the normal course of hiring usually supply the ~~safety equipment~~ tools—do you mean “tools”, then the equipment will not be purchased for the participant as she/he should be treated the same as other new hires. If tools are purchased for training, they must be required as part of the curriculum. If the training is not completed, the tools must be returned to the service provider.

F. Medical/Optical/Dental:

- i. Medical supportive services must be a requirement of a training course, employment- related or required for admission into training. Written documentation from a medical professional stating that an eye/hearing exam, glasses/hearing aid, dental work^{*,} or medical equipment is necessary for participation in training and/or employment will be sufficient proof of the need for these services. Documents shall be recorded in case notes and/or the ISS by Service Provider staff. No-cost clinics and General Assistance must be considered prior to expending funds on medical services. Support may include glasses, eye exams, physicals, inoculations, lab fees, drug testing, etc. Prescription drugs are NOT an allowable expense. Medical, dental, and optical services/equipment are limited to a maximum of ~~\$1200.~~ \$500.00. ~~Eye~~

~~exams/eyeglasses are limited to a combined maximum of \$250.00. Dental services and supplies are limited to a combined maximum of \$600.00.~~

- ii. Mental Health/Substance abuse treatments are not covered. Staff will make referrals to appropriate agencies.

G. Miscellaneous Emergency/Housing:

Emergency needs are items not previously covered under this policy. Documentation must be clear supporting the need and establishing that the items or services are required to enable the participant to continue her/his activity in the program and/or to obtain or retain employment. Support items in this category shall not exceed \$1,500, which may include ~~up to \$900 in~~ Housing Assistance. This category may cover items such as short-term housing (for purposes of emergency/safety) or reconnecting electrical power, for examples. Supportive Services under this category are based upon the necessity to complete employment, education, and training goals established in the participant's Individual Service Strategy (ISS), availability of funds, and are for expenses that are not available from other sources (such as General Assistance (GA), the Department of Health and Human Services (DHHS), food pantries, etc. Insurance coverage costs are not to be covered; insurance may not be purchased as an "emergency" cost. Any requests in this category will be approved in writing at the Regional Management level of the service provider who will consult with the Executive ~~or Deputy Director~~ of the CWMWDB, who will also indicate approval in writing. Documentation of required approvals will then be filed in the participant's case file and referred to in case notes entered into the Maine Job Link (MJL) operating system.

H. Licensing and Testing:

Such items may be covered under support services and may include applications, tests, and certification exams. Such items may not exceed ~~\$250~~ 400 and will be documented as a need related to training or employment.

~~**I. Educational Testing:**~~

~~Such testing may include testing done by a school or CASAS/TABE testing and may not exceed \$250. It will be documented as a need related to training or employment.~~

~~**J. Drug Testing:**~~

~~Such testing is to be covered under support services per policy and may not exceed \$125.00~~

~~**K. Books for School:**~~

~~Books may not exceed \$2,000 per year and will be documented as a need related to training.~~

L.L. Fingerprinting and Criminal Background Checks

Such item may be covered under support services when it has not been included as part of a training plan. Such item may not exceed \$100 and will be documented as a need related to employment.

M.J. Computer and/or Software Purchase:

If a participant does not have reasonable access to a computer or software of sufficient capacity required for employment or training, then funds may be used to contribute up to \$600 for either the purchase of a new or refurbished computer, or to upgrade an old one, whichever is the least expensive method, or for required software to meet the employment or training need. The purchase, upgrade, or software must be a requirement for employment or training and documented in the participant's file. A computer or software will not be purchased, if the employer normally provides these items. A purchase, upgrade, or software will be provided one time only. Damaged, lost, or stolen computers or software will not be replaced. \$600 maximum for a computer or software or a combination of the two, but not \$600 for each.

K. Internet Access:

Internet bills do qualify for a maximum of \$50 per month, for only the months when the participant is enrolled in a full-time (as consistent with the institution) remote learning, for a maximum of \$600/12 months. Special equipment for internet access shall be covered by the section "computer/software purchase".

L. ~~School Materials and Fees:~~

Fees* and supplies that are required for students enrolled in approved postsecondary occupational training and/or education. Such items may not exceed \$500. Required supplies must be listed as part of the course syllabus, school policy, or in a letter from the instructor, or supplies such as a backpack, notebooks, pencils, highlighters, etc., that may present a hardship for participants. Any school supplies that are not a requirement of the course such as notebooks, pens/pencils, highlighters, calculators, etc., will not be covered and are the responsibility of the student.

M. ~~ITA policy:~~

Fees included as part of the tuition bill, may be paid as part of training costs and subject to the ITA policy.

Appendix A

Supportive Services Guidelines

Supportive Services are based upon necessity and availability of funds and are for expenses that are not covered by insurance or another agency or grant. Supporting documentation paperwork is necessary to be filed in the participant's file; at least two price estimates must be collected whenever possible, or WDS staff must indicate in MJL case notes why two or more quotes were not attained. Supportive Services amounts include the following maximum expense for each supportive service per enrolled client per year, starting at the date of the first supportive service(s) provided. Supportive Services, excluding books, are limited to \$3,000 per participant per year, starting at the date of the first supportive service(s) provided with a limit of two successive years. ~~Books may not exceed \$2,000.00 per year starting at the date of the first supportive service (s) with a limit of two successive years~~

Allowable Maximum for Supportive Services

Medical: services/equipment	\$500.00
Dental: services and supplies	\$600.00
Housing (see "Miscellaneous Emergency,")	\$900
A. Transportation: vehicle repairs	\$1,500.00
Transportation: mileage reimbursement	Prevailing State rate
Driver's Education (Class C license)	\$750.00
Transportation: liability insurance <u>registration</u>	\$300.00
Basic Needs: grooming, and food	\$200.00
B. Childcare	use current DHHS guidelines
C. Clothing/Uniforms	\$3250.00
<u>D. Safety Equipment</u>	<u>\$500.00</u>
E. Tools	\$1,000.00
F. Medical/Dental/Optical: services/equipment and supplies	\$251200.00
G. Miscellaneous Emergency/Housing	\$15900.00
H. Licensing and Testing	\$40250.00
I. Fingerprinting and Criminal Background Checks	\$100.00
Educational Testing	\$250.00
Drug Testing Per Policy	\$125.00
School Materials and Fees	\$500.00
Books for School	\$2,000.00/year
<u>J. Computer and/or Software</u>	<u>\$600.00</u>
<u>K. Internet Reimbursement</u>	<u>\$50/month; \$600/12 months</u>
L. School Materials	\$500.00

Emergency requests will be reviewed and may be granted written approval by the Executive Director of the CWMWDB, [visit cwmwdb.org](http://visit.cwmwdb.org).

CWMWDB Policy Adoption on 9/25/2019 with an effective date of 10/1/2019. This policy will be re-reviewed by 10/1/2021.

Central Western Maine Workforce Development Board (CWMWDB) General Policies and Procedures	
Policy: On-the-Job-Training	EFFECTIVE DATE: 6/26/19 <i>Review Date: 4/20/2022-2019</i>
Approved by: CWMWDB	

I. General Information

The following policies and procedures will govern the application of On-the-Job Training (OJT) options for WIOA Title I eligible adult, dislocated worker, and youth customers. They are based on the Workforce Innovation and Opportunity Act Sec. 134 (c) (3) (A – D) (H), and 20 CFR D. Part 680, 7. Subpart F, 680.700 – 680.740.

On-the-Job Training activities support the development of the comprehensive workforce investment system under WIOA and Maine’s workforce development vision, by providing additional training options for both employer and employee. Training provided must be in accordance with WIOA Subtitle E – Administration, Sec. 181 Requirements and Restrictions, Sec. 188 Nondiscrimination, and Sec. 194 General Program Requirements.

II. Definition

The term “on-the-job training” means training by an employer that is provided to a paid participant while engaged in productive work in a job that that

- a. provides knowledge or skills essential to the full and adequate performance of the job;
- b. is made available through a program that provides reimbursement to the employer of up to 50% of the wage rate of the participant...
- c. is limited in duration as appropriate to the occupation... Sec. 3 Definitions (44)

III. Participant Screening –criteria trainee needs to meet:

- Person is not already skilled in the occupation for which ~~s/he~~they would be trained
- ~~S/he~~They must be eligible for one of the WIOA Title 1B CareerCenter-training programs
- An assessment will be completed. Assessment may be either an intensive interview or a CIP, WIP, CASAS, (and CAPS if requested by employer) will be conducted. Results should meet employer expectations
- Person must be appropriate for the training and be able to complete the training
- A training plan needs to list OJT and document the need for training
- ~~The contract will be reviewed with the trainee and they will sign on the training outline page and receive a copy~~
- SP CareerCenter-staff must stay in contact with the participant at a minimum of once a month throughout the OJT

IV. Employer Criteria:

- Positions must be full-time based on employer’s definition of full-time but never less than 30 hours
- Part-time positions are only permissible if there is documentation that the trainee has conditions limiting them to part-time work such as a disability or health
- No OJT will be written for seasonal or temporary positions
- It is not permissible to do OJT with temp agencies for Temp-to-Hire positions

- Employer has not relocated causing the loss of jobs, or it has been more than 120 days since the relocation
- There must be a formal payroll system where employee hours are tracked and standard deductions taken for IRS, social security, etc.
- Training does not impair existing contracts for services or collective bargaining agreements
- Training does not involve working on those parts of sites used for sectarian activities or religious worship
- Preference given to an employer whose positions fall under the LWDB sectors, but not mandatory
- Employer has not exhibited a pattern of failure (not fired or laid off trainees upon completion of OJT)
- ~~Wages must meet the state or local municipality's minimum wage (whichever is higher). Preference will be given to employers who pay higher or will provide an increase within 6 months of the start date.~~
- No OJTs will be written at minimum wage and preference will be given to businesses that pay at or above 125% of the current state minimum wage rate. If a business' starting wage falls under 125% of minimum, considerations such as job seeker challenges, available jobs within the immediate geographic area, and customer choice will be reviewed. In addition, those businesses must offer at least one of the following:
 - Wage progression resulting in an increase by end of 1st year
 - Sign on bonus of \$1000 or more
 - Benefits Package
 - Training that results in transferable skills
 - Opportunity for advancement
- ~~Wages may start at less than the customary starting wage (but never below minimum), if it is an earn-while-you-learn situation where the person is working toward a license or certificate, wages may start at less than the customary starting wage (but never below minimum);~~ however, once the trainee receives the license or certificate, ~~she/they~~ must receive the same wages as other workers who are already licensed or certified. Preference will be given to employers who will provide an increase within 6 months of the start date. Under earn-while-you-learn, the trainees are hired in a different capacity (trainee position) than those that are already certified, so it is permissible to pay them a different wage for that period of time.
- OJT is a hire first program so all OJT participants need to be paid the same as other people in the same position. We cannot pay them less under OJT, even though it's training. The incentive we can offer employers to hire people with significant barriers, is to reimburse them 75% of the wages instead of 50%. We could also offer to do work experience for a period of time in place of or ahead of OJT.
- Preference will be given to an employer that offers benefits, but it is not a mandate
- ~~There is no pattern of discrimination against protected legal classes~~ All participants are protected from discrimination under the Equal Employment Opportunity Commission federal laws, and are designed to safeguard participants from discrimination on the basis of race, color, religion, sex (including pregnancy, gender identity, and sexual orientation), parental status, national origin, age, disability, genetic information, political affiliation, military service, or other non-merit based factors.
- No current employee will be laid off or displaced to accommodate an OJT trainee
- Trainees must be retained for 26 weeks after completion of OJT (unless there are circumstances that warrant otherwise)

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- Employer certifies that no member of the OJT trainee's immediate family is engaged in an administrative capacity for the employer or will directly supervise the OJT trainee. For the purpose of this contract, immediate family is defined as spouse, children, parents, grandparents, grandchildren, brothers, sisters or person bearing the same relationship to the OJT trainee's spouse.
- Trainees must be "regular" employees and not contracted employees
- Trainees receive the same benefits and working conditions as all other employees
- Employees must be covered by Worker's Compensation
- Supervision must be provided and progress on training components must be tracked
- Employer agrees to periodic visits by ~~CareerCenter-Service Provider staff~~ and to do monthly invoices
- Employer agrees to inform ~~CareerCenter-the Service Provider~~ and trainee of any problems and to work out a correction plan, if appropriate

V. Contract Variables that must be met:

- Conduct a pre-OJT review to make sure that employer criteria will be met, especially for new companies. Employer screening items listed above may serve as the pre-OJT review
- Employer must sign the contract prior to the trainee beginning work
- We will reimburse up to 50% of actual hours worked; classroom training, seminars, etc., for which the employer pays wages and considers part of training will be considered hours worked; we will not reimburse for holidays, vacations, sick time, when training does not occur. We will not reimburse 50% of "non-regular" wages such as overtime pay, shift differential, premium pay, etc. We can pay 50% of the regular wages for overtime hours, if training occurs during those hours, but we cannot reimburse at the time and a half rate
- Reimbursement of up to 75% must be reviewed with the supervisor who will determine if it should be sent to the ~~LWDB-Executive Director~~Director of Workforce Services for a waiver. Factors such as size of employer, characteristics of participant, quality of training, and advancement opportunities need to be explained in the waiver request. The 75% reimbursement will be considered as an incentive for employers to hire customers with significant barriers to employment.
- Length of contract will be determined by SVP code of the occupation. Contracts for SVP codes of 4 or under will not exceed 12 weeks (max of 480 hours) with the average being 8 – 10 weeks (max of 320 – 400 hours). Contracts for SVP codes of 5 and above will not exceed 26 weeks (max of 1040 hours) with the average being 12 – 16 weeks (max of 480 – 640 hours).
- Wage increase at end of training will be the preference.
- Additional costs may be covered if they are necessary for the occupation, required by the employer, and necessary in order to maintain employment
- Skills training outline will be developed by/with the employer based on the number of hours
- Tracking training progress will be done by reviewing the ~~training outline each month when the invoice is signed~~evaluations during the contract period
- We will certify that skill training was completed by having the supervisor or HR sign-off on the training outline
- All OJTs are contingent upon the availability of funding
- Combining OJT with apprenticeship is permissible and will be considered on an individual basis

VI. Employed Worker* OJTs:

OJTs for employed workers will be handled the same as above except the following conditions must be met:

- Trainee is not already earning a self-sufficient wage, of at least 125% of the state minimum wage, or wages comparable to ~~or~~ higher than wages from previous employment, as determined by LWDB policy,
- Training must result in an increase in wages to meet or exceed 125% of the state minimum wage, or nor less than \$0.50 increase, and/or increase in hours (unless already working full-time),
- The job training provider will be able to backfill the vacancy created as a result of the employed worker moving up (if a vacancy is created)
- Training is necessary for the introduction of new technology, production, or service process, upgrades to a new job that requires additional skills, workplace literacy, or other appropriate purposes identified by LWDB policy.

Under the WIOA act an employed worker is someone who is working but still meets the title I WIOA eligibility guidelines, Section 680.780 WIOA Federal Register.

VIII. Employer Payments:

OJT payments to employers are deemed to be compensation for the extraordinary costs associated with employees-in-training, additional supervision related to the training, and the costs associated with lower productivity of the trainees.

Employers may be reimbursed up to 50% of the wage rate of an OJT trainee for the extraordinary costs. Reimbursement of 75% will only be made with LWDB approval.

Employers are not required to document such extraordinary costs.

Funds provided to employers for OJT must not be used to directly or indirectly assist, promote, or deter union organizing.

XI. Staff Expectations:

- ~~Receive training on policy, employer/participant screening, contract preparation/maintenance/closure, contract modification~~
- ~~Recruit new employers for OJT as appropriate~~
- ~~Complete monthly invoices, get signatures, distribute copies~~
- ~~Monitor sites and contact trainee to track and document participant progress~~
- ~~Get signature from employer and trainee on OJT training outline page signifying that training was completed~~

Direct Inquiries:

**Executive Director
Central/Western Maine WDB
5 Mollison Way Lewiston, ME 04240
207-753-9011**

Central/Western Maine Workforce Investment Board
Policy & Procedures Governing the Use of Customized Training

CENTRAL WESTERN MAINE WORKFORCE DEVELOPMENT BOARD
POLICIES AND PROCEDURES

POLICY	#2013-06 Customized Training Policy
AUTHORITY	WIOA sec 101(8), 20 CFR § 652, 20 CFR § 663.700-730
EFFECTIVE DATE	06/2013; 02/2015
REVISION DATE(S)	02/2015; 04/20/2022; 10/01/2022
APPLIES TO	WIOA Title IB Youth Program and Staff

General Information:

The following policies and procedures will govern the application of Customized Training options with employers, ~~WIA~~WIOA Title I eligible customers and incumbent workers. They are based on guidance from the Maine Department of Labor, Bureau of Employment Services (~~MDOL~~ BES) and the Workforce ~~Investment Innovation and Opportunity~~ Act (~~WIA~~WIOA sec 101 (8)) and ~~WIA~~ 20 CFR Part 652, Subpart G, 663.700-~~to~~ 663-715. They are also based on ~~WIA~~WIOA section 101(8) and the accompanying regulations in 20 CFR ~~subpart g~~663.715, 663.720, and 663.730 establish that ~~local WIBSLWBs~~ and the ~~S~~state may offer customized training through an agreement with either a vendor or employer with a mandatory employer match requirement of 50% of the cost of training. In July, 2012, Maine received approval from the United States Department of Labor (USDOL) to replace the statutory employer match requirement of 50% for customized training, to a minimum of 10% with the variance based upon State and local policy.

Customized Training activities support the development of the comprehensive workforce investment system under ~~WIA~~WIOA and Maine's workforce development vision, by providing additional training options for both employer and employee customers. Customized Training is a means to work with employers to directly address skills shortages in the employers' workplaces.

Definition:

Customized training is training designed to meet the needs of a specific employer, or group of employers (employer consortiums). It can be provided for the introduction of new technologies, or to new production or service procedures, upgrading existing skills, workplace literacy, or other appropriate purposes identified by the ~~local WIBLWB~~. The employer must commit to employ, or continue to employ, the worker(s) upon successful completion of any form of customized training.

Customized training is one of several types of allowable training identified in Section 134(d)(4) of ~~WIA~~WIOA. This training may be offered to individuals under local area formula-funded programs or as a type of incumbent worker training, conducted at the local level under waiver authority.

Employee Guidelines:

Customized Training may be provided to both ~~WIA~~WIOA-eligible unemployed workers, employed workers, and incumbent workers. Employed workers may include full-time, part-time, and/or workers placed through private placement agencies. If workers are part-time, they must be offered full-time employment upon completion of training.

~~WIA~~WIOA-eligible unemployed and employed workers are enrolled in customized training as appropriate based on their individual employment plans. These participants must meet all eligibility requirements, and receive both a core and an intensive service prior to the start of customized training.

When serving incumbent workers through programs operated under waiver authority, local Area III will adhere to the same regulatory eligibility requirements as regular formula-funded program participant services.

Unless the trainee is unemployed, in order to participate in customized training, an "employer-employee" relationship must exist between the trainee and the business that is seeking local WIB approval to perform customized training. Individual workers who are independent contractors are not eligible to participate in customized training. Independent contractors fall under the category of self-employment.

Customized training of an eligible unemployed, employed, or incumbent worker may be provided when the employee is not meeting the self-sufficiency guidelines as determined by [LWIBLWB](#) policy. Self-sufficiency for an unemployed (dislocated) or employed (low income) worker will be based on the average earnings set by MDOL's performance goals for [WIAWIOA](#). Upon completion of any customized training, wages must meet the [LWIBLWB](#)-self-sufficiency guidelines, or be equal to those provided to regular employees who have worked a similar length of time and are doing the same type of work. Every effort will be made to secure the highest wage possible.

Training Guidelines:

Training can be provided for the introduction of new technologies, or for new production or service procedures, upgrading existing skills, workplace literacy, or other appropriate purposes identified by the [local WIBLWB](#).

All customized training must be within the [LWIBLWB](#) approved [clusters/industries and sectors of focus](#), or a waiver must be submitted by employer or employer group explaining why requested training would be appropriate. All waivers must be approved by the Executive Director of the [LWIBLWB](#).

Training must enable trainees to obtain industry or employer-recognized credentials/certificates identified by the employer (or group of employers).

Training must be for occupations in industries that have documented skill shortages where developing the skills of the workforce will lead to enhanced career pathways for individual employees. High wages, high costs for recruitment, and/or positions that remain unfilled for long periods of time may indicate a shortage of skills within the workforce.

Training providers must have satisfactory past performance, accreditation, curricula that lead to credentials, relevant training experience and programs, accredited instructors, high job placement rates, and/or high training completion rates. Training providers should also meet acceptable minimum retention rates for trainees in their field or occupation of training.

The training facility must provide an environment that supports learning and be within reasonable proximity to the participant. The training may take place in the business owned facility, a training provider's facility, or combination of sites.

Training provided through the use of customized training does not require ITAs (Individual Training Accounts).

Training providers for customized training either need to be included in the [WIAWIOA](#) Eligible [Training Provider List \(ETPL\)](#) - published online in the Maine [Job Link \(MJL\) Career Center Consumer Report System \(MCCRS\)](#), or must be competitively procured.

Employer Guidelines:

Employer-(s) must agree that successful completion of the customized training will result in portable skills, and retention and placement of the trainee into permanent employment that offers competitive pay and company benefits and any other fringe benefits offered to all company employees, with opportunities for career advancement; and, that continued training will be provided for trainees who need help with remedial skills or other skills in order to retain their jobs, after completion of customized training; and, that training will be aligned with industry or employer recognized skill standards, as defined by the [WIB-LWB](#) and/or the employer (s).

Employer(s) must agree to release employed/incumbent workers to participate in training and to meet core and intensive requirements and pay them their wages.

Businesses should be current on their local, state and federal tax obligations and compliant with all environmental requirements.

Businesses that provide additional sources of funding to support the training will be given strong consideration.

Businesses that have employees in a lay-off status will not be considered for customized training unless the training would avert additional layoffs.

Businesses that have relocated to Maine and laid-off workers at their original location in the United States will not be considered for customized training, until they have been in operation at the new location for 120 days. To verify that a business is not relocating employment from another area, a pre-award review must be undertaken and documented by the ~~local~~ WIBLWB. The review must include the names under which the establishment conducts business, including predecessors and successors in interest; the name, title, and address of the company official certifying the information, and whether ~~WIAWIOA~~ assistance is being sought in connection with past or impending job losses at other facilities of their company.

Contracts may not be written with employers who have previously exhibited a pattern of failing to provide Customized Training customers with continued long-term 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.

Employer Payments:

The LWIBLWB will implement the waiver of a reduction of the 50% match. Employers will pay a range of 10% to 50% of the cost of the customized training depending on the size of the business*. The LWIBLWB will negotiate with the employer the amount of customized training activities costs the employer will be responsible for beyond the percent range.

Funds provided to employers for Customized Training must not be used to directly assist, promote, or deter union organizing.

*The proposed employer match sliding scale will range from 10% to 50% based on the following employer size:

- Match up to 90% for employers with 50 or fewer employees; and
- Match up to 75% for employers with 51-200 employees; and
- Match up to 50% for employers with 200 or more employees.

Contracts:

The Workforce ~~Investment Board~~ Development Board will consider approval of contracts which specify: the employer's assurance that customized training is needed based upon the individual skill sets of trainees, cost, industry type, demand occupation, the occupation(s) of trainees, the number of employees to be trained, job description(s) of the trainees and a training outline, the skills and competencies to be learned, the length of time the training will be provided, the cost and documented description of any ancillary items or supportive services that may be needed, and other appropriate training outcomes related to the training including increases in earnings, career advancement, portable skills, and retention. The agreement must also specify what the employer will pay for, the employer match portion for the cost of the training, and according to what payment percent and method.

Allowable costs may include only costs directly related to training. Allowable costs include, but are not limited to the following: instructor's / trainer's training-related wages, curriculum development, textbooks, instructional equipment, manuals, materials and supplies.

Unallowable costs include but are not limited to: trainees' benefits/fringes; wages of trainees while attending customized training, costs that are not directly related to customized training for eligible individuals under Title I, foreign travel, and/or purchase of capital equipment.

Customized training agreements are to contain appropriate assurances and certifications as specified in this issuance.

Written endorsement from a union official is required when the workplace is covered by a collective bargaining agreement.

When working with a group of employers (employer consortiums), the local WIB may decide with whom to contract and the details set forth therein. If the consortium is a legal entity and the participating employers are in agreement on their match requirements, the local WIB may contract with the consortium directly and accordingly, the match requirement would be paid by the consortium. It is also allowable to enter into individual contracts with each participating employer. Regardless of what entity the contract is with all requirements, expected outcomes, and assurances described in this issuance must be met.

All contracts must have employee outcomes that meet the [WIAWIOA](#) common measures.

The [LWIBLWB](#) will allow service providers to change [WIAWIOA](#) enrollment numbers as necessary to accommodate the number of customized training contracts that are written.

Priority will be given first to employers or group of employers who are located within the Central /Western Maine [LWIBLWB](#) geographic area and second, to employers or group of employers who are located outside of the Central /Western Maine [LWIBLWB](#) geographic area but employ workers from the local area.

Employers or group of employers who are located outside of the Central/Western Maine [LWIBLWB](#) geographic area and who do not employ workers from the area will not be considered.

Customized Training contracts will be limited to the period of time required for a customer to become proficient in the occupation for which the training is being provided based on information from the employer, the Specific Vocational Preparation (SVP) information found on O*Net on the Snapshot screen for each occupation (as well as skill requirements of the occupation), the academic and occupational skill level of the customer (s), prior work experience, and the customer (s) individual employment plan (s). In no case will a customized training contract exceed 1040 hours.

Customized Training jobsites will be monitored periodically to assure validity and propriety of amounts claimed for reimbursement.

Labor Standards:

Training provided must be in accordance with [WIAWIOA](#) sec. 667-270 for non-displacement assurances, [WIAWIOA](#) sec. 667-272 for wage and labor standards, [WIAWIOA](#) sec. 667-274 (A) and (b) (1) for health and safety standards, and [WIAWIOA](#) sec. 667.275 for nondiscrimination and equal opportunity assurances.

Customers must receive the same benefits and have the same working conditions as similarly employed workers.

Customer Flow Process for Customized Training:

Employer

1. Identify a skill shortage and type of training needed.
2. Identify possible trainees from among incumbent workers.
3. Discuss training needs with [CareerCenter-Service Provider](#) Staff.
4. Discuss Customized Training and other training options with [Service Provider](#)~~CareerCenter~~-staff and proceed as indicated.
5. Provide a tour or job shadowing experience for potential trainees.
6. Commit to provide or facilitate the training and retain the trainees upon training completion.
7. Notify [Service Provider](#)~~CareerCenter~~ Staff at completion of the training
8. Agree to participate in follow-up activities to determine employment retention and wages six months after employment and/or at other designated intervals.

Participant

1. Complete ~~WIA~~WIOA registration and provide eligibility verification documents.
2. Register for Core and Intensive Services.
3. If previous services have not resulted in employment, discuss training strategy, employment interest, and assessment test scores (if available) with case manager/counselor.
4. Establish an employment goal (independently or with staff assistance) based on # 3 and on labor market review to determine potential employers.
5. If the occupation is unfamiliar, request that the case manager/counselor arrange a tour or a job shadowing experience with an appropriate employer.
6. Work with the case manager/counselor to determine appropriate training strategies and develop an individual employment plan.
7. Commit to complete the training and retain employment upon completion.
8. Notify the case manager/counselor upon completion of the training. Agree to participate in follow-up activities to determine employment retention and wages six months after ~~—~~employment and at other designated intervals.

Direct Inquiries:

Executive Director

Central ~~W~~Western Maine ~~WIB~~Workforce Development Board

~~5 Mollison Way Lewiston, ME 04240~~

~~207.753.9011-PO Box 7083~~

~~Lewiston, ME 04240~~

~~Policy approved at CWMWIB Board meeting on June 21, 2013~~

CENTRAL WESTERN MAINE WORKFORCE DEVELOPMENT BOARD
POLICIES AND PROCEDURES

POLICY	#22-02 Youth Incentive Policy and Procedure
AUTHORITY	20 CFR § 681.640, 2 CFR § 200, TEGL #21-16
EFFECTIVE DATE	TBD
REVISION DATE(S)	October 1, 2022
APPLIES TO	WIOA Title IB Youth Program and Staff

History

As provided for under the Workforce Innovation and Opportunity Act (WIOA) and the WIOA Final Rules, the Central Western Maine Workforce Development Board has defined the WIOA Youth Incentive Policy and Procedure.

Purpose

The purpose of this policy is to communicate local policy regarding the expected use of incentives for WIOA-enrolled youth. Incentives encourage participation or reward participants for achieving specific elements. An incentive is a payment to an eligible WIOA Youth participant for the successful participation and achievement of expected outcomes as defined in the individual's Individual Service Strategy (ISS).

Provision

The incentive must be linked to an achievement and must be tied to training and education, work readiness skills and/or an occupational skills attainment goal as identified in the ISS. Achievements must be documented in Maine Job Link (MJL) and in the participant's file as the basis for an incentive payment. If the youth has exited the WIOA Youth enrollment and is in WIOA Youth Follow-up the youth is still eligible to receive incentives.

Policy

WIOA enrolled youth may be eligible for incentive payments once they have reached pre-determined milestones in their participation period and **have submitted verification of these milestones.**

Milestones for actively participating youth are described as:

- | | |
|---|----------|
| 1. Open a direct deposit checking account | \$25.00 |
| 2. Obtainment of high school diploma or equivalent | \$100.00 |
| 3. Attainment of certificate, license, or degree | \$100.00 |
| 4. Serving in a leadership role as a peer mentor at youth academy (each time) | \$75.00 |

WIOA staff will outline incentive policies with participant by explaining the WIOA Incentive Plan Contract (see attached) at time of plan development. This contract will be signed by staff and participant and maintained in the MJL participant record with a copy given.

Once WIOA youth staff have verified that participant is eligible for one of the above, staff must create an authorization for the incentive in MJL. In addition, comments must be entered in the MJL record and on the ISS detailing each milestone achieved and incentive given. It is the responsibility of the requesting staff to complete required paperwork/documentation and make all comment entries.

Unless otherwise approved, incentive disbursements will be in the form of direct deposit or check (only if a checking account is not available), not to exceed corresponding amount and disbursements are limited to the actual incentives available at time of request unless other arrangements are approved. Selection/choice of gift cards may be prioritized if unsure of availability. Incentives may not include entertainment, such as movie or sporting event tickets or gift cards to movie theaters or other venues whose sole purpose is entertainment.

WIOA Youth Incentives are not intended as emergency assistance, but rather as a compliment to services provided and/or recognition of youth's personal attainment goals. WIOA Youth in need of emergency assistance must be referred to appropriate service provider. WIOA Youth Incentives are not meant to replace available Support Services and Individual Training Account limits as defined in local area policies, and incentive amounts should not be considered as part of other policy limits.

CENTRAL WESTERN MAINE WORKFORCE DEVELOPMENT BOARD
WIOA OSY INCENTIVE PLAN CONTRACT

DATE: _____ MJL ID: _____

NAME: _____

PHONE: _____

ADDRESS: _____
(#) (Street) (City) (State) (Zip)

Purpose of the Plan

- 1) To provide a cash incentive for active youth participants to earn or obtain:
 - a) Direct Deposit Checking Account;
 - b) High School Diploma or High School Equivalency Diploma;
 - c) Completion of training or education and receipt of a certificate, degree, or license;
 - d) Serving in a leadership role as a peer mentor at youth academy (each time)

Eligibility Criteria

- 1) Enrolled as WIOA OSY;
- 2) A copy of diploma/degree/completion certificate/license, direct deposit, or paystub must be provided as evidence that incentive milestone has been earned;
- 3) Actively participating with program and in contact with WIOA staff.

Incentives

- | | |
|---|---------------|
| 1) I will receive \$25.00 to open a direct deposit checking account. | Initial _____ |
| 2) Upon obtaining a High School Diploma or Equivalent, I will earn; \$100.00. | Initial _____ |
| 3) Upon obtaining a Certificate, Degree, or License, I will earn; \$100.00. | Initial _____ |
| 4) Serve in a leadership role as a peer mentor, I will earn; \$75.00. | Initial _____ |

Agreement

I _____, understand and acknowledge that, by participating with the
(Participant name, Print)
Central Western Maine Region III WIOA Out of School Youth Program, I may earn incentives as outlined
in the above contract, based on funds available for incentive programs.

Participant Signature

Date

WIOA OSY Staff

Date

Central Western Maine Workforce Development Board

Data as of April 21, 2022

	PY21 Q1			PY21 Q2			PY21 Q3			PY21 Q4			PY21 Annual to Date		
ADULT Service Summary	Goal	Actual	Attained	Goal	Actual	Attained	Goal	Actual	Attained	Goal	Actual	Attained		Actual	Attained
A. New Enrollments	20	37	185.0%	40	66	165.0%	60	109	181.7%	80	116	145.0%			
B. Carry-Ins	70	51	72.9%	70	51	72.9%	70	51	72.9%	70	51	72.9%			
C. Total Adult Enrollments (A+B)	90	88	97.8%	110	117	106.4%	130	160	123.1%	150	167	111.3%			
D. Total Exiters	25	28	112.0%	50	58	116.0%	65	58	89.2%	85	58	68.2%			
E. Total Entered Employment	18	12	66.7%	38	22	57.9%	50	22	44.0%	63	22	34.9%			
3. Placed in Apprenticeship	3	0	0.0%	6	0	0.0%	10	0	0.0%	10	0	0.0%			
ADULT Standards/Goals															
A. Direct Training	75	49	65.3%	92	71	77.2%	109	91	83.5%	126	94	74.6%			
B. Career Services	90	84	93.3%	110	112	101.8%	130	153	117.7%	150	159	106.0%			
ADULT Performance Measures		%													
A. Employed 2nd Qtr. after Exit		55.17%	75.6%		70.00%	95.9%		62.50%	85.6%	73%	51.85%	71.0%	73%	57.32%	78.5%
B. Employed 4th Qtr. after Exit		77.78%	108.8%		72.22%	101.0%		55.17%	77.2%	71.50%	40.00%	55.9%	71.50%	62.67%	87.7%
C. Median Wage 2nd Qtr after exit.		\$6,237	117.7%		\$4,124.25	77.8%		\$7,567.31	142.8%	\$5,300	\$5,016.05	94.6%	\$5,300	\$5,426	102.4%
D. Attained Credential		31.25%	46.0%		85.71%	126.0%		50.00%	73.5%	68%	33.33%	49.0%	68%	50.75%	74.6%
E. Measurable Skills Gains		14.89%	27.1%		35.85%	65.2%		6.79%	12.3%	55%	0.00%	0.0%	55%	36.26%	65.9%
DW Service Summary															
A. New Enrollments	15	6	40.0%	30	11	36.7%	40	16	40.0%	48	18	37.5%			
B. Carry-Ins	40	42	105.0%	40	42	105.0%	40	42	105.0%	40	42	105.0%			
C. Total DW Enrollments (A+B)	55	48	87.3%	70	53	75.7%	80	58	72.5%	88	60	68.2%			
D. Total Exiters	16	15	93.8%	28	28	100.0%	38	30	78.9%	52	30	57.7%			
E. Total Entered Employment	13	10	76.9%	22	17	77.3%	30	18	60.0%	42	18	42.9%			
3. Placed in Apprenticeship	2	0	0.0%	4	0	0.0%	5	0	0.0%	7	0	0.0%			
DW Standards/Goals															
A. Direct Training	44	38	86.4%	56	34	60.7%	64	45	70.3%	70	47	67.1%			
B. Career Services	55	48	87.3%	70	42	60.0%	80	57	71.3%	88	58	65.9%			
DW Performance Measures															
A. Employed 2nd Qtr. after Exit		80%	98.8%		76.92%	95.0%		72.22%	89.2%	81%	82.61%	102.0%	81%	77.97%	96.3%
B. Employed 4th Qtr. after Exit		75%	98.7%		50.00%	65.8%		80.00%	105.3%	76%	64.62%	85.0%	76%	75.00%	98.7%
C. Median Earnings 2nd Qtr. after Exit		\$3,962.67	61.0%		\$8,426.10	129.6%		\$8,312.38	127.9%	\$6,500	\$10,432.30	160.5%	\$6,500	\$8,497.06	130.7%
D. Attained Credential		66.67%	102.6%		60.00%	92.3%		100.00%	153.8%	65%	81.82%	125.9%	65%	79.17%	121.8%
E. Measurable Skills Gains		20%	36.4%		33.30%	60.5%		8.70%	15.8%	55%	0.00%	0.0%	55%	51.11%	92.9%
YOUTH Service Summary (Aged 14-21)															
A. New In-School Enrollments	10	0	0.0%	15	0	0.0%	20	0	0.0%	25	1	4.0%			
B. In-School Carry-Ins	5	0	0.0%	5	0	0.0%	5	0	0.0%	5	0	0.0%			
C. New Out-of-School Enrollments	15	19	126.7%	35	28	80.0%	50	41	82.0%	60	42	70.0%			
D. Out-of-School Carry-Ins	30	24	80.0%	30	24	80.0%	30	24	80.0%	30	24	80.0%			
E. Total Enrollments (A+B+C+D)	60	43	71.7%	85	52	61.2%	105	65	61.9%	120	67	55.8%			

F. Total Exitters	10	10	100.0%	25	23	92.0%	35	24	68.6%	48	24	50.0%			
G. Total Employed or In Education	7	8	114.3%	19	16	84.2%	26	16	61.5%	36	16	44.4%			
3. Placed in Apprenticeship	1	0	0.0%	2	0	0.0%	3	0	0.0%	4	0	0.0%			
YOUTH Performance Measures															
A. Employed / in Education 2nd Qtr. after exit		80%	112.7%		50.00%	70.4%		71.43%	100.6%	71%	41.67%	58.7%	71%	60.61%	85.4%
B. Employed / in Education 4th Qtr. after exit		66.67%	91.3%		57.14%	78.3%		80.00%	109.6%	73.00%	25.00%	34.2%	73.00%	62.96%	86.2%
C. Median Wage 2nd Qtr. After exit		\$4,225.51	111.2%		\$7,120.51	187.4%		\$2,753.15	72.5%	\$3,800	\$6,565.79	172.8%	\$3,800	\$4,302.47	113.2%
D. Attained Credential		50%	90.9%		83.33%	151.5%		25.00%	45.5%	55%	33.33%	60.6%	55%	52.94%	96.3%
E. Measurable Skills Gains		6.67%	14.8%		31.25%	69.4%		15.79%	35.1%	45%	0.00%	0.0%	45%	41.38%	92.0%
ONDWG Service Summary	July-Sept 2021			Oct-Dec 2021			Jan-Mar 2022			Apr-Jun 2022					
Intensive Services	65	63	96.9%	91	72	79.1%	116	82	70.7%	153	91	59.5%			
Training Enrollments - Total	56	11	19.6%	53	19	35.8%	64	25	39.1%	89	29	32.6%			
Classroom	49	11	22.4%	43	18	41.9%	52	24	46.2%	74	28	37.8%			
OJT	7	0	0.0%	8	1	12.5%	12	1	8.3%	15	1	6.7%			
Disaster Relief Employment	3	5	166.7%	5	6	120.0%	5	9	180.0%	6	9	150.0%			
Supportive Services	65	26	40.0%	62	33	53.2%	81	43	53.1%	98	49	50.0%			
Exits	23	39	169.6%	40	48	120.0%	65	48	73.8%	95	48	50.5%			
Entered Employment	14	8	57.1%	24	10	41.7%	40	10	25.0%	59	10	16.9%			
Entered Employment Rate	61%	20.5%	33.6%	60%	20.8%	34.7%	62%	20.8%	33.6%	62%	20.8%	33.6%			
ONDWG Performance Measures													Based on rolling 4 quarters		
A. Employed 2nd Qtr. after Exit	61%	0.00%	0.0%	61%	100.00%	163.9%	61%	42.86%	70.3%	61%	38.46%	63.0%	61%	42.86%	70.3%
B. Employed 4th Qtr. after Exit	62%	0.00%	0.0%	62%	0.00%	0.0%	62%	0.00%	0.0%	62%	0.00%	0.0%	62%	0.00%	0.0%
C. Median Earnings 2nd Qtr. after Exit	\$5,110.00	\$0.00	0.0%	\$5,110.00	\$400.95	7.8%	\$5,110.00	\$8,409.25	164.6%	\$5,110	\$1,085.97	21.3%	\$5,110	\$4,040.55	79.1%
D. Attained Credential	62%	0.00%	0.0%	63%	0.00%	0.0%	63%	0.00%	0.0%	63%	0.00%	0.0%	63%	0.00%	0.0%
COVID-19 Service Summary	July-Sept 2021			Oct-Dec 2021			Jan-Mar 2022			Apr-Jun 2022					
Total Enrollments	35	45	128.6%	60	65	108.3%	76	104	136.8%	90	110	122.2%			
Total Exitters	30	22	73.3%	54	32	59.3%	72	34	47.2%	87	34	39.1%			
Total Entered Employment	20	9	45.0%	35	12	34.3%	48	12	25.0%	58	12	20.7%			
Entered Employment Rate	67%	40.9%	61.1%	67%	37.5%	56.0%	67%	35.3%	52.7%	67%	35.3%	52.7%			
Disaster Relief Employment	6	5	83.3%	6	8	133.3%	6	8	133.3%	6	8	133.3%			
COVID-19 Performance Measures													Based on rolling 4 quarters		
A. Employed 2nd Qtr. after Exit		0.00%	#DIV/0!		0.00%	#DIV/0!		75.00%	#DIV/0!		66.67%	#DIV/0!		71.43%	#DIV/0!
B. Employed 4th Qtr. after Exit		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!
C. Median Earnings 2nd Qtr. after Exit		\$0.00	#DIV/0!		\$0	#DIV/0!		\$11,410.26	#DIV/0!		\$7,599.89	#DIV/0!		11410.26	#DIV/0!
D. Attained Credential		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!
E. Measurable Skills Gains		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!		0.00%	#DIV/0!
Effectiveness in Serving employers															
1. Penetration Rate		343	#DIV/0!		501	#DIV/0!		621	#DIV/0!		682	#DIV/0!			
2. Repeat Business		242	#DIV/0!		323	#DIV/0!		383	#DIV/0!		405	#DIV/0!			

**Central Western Maine Workforce Development Board
Budget to Actual by Contract as of February 28, 2022**

Contract	Contract Start Date	Contract End Date	Program			Admin			Total		
			Budget	Actual through 02/28/22	% Spent	Budget	Actual through 02/28/22	% Spent	Budget	Actual through 02/28/22	% Spent
WIOA Formula Funds											
WIOA PY20	7/1/20	6/30/22									
Adult			567,603	410,807	72%	63,067	63,067	100%	630,670	473,874	75%
Youth			583,921	217,242	37%	64,880	64,880	100%	648,801	282,122	43%
Dislocated Worker			451,019	291,126	65%	50,113	50,113	100%	501,132	341,239	68%
Total WIOA PY20			1,602,543	919,175	57%	178,060	178,060	100%	1,780,603	1,097,235	62%
WIOA PY21	7/1/21	6/30/23									
Adult			561,297	-	0%	62,366	-	0%	623,663	-	0%
Youth			578,124	-	0%	64,236	46,683	73%	642,360	46,683	7%
Dislocated Worker			402,366	-	0%	44,707	-	0%	447,073	-	0%
Total WIOA PY21			1,541,787	-	0%	171,309	46,683	27%	1,713,096	46,683	3%
Discretionary Funds											
NDWG Opioid	3/1/20	12/31/22	760,014	545,865	72%	84,446	64,835	77%	844,460	610,700	72%
NDWG COVID	8/10/20	6/30/22	463,500	221,926	48%	51,500	26,272	51%	515,000	248,198	48%
Career DWG	12/1/21	9/23/23	219,824	-	0%	24,424	178	1%	244,248	178	0%

**Central Western Maine Workforce Development Board
FY 6/30/21 Administrative Budget vs. Actuals as of February 28, 2022**

Funding Overview (Multi-Year)	PY20 WIOA	PY21 WIOA	NDWG COVID-19	NDWG Opioid	Career DWG	Total
Contract No.	20200604*3712	20210524*3366	20200820*0646	TBD	20211201*1334	
Start Date	7/1/20	7/1/21	8/10/20	7/1/21	12/1/21	
End Date	6/30/22	6/30/23	6/30/22	12/31/22	9/23/23	
Award Amount	\$ 1,780,603	\$ 1,713,096	\$ 515,000	\$ 1,677,177	\$ 244,248	\$ 6,326,688
Admin	178,060	171,309	51,500	167,458	24,424	622,899
Program	1,602,543	1,541,787	463,500	1,509,719	219,824	5,459,541
Spent as of 4/30/21	30,482	-	80,502	-	-	345,904
Admin	30,482	-	14,713	-	-	99,767
Program	-	-	65,789	-	-	246,137
Estimated Spend May-Jun 2021	331,217	-	28,196	-	-	429,950
Admin	54,739	-	2,972	-	-	57,711
Program	276,478	-	25,224	-	-	372,239
Estimated Reserve for FY 23+	-	112,757	-	-	244,248	112,757
Admin	-	112,757	-	-	24,424	112,757
Program	-	-	-	-	219,824	-
FY 21-22	1,418,903	1,600,339	406,302	1,677,177	-	5,566,068
Admin	92,839	58,552	33,816	167,458	-	352,664
Program (Estimated)	1,326,065	1,541,787	372,487	1,509,719	-	5,213,404

Detailed Administrative Budget	PY20 WIOA	PY21 WIOA	NDWG COVID-19	NDWG Opioid	Career DWG	Total
Salaries	\$ 20,150	\$ 12,708	\$ 29,288	\$ 114,836	\$ -	\$ 176,981
Fringe Benefits	5,176	3,265	4,528	38,978	-	51,946
Travel	341	215	-	1,944	-	2,500
Supplies	409	258	-	2,333	-	3,000
Other						
Outreach, Mktg & Advertising	3,986	2,514	-	-	-	6,500
Bank Fees & Interest Expense	153	97	-	-	-	250
Conferences	1,533	967	-	-	-	2,500
Contractual	761	480	-	4,335	-	5,575
Dues and Subscriptions	1,226	774	-	-	-	2,000
Insurance	1,533	967	-	-	-	2,500
Organization Expense	21	14	-	-	-	35
Payroll Processing Fees	862	543	-	-	-	1,405
Professional Fees						
Audit	6,132	3,868	-	-	-	10,000
Fiscal Mgmt.	34,035	21,465	-	-	-	55,500
Fiscal Monitoring	1,840	1,160	-	-	-	3,000
Legal	1,840	1,160	-	-	-	3,000
Postage & Delivery	61	39	-	-	-	100
Recruiting	341	215	-	1,944	-	2,500
Rent, Parking, Utilities	3,679	2,321	-	-	-	6,000
Software	8,349	5,266	-	757	-	14,372
Telephone and Network	409	258	-	2,333	-	3,000
Total, Administrative	92,839	58,552	33,816	167,458	-	352,664

YTD Actuals	
2/28/22	
84,346	48%
27,398	53%
589	24%
1,120	37%
514	8%
398	159%
-	0%
-	0%
2,097	105%
2,205	88%
35	100%
1,550	110%
-	-
-	0%
31,050	56%
-	0%
-	0%
228	228%
5,804	232%
3,700	62%
6,574	46%
1,188	40%
168,795	48%

Central Western Maine Workforce Development Board
Budget to Actual by Contract as of March 31, 2022

Contract	Contract Start Date	Contract End Date	Program			Admin			Total		
			Budget	Actual through 03/31/22	% Spent	Budget	Actual through 03/31/22	% Spent	Budget	Actual through 03/31/22	% Spent
WIOA Formula Funds											
WIOA PY20	7/1/20	6/30/22									
Adult			567,603	462,754	82%	63,067	63,067	100%	630,670	525,821	83%
Youth			583,921	259,970	45%	64,880	64,880	100%	648,801	324,850	50%
Dislocated Worker			451,019	313,690	70%	50,113	50,113	100%	501,132	363,803	73%
Total WIOA PY20			1,602,543	1,036,415	65%	178,060	178,060	100%	1,780,603	1,214,475	68%
WIOA PY21	7/1/21	6/30/23									
Adult			561,297	-	0%	62,366	-	0%	623,663	-	0%
Youth			578,124	-	0%	64,236	61,215	95%	642,360	61,215	10%
Dislocated Worker			402,366	-	0%	44,707	315	1%	447,073	315	0%
Total WIOA PY21			1,541,787	-	0%	171,309	61,530	36%	1,713,096	61,530	4%
Discretionary Funds											
NDWG Opioid	3/1/20	12/31/22	760,014	579,205	76%	84,446	64,997	77%	844,460	644,201	76%
NDWG COVID	8/10/20	6/30/22	463,500	236,789	51%	51,500	26,332	51%	515,000	263,122	51%
Career DWG	12/1/21	9/23/23	219,824	-	0%	24,424	178	1%	244,248	178	0%

Central Western Maine Workforce Development Board
FY 6/30/21 Administrative Budget vs. Actuals as of March 31, 2022

Funding Overview (Muti-Year)	PY20 WIOA	PY21 WIOA	NDWG COVID-19	NDWG Opioid	Career DWG	Total
Contract No.	20200604*3712	20210524*3366	20200820*0646	TBD	20211201*1334	
Start Date	7/1/20	7/1/21	8/10/20	7/1/21	12/1/21	
End Date	6/30/22	6/30/23	6/30/22	12/31/22	9/23/23	
Award Amount	\$ 1,780,603	\$ 1,713,096	\$ 515,000	\$ 1,677,177	\$ 244,248	\$ 6,326,688
Admin	178,060	171,309	51,500	167,458	24,424	622,899
Program	1,602,543	1,541,787	463,500	1,509,719	219,824	5,459,541
Spent as of 4/30/21	30,482	-	80,502	-	-	345,904
Admin	30,482	-	14,713	-	-	99,767
Program	-	-	65,789	-	-	246,137
Estimated Spend May-Jun 2021	331,217	-	28,196	-	-	429,950
Admin	54,739	-	2,972	-	-	57,711
Program	276,478	-	25,224	-	-	372,239
Estimated Reserve for FY 23+	-	112,757	-	-	244,248	112,757
Admin	-	112,757	-	-	24,424	112,757
Program	-	-	-	-	219,824	-
FY 21-22	1,418,903	1,600,339	406,302	1,677,177	-	5,566,068
Admin	92,839	58,552	33,816	167,458	-	352,664
Program (Estimated)	1,326,065	1,541,787	372,487	1,509,719	-	5,213,404

Detailed Administrative Budget	PY20 WIOA	PY21 WIOA	NDWG COVID-19	NDWG Opioid	Career DWG	Total
Salaries	\$ 20,150	\$ 12,708	\$ 29,288	\$ 114,836	\$ -	\$ 176,981
Fringe Benefits	5,176	3,265	4,528	38,978	-	51,946
Travel	341	215	-	1,944	-	2,500
Supplies	409	258	-	2,333	-	3,000
Other						
Outreach, Mktg & Advertising	3,986	2,514	-	-	-	6,500
Bank Fees & Interest Expense	153	97	-	-	-	250
Conferences	1,533	967	-	-	-	2,500
Contractual	761	480	-	4,335	-	5,575
Dues and Subscriptions	1,226	774	-	-	-	2,000
Insurance	1,533	967	-	-	-	2,500
Organization Expense	21	14	-	-	-	35
Payroll Processing Fees	862	543	-	-	-	1,405
Professional Fees						
Audit	6,132	3,868	-	-	-	10,000
Fiscal Mgmt.	34,035	21,465	-	-	-	55,500
Fiscal Monitoring	1,840	1,160	-	-	-	3,000
Legal	1,840	1,160	-	-	-	3,000
Postage & Delivery	61	39	-	-	-	100
Recruiting	341	215	-	1,944	-	2,500
Rent, Parking, Utilities	3,679	2,321	-	-	-	6,000
Software	8,349	5,266	-	757	-	14,372
Telephone and Network	409	258	-	2,333	-	3,000
Total, Administrative	92,839	58,552	33,816	167,458	-	352,664

YTD Actuals	
3/31/22	
90,016	51%
27,753	53%
589	24%
1,221	41%
834	13%
418	167%
-	0%
-	0%
2,302	115%
2,205	88%
35	100%
1,761	125%
-	-
-	0%
36,675	66%
-	0%
1,712	57%
357	357%
5,804	232%
4,100	68%
6,993	49%
2,585	86%
185,359	53%

High-Risk Letter Response Tracker

ITEM	TASK	RESPONSIBLE PARTY(S)	STATUS	DATE COMPLETE
Subrecipient Award Agreements	Copies of corrected versions of subrecipient award agreements must be provided to MDOL, including PY20 and PY21 formula awards, COVID and OPIOID DWG awards, and any amendments to those awards. Corrected versions must include required data and remove unallowable clauses and references to state statutes that only apply to state government employees. Corrected versions must include the full amount of funds designated to go to the subrecipient for the full period of performance (2 years). The Opioid award must include grant-specific requirements, as we discussed, this can wait until you provide the third-tier funding amendment to this grant.	Executive Director, Board Chair	NOT STARTED	
Update CWMWDB Financial Policy Manual	CWMWDB must ensure its Financial Policy Manual includes the following requirements: numbers A-L as written in the High Risk Letter response from MDOL dated 3/25/22	Finance Focus Group, Full Board (vote)	NOT STARTED	
Create Local Area III Youth W/E Policy	CWMWDB must issue a Youth Work Experience policy to the service provider regarding the requirement that a minimum of 20% of youth program funds must be spent on work experience activities. This policy should include the types of expenditures that can be included in this cost category, such as staff wages while developing and monitoring work experience sites with employers.	Youth Committee, Full Board (vote)	NOT STARTED	
Update Personnel Policy	CWMWDB must ensure its Personnel Policy identifies/includes: •The board member the position of executive director reports to, •Processes for employee recruitment, selection, oversight, promotion, disciplinary action, and the board member that must approve such actions, and •Identifies that harassment, bullying, defamation, threats, extortion, and similar behavior will not be tolerated.	Personnel Focus Group, Full Board (vote)	NOT STARTED	
Review and Approve Local Area III Grievance Policy	CWMWDB must ensure the WIOA Grievance Policy is approved by the Board.	Full Board (vote)	for full board vote on 1/27/2022	1/27/2022
Document Board Staff Training	CWMWDB must ensure Board staff complete the SMART grant management training series and have reviewed, understood, and will apply:	Executive Director, Board Chair (sign)	DONE; just need to document	
Document Board Staff Training	CWMWDB must document staff understanding of program versus administrative functions and board versus service provider roles.	Executive Director, Board Chair (sign)	DONE; just need to document	
Develop CWMWDB Onboarding Manual (in addition to bylaws)	CWMWDB must develop a board member onboarding manual that clarifies board member roles and functions and CEO roles and functions.	Executive Director	Started, not complete	
Review CWMWDB website: www.cwmwdb.org	Operations Committee members must review the CWMWDB website for: items 4 & 5 as listed in the High-Risk Letter response from MDOL dated 3/25/22	Operations Committee	party tasked on 4/13/22	

PY18 PY19 Monitoring Report Response Tracker

FINDING	CONDITION	CORRECTIVE ACTION TASK	RESPONSIBLE PARTY(S)	STATUS	DATE COMPLETE
1	RESOLVED	RESOLVED	RESOLVED	RESOLVED	RESOLVED
2	The local board website does not contain the Equal Opportunity tagline	To resolve this finding the local board must include the EO tagline on the opening page of the local board website and must include a TTD/TTY Relay service number in addition to the local board phone number. Additionally, CWMWDB should develop a procedure for reviewing all public-facing materials and website to ensure the EO tagline is present and TTY services are available.	Executive Director	2/3 COMPLETE: need to create procedure as mentioned in corrective action	
3	RESOLVED	RESOLVED	RESOLVED	RESOLVED	RESOLVED
4	CWMWDB's policy "WIA Youth Sixth Barrier Definition" is outdated and does not follow WIOA provisions for "Youth Requiring Additional Assistance."	To resolve this finding CWMWDB must: items 1-7 as listed on the PY18 PY19 Monitoring Report	Program Policy Review Committee, Full Board (vote)	IN PROGRESS	
5	Lack of CEO by-laws pertaining to local board membership.	To resolve this finding CWMWDB must provide a copy of the CEO by-laws that meet the requirements listed in the criteria.	Executive Director, CEO Board (vote)	COMPLETE	3/28/2022
6	Lack of required document uploads (work experience agreements, on-the-job training contracts, signed employment and training plans, records documenting measurable skill gains and credential attainment, documents supporting eligibility)	Documents that validate performance and/or eligibility are required to be uploaded to participant files, staff must be made aware of these requirements and the related policy and guidance. To resolve this finding, files identified as lacking uploaded documentation must be made compliant by locating and uploading the required documents. Additionally, case managers must receive training on document upload requirements identified in Policy PY15-21, TEGL 23-19, the Data Element Validation Manual, and recent tools developed to help staff understand document upload requirements; additionally, documentation that all case managers have received this training must be provided to BES.	EMDC, Executive Director	COMPLETE	2/2/2022
7	Lack of exit and outcome data in MJL	USDOL conducts a review of all outcome data on a quarterly basis, including focus on training related employment criteria. Proper documentation of post-training employment allows programs to assess whether training services help participants to achieve stated employment goals. All staff must receive training on where in MJL they must respond to this question, documentation that staff have received this training must be provided to BES to resolve this finding.	EMDC, Executive Director	COMPLETE	2/2/2022
8	Youth work experience agreements do not include academic skill development	Youth case managers must receive training on how to identify and build in academic and occupational skill development as part of the work experience activity or must document in the work experience agreement that the youth is receiving academic tutoring in topics that can be directly applied to the work experience activity.	EMDC, Executive Director	COMPLETE	3/28/2022
9	Training provider not pulled from ETPL in MJL.	To resolve this finding WMC staff must be trained on how to select the training provider for occupational training paid with an Individual Training Account (ITA) from the MJL Training Provider dropdown list.	EMDC, Executive Director	COMPLETE	2/2/2022
10	Files pertaining to individuals in occupational skill training lack goals for Measurable Skill Gains (MSGs) and/or lack documentation of achievement of MSGs via uploaded report cards, transcripts, pre-and post-tests showing EFL gains, etc	Staff must be trained on setting goals for and documenting achievement of MSGs for all participants enrolled in occupational or educational training programs. Documentation that staff have received this training must be provided to BES to resolve this finding	EMDC, Executive Director	COMPLETE	2/2/2022
11	Youth lack follow-up services	Service provider staff must receive training on youth follow-up service requirements and the types of actual services that must be provided as appropriate for the individual youth being served based on whether they transition directly into unsubsidized employment or secondary or post-secondary education. To resolve this finding documentation that all staff who serve youth program participants have received training on follow-up services	EMDC, Executive Director	COMPLETE	3/28/2022
12	Many participant files lack budgets; all files lack payments tracking	Case managers and other staff responsible for budgeting and payments approval must be trained in how to establish a budget in MJL and track actual payments using FiscalLink. Evidence of staff training must be provided to BES to resolve this finding	EMDC, Executive Director	COMPLETE	3/28/2022

Committees & Focus Groups

As of April 2022

OPERATIONS COMMITTEE			
<i>Standing Committee of CWMWDB</i>			
NAME	Kelly Aho	Chair	<i>confirmed</i>
	Grant Provost	Vice-Chair	<i>confirmed</i>
	Laurie Glidden	At-Large	<i>confirmed</i>
	Razell Ward	Secretary	<i>confirmed</i>
	Nick Paquet		<i>not confirmed</i>
		non-voting	
	Robert Sezak	community member	<i>confirmed</i>

RECRUITMENT COMMITTEE			
<i>Standing Committee of CWMWDB</i>			
NAME	Kelly Zolad	Chair	<i>not confirmed</i>
	Trampas Hutches		<i>not confirmed</i>
	Kimberley Lindlof		<i>confirmed</i>

YOUTH COMMITTEE			
<i>Standing Committee of CWMWDB</i>			
NAME	Kendra Wheeler	Chair	<i>confirmed</i>
		community organization member	
	unknown	(non-board)	<i>unknown</i>
	unknown	expert (non-board)	<i>unknown</i>
	unknown	expert (non-board)	<i>unknown</i>

RESOURCES COMMITTEE			
<i>Standing Committee of CWMWDB</i>			
NAME	Chris Winstead	Chair	<i>not confirmed</i>
	Laurie Glidden		<i>not confirmed</i>
	Josh Henry		<i>not confirmed</i>
	Bruce Tisdale		<i>not confirmed</i>

FINANCE FOCUS GROUP			
<i>Ad Hoc Committee of CWMWDB</i>			
NAME	Peter Wright	Chair	<i>confirmed</i>
	Chris Winstead		<i>not confirmed</i>
	Andy Patstone		<i>not confirmed</i>

PERSONNEL FOCUS GROUP			
<i>Ad Hoc Committee of CWMWDB</i>			
NAME	Razell Ward	Chair	<i>not confirmed</i>
	Cathy Witherspoon		<i>not confirmed</i>
	Diane Frigon		<i>not confirmed</i>

POLICY REVIEW COMMITTEE

Committee of the CWMWI (non profit entity)

NAME	Blaine Flanders	Chair	<i>confirmed</i>
	Sue LeClair		<i>confirmed</i>
	Tom Fernands		<i>confirmed</i>
	Patti Saarinen		<i>confirmed</i>

2022 Central Western Maine Workforce Development Board Membership List

Created February 2022

Operations Committee List

Name, Title & Organization(s)	Contact Information	County	Role & Committee/Focus Group	Current Membership Term	Board Representation
Kelly Aho Director, Talent Launch at Bonney Staffing	kaho@mytalentlaunch.com (207) 577-1844	Androscoggin	Acting Board Chair; Treasurer		Business
Grant Provost Board of Directors, Maine AFL-CIO	gprovost@iwlocal7.org	Kennebec	Vice Chair		Workforce
Razell Ward Assistant Director Lewiston Adult Education, Lewiston Public Schools	Rward@lewistonpublicschools.org (207) 795-4141 145 Birch Street Lewiston, ME 04240	Androscoggin	Secretary		Required Expert
Laurie Glidden FSS Coordinator, MaineHousing	Lglidden@mainehousing.org (207) 626-4660 26 Edison Drive Augusta, ME 04330	Kennebec	At-Large Member		Workforce
Nick Paquet	nick@ibew1253.org	Androscoggin			Workforce
Robert Sezak Commissioner, Somerset County	robert.sezak@somersetcounty-me.org	Somerset	Non-voting Operations Committee Member; CEO Board Chair	N/A	N/A

Workforce Board List

Name, Title & Organization(s)	Contact Information	County	Role & Committee/Focus Group	Current Membership Term	Board Representation
Diane Frigon Regional Director/Business Enterprise Program (BEP), Bureau of Rehabilitation Services/Division for the Blind and Visually Impaired	Diane.T.Frigon@maine.gov (207) 446-8404 25 Commerce Drive Augusta, ME 04333	Regional			Required Expert
Dr. Josh Henry President and Founder, TimberHP by GO Lab	josh@golab.us joshua.henry@timberhp.com (207) 431-4869 Office (207) 815-5429 PO Box 119 Madison, ME 04950 General: info@timbrerhp.com	Franklin			Business
Trampas Hutches MHA, BSRT, RT (R)(CT)(MR) President, Franklin Community Health Network	thutches@fchn.org (207) 779-2265 111 Franklin Health Cmns. Farmington, ME 04938	Franklin			Business
Steve Jorgensen President, St. Mary's Health System	Sjorgensen@covh.org (207) 777-8239 93 Campus Ave Lewiston, ME 04243	Androscoggin			Business
Susan LeClair CareerCenter Manager, Augusta, Northern Kennebec Valley and Rockland	susan.a.leclair@maine.gov (207) 530-0520 45 Commerce Drive 55 SHS Augusta, ME 04330	Kennebec			Required Expert
Kimberly Nadeau Lindlof CEO & President, Mid Maine Chamber of Commerce; and	kimberly@midmainechamber.com Office (207) 873-3315 Cell (207) 649-6676 50 Elm Street	Regional		10/1/2021 - 12/31/2023	Required Expert

Executive Director, Central Maine Growth Council	Waterville, ME 04901				
Bruce Noddin Executive Director, Maine Prisoner Re-entry Network	bruce@re-entrymaine.org (207) 330-1446	Regional		10/1/2021 - 12/31/2023	Required Expert
Andrea Patstone President, Stephens Memorial Hospital/MaineHealth	patsta@wmhcc.org (207) 744-6019 181 Main Street Norway, ME 04268	Oxford		1/1/2022 - 12/31/2024	Business
VACANT	VACANT	VACANT	VACANT		Business
Bruce Tisdale President, Mountain Machine Works	bruce@mountainmachineworks.com	Androscoggin		1/1/2022 - 12/31/2024	Business
Jim Trundy Executive Director, Western Maine Community Action	jtrundy@wmca.org	Regional			Workforce
Kendra Wheeler Branch Manager, Bangor Savings Bank	Kendra.Wheeler@bangor.com Cell (207) 522-0754 Office (207) 782-2133 882 Lisbon Street Lewiston, ME 04240	Androscoggin	Youth Committee	10/1/2021 - 12/31/2023	Business
Christopher Winstead Deputy Executive Director for Workforce Training, Maine Community College System	cwinstead@mccs.me.edu Office (207) 629-4035 Mobile (207) 307-9779 323 State Street Augusta, Maine 04330	Regional		1/1/2022 - 12/31/2024	Required Expert
Cathy Witherspoon Chief Human Resources Officer,	cwitherspoon@boyneresorts.com (207) 807-3153	Franklin			Business

Boyne Resorts	1351 Charlevoix Ave. Petoskey, MI 49770				
Peter J. Wright President of Bridgton & Rumford Hospitals, Central Maine Healthcare	Wrightpe@cmhc.org 207-647-6301 10 Hospital Drive Bridgton, ME 04009	Oxford	Finance Focus Group		Business
Kelly Zolad Director of Human Resources, Sunday River Skiway	kelly.zolad@sundayriver.com (207) 824-5018 Office (207) 824-5018 15 South Ridge Rd Newry, ME 04261	Oxford		1/1/2022 - 12/31/2024	Business