



*Building partnerships to create workforce opportunities that cultivate business,  
grow jobs, develop people, and build community.*

**Board of Directors and Chief Elected Officials Consortium Meeting**  
**Thursday, January 19, 2023, 10:00 a.m. – 12:00 p.m.**  
**Harrisonburg City Hall, Meeting Room 12, 409 South Main Street, Harrisonburg, VA**

**Call to Order**

- Roll Call (Board and Consortium)
- Quorum Status (Board and Consortium)

Jeff Stapel  
Tristan Walters

**Approval of Minutes**

- SVWDB Board Meeting Minutes October 13, 2022 (**Board vote required**)
- CEO Consortium Meeting Minutes April 7, July 14, and October 13, 2022 (**Consortium vote required**)

Jeff Stapel

**Committee Reports**

- Executive Committee
  - SVWDB Two-Board Transition Update
  - Board Officer Elections (**Board vote required**)
  - Workforce System Reorganization: New Virginia Workforce Development Agency and Program Reorganization
- Finance Committee
  - November 2022 Budget Comparison
  - Finance Committee Members
  - Financial Leadership Series: Organizational Operations and Financing Impacts Presented by

Jeff Stapel

Jeff Stapel  
Evan Robertson  
Jeff Stapel  
Lori Strumpf

**WIOA Operations**

- Local Workforce Plan Modifications (**Board vote required**)
- One Stop Systems Operator Report
  - Fishersville Center Status
  - Harrisonburg Center Status
- Business Services Report
- Policy Revision: Supportive Services (**Board vote required**)
- Program Waivers for Program Year 2023-2024

Jeff Stapel  
Sharon Johnson  
Lori Strumpf  
Chris Hurley  
Tristan Walters  
Kaystyle Madden  
Tristan Walters  
Sharon Johnson

**Workforce Initiatives**

- Organization Divisions Chart
- Network to Work (N2W) Update
- Skills Academies
- An Employers Perspective

Jeff Stapel  
Sharon Johnson

Randy Doyle

**Other Business**

Jeff Stapel

**Public Input (Rules and Guidelines attached)**

Jeff Stapel

**Adjournment**

Jeff Stapel

***Next Meeting of the SVWDB Board of Directors and Chief Elected Officials Consortium***  
***Thursday, April 20, 2023, 10:00 a.m. – 12:00 p.m., Location TBD***

## **Public Input Rules and Guidelines**

- 1) Citizens desiring to speak during the public input period must sign in on the Public Input Sign-in sheet to provide information which includes printed name, organization (if applicable) and input topic. This will allow for citizens to be recognized by the Chairman of the Board or Consortium during the Public Input period.
- 2) Individuals should stand when recognized by the Chairman of the Board or Consortium; speak their name, organization (if applicable) and input topic.
- 3) Individuals should direct input to the Chairman of the Board or Consortium.
- 4) Individuals are limited to no more than three (3) minutes. The time limit applies per individual and not per topic. Individual input to address multiple topics is limited to five minutes.
- 5) Individuals representing a group of citizens are limited to five (5) minutes; members comprising the group represented forfeit their individual time to speak.
- 6) When there are multiple individuals requesting time for public input on a single topic and the input is the same, at the Chairman of the Board or Consortium's discretion, the number of speakers may be limited in order to make effective use of Board or Consortium member's time and to allow an opportunity for input on multiple topics to be heard by the Board or Consortium.
- 7) All citizens are strongly encouraged to put their comments in writing to the Board or Consortium prior to the meeting for inclusion in the meeting materials. Such written comments should be submitted to the SVWDB office the Monday prior to the Board or Consortium meeting.

**Virginia Career Works – Shenandoah Valley Region is an Equal Opportunity/Program  
Auxiliary aids and services are available upon request to individuals with disabilities**

**TDD: VA Relay Center: 711 or 800.828.1120**

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**Board of Directors and Chief Elected Officials Consortium Meeting  
Thursday, October 13, 2022, 10:00 a.m. – 12:00 p.m.  
Harrisonburg City Hall, Meeting Room 12, 409 South Main Street, Harrisonburg, VA**

**Welcome and Call to Order:** Chair Jeff Stapel welcomed attendees and called the meeting to order at 10:00 a.m. The roll was called and there was not a quorum of the Board or the Consortium. *10.13.2022 Board Roll Call, 10.13.2022 Consortium Roll Call*

**SVWDB Staff Present:** Sharon Johnson, Tristan Walters, Evan Robertson, Kaystyle Madden, Paula Woods

**Guests Present:** Lori Strumpf

**Approval of Minutes:** There was not a quorum present for either the Board or Consortium, therefore the 7.14.2022 Board Minutes and Consortium Minutes were unable to be approved during the meeting. There were no additional comments or discussion of the minutes by the attendees.

**Executive Committee Report:** Chair Jeff Stapel provided an update to the Board regarding the transition activities that have been taking place in order to continue moving forward with the two board structure. A subcommittee consisting of Jeff Stapel, Walt Carter, Robin Sullenberger, Randy Doyle, Sharon Johnson and Lori Strumpf have been continuing to make progress on the transition.

**Finance Committee Report:** Board Finance Director Evan Robertson presented the PY 2022 Budget Comparison to the Board and Consortium members. He also presented the PY 2023 Budget Review for approval. Due to no quorum, neither the Board nor Consortium were able to vote to approve the budget. Evan also provided an update regarding the progress of the annual audit. The Board received an unmodified opinion after the audit, meaning that they did not find anything materially incorrect. Evan also presented a request to transfer funds from the Dislocated Worker program to the Adult program. The request was made to transfer \$100,000 from Dislocated Worker funds to Adult funds because of a higher number of adult enrollments. The Board was unable to vote to approve this request.

**One Stop Operator Report:** One Stop Systems Operator (OSSO) Lori Strumpf presented the OSSO quarterly report to the Board. This report provided an overview of system improvements that have been in progress since the start of her contract in July of 2022, as well as center traffic across the region. A Board Member asked Lori if we still track services being provided for each customer like we did in the past (training provided, etc.). Lori and the Centers Manager, Tristan Walters, responded that although that information can be pulled from WIOA reporting, the OSSO report depicts self-reported information (an individual is stating they are coming in for training services vs. an individual was provided training services).

**Business Services Report:** Employer Network Director Kaystyle Madden provided an overview of Business Services conducted over the course of the previous quarter. This presentation reviewed Employers that have been assisted through the Business Solutions Team, results of an Employer Survey for Employers who have hosted Spotlight Events at the Virginia Career Works Center, and upcoming projects and events (JobStarter, facility tours, etc.)

**Program Performance Update:** CEO Sharon Johnson provided the recent Program Performance metrics for WIOA provided by the VCCS. She reviewed each metric for Adult, Dislocated Worker, and Youth programs with the Board and opened discussion for any questions or concerns. She also explained the different initiatives being utilized by the Board to improve performance metrics moving forward.

**ITA Policy Revision:** Sharon Johnson presented a policy revision to the Board for Individual Training Account (ITA) requirements. Currently, the cap for ITA's is set to \$4,500. Previously, this was enough to cover most requested trainings. Recently, training price increases lead to an increase in the need for individual waivers for training above the allowed cap. These waivers take time for the Coaches and Program Management Team to create and approve, leading to a substantial amount of additional time added to the process. The proposed increase to \$5,800 would reduce the amount of ITA waivers required. The Board was unable to vote on this revision.

**Youth Waiver Review and Approval:** Sharon Johnson presented the proposed Youth Waiver to the Board and Consortium members. Every year the Board is required to request a waiver from the Grant Recipient (Page County) to continue to deliver Youth Services. Sharon presented the final Youth Waiver as well as a Metrics Comparison Chart to the Board for discussion and review. The Board was unable to vote to approve the waiver.

**Addition of Target Industry Sector – Information Technology:** Sharon Johnson recommended that the industry sector IT and Emerging Technologies be added as a Target Industry Sector. This would align with current projected workforce needs in our region, allow the Board to develop and promote initiatives in the sector, and will further align with the GO Virginia Region 8 industry sectors. The Board was unable to vote on this addition.

**Workforce Initiatives:** Sharon Johnson provided an overview of all the projects that the Board has been involved in. Network to Work is continuing to work through a state committee and funds have not been released to the VCCS or to the Board. We are expecting this release at any time. The Board was awarded the Apprenticeship Building America Grant as a partner with Jobs for the Future. This grant will assist in expanding pre-apprenticeships and registered apprenticeships in collaboration with WIOA. The Board has applied for the Workforce Services Investments in Innovation State Grant as well. The Leadership Team with the Board is continuing to work on SkillBuilder Academies for targeted underrepresented populations, including Re-Entry. Sharon is continuing to participate in the Regional Economic Recovery Series hosted by James Madison University.

**Board and Consortium Meeting Schedule:** A tentative schedule for the 2023 Board and Consortium Meetings was presented. No scheduling conflicts were presented. The Board was unable to vote on the schedule.

**Public Comment:** There were no requests for public comment. The meeting adjourned at 12:00 p.m.  
Respectfully Submitted,  
Tristan Walters

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**Board of Directors and Chief Elected Officials Consortium Meeting  
Thursday, July 14, 2022, 10:00 a.m. – 12:00 p.m.  
Harrisonburg City Hall, Council Chambers  
409 South Main Street, Harrisonburg, VA**

**Welcome and Call to Order:** Chair Jeff Stapel welcomed attendees and called the meeting to order at 10:00 a.m. The roll was called and a quorum of both public and private sector board members were present. *Board of Directors Roll Call 7.14.2022.* A quorum of the Consortium was not present. *CEO Consortium Roll Call 7.14.2022.*

**SVWDB Staff Present:** Sharon Johnson, Tristan Walters, Evan Robertson, Monica Long

**Guests Present:** Guest of Way2Go

**Presenters:** Lori Strumpf

Present	Absent	Name	Public/Private
	X	Corey Berkstresser	Private
	X	Cindy Bolan	Private
	X	Andrew T. Breeding	Private
	X	Boyd Brown	Private
X		Steve Burnette	Private
X		Walter Carter	Private
	X	Carolyn Clark	Private
X		Michael Crider	Private
X		Randy Doyle	Private
	X	Lisa Grant	Private
X		Jo Lee Loveland Link	Private
X		Roy Norville	Private
X		Elizabeth Savage	Private
	X	Corey Sheridan	Private
X		Yolanda Shields	Private
X		Jeffrey W. Stapel	Private
X		Robert Huch	Private
X		Mary Staubus	Private
	X	Courtney Thompson	Private
	X	John Albert	Public
	X	Patrick Barker	Public
X		Sharon Baroncelli	Public
X		Jeanian M. Clark	Public
X		Ben Craig	Public
X		Kai Degner	Public

X		John Downey	Public
	X	Howard Feldstein	Public
	X	Kevin Hutton	Public
X		Aline Jackson Diggs for John Jackson	Public
	X	Sharon Hetland	Public
X		Doug Jones for Gary Keener	Public
X		Jay Langston	Public
	X	Jason Miller	Public
X		Katy Parrish	Public
X		Christopher Hurley for Chris Pope	Public
X		Lorne Seay	Public
	X	Celest Williams	Public

Chief Elected Official	Present	Locality
Rebekah Castle		Augusta
Timothy Fitzgerald		Augusta
Pam Carter		Augusta
Ashton Harrison		Bath
Roy Burns		Bath
Kristina Ramsey	x	Buena Vista
Jay Sudder		Buena Vista
William Fitzgerald		Buena Vista
Cathy Seal		Clarke
Bev McKay		Clarke
David Weiss		Clarke
Charles DeHaven, Jr.		Frederick
Brian Shull		Harrisonburg
Sal Romero		Harrisonburg
Roberta Lambert		Highland
Kevin Wagner		Highland
Frank Friedman		Lexington
Jim Halasz		Lexington
Keith Weakley		Page
David McDaniel		Rockbridge
Brandy Flint	x	Rockbridge
Joshua Gooden		Rockingham
Dewey Ritchie		Rockingham
Jenna French	x	Shenandoah
Andrea Oaks	x	Staunton
Ed Daley		Warren
Bobby Henderson		Waynesboro
Greg Hitchin	x	Waynesboro
John David Smith, Jr.		Winchester

Dan Hoffman		Winchester
Jeff Stapel	x	Chair

**Approval of Minutes:** The minutes of the February 24, 2022 and April 7, 2022 Board meetings were approved with no comments or questions. Sharon Baroncelli made the motion to approve and Roy Norville provided a second.

There was no Consortium Quorum to vote on the Consortium minutes from April 7, 2022.

**Executive Committee Report:** Chair Jeff Stapel provided an update to the Board regarding the recently conducted CEO Compensation Study by Strumpf Associates. This study led to a recommendation to the Executive Committee to increase the CEO's salary due to no increase in 5 years and recent accomplishments, to include achieving her PhD., bringing the WIOA programs in-house, and additional funding secured over the past 5 years. This did not require a Board vote and was already approved by the Executive Committee.

**Human Resources and Compensation Policy:** During the discussion of the CEO Compensation study, an additional recommendation was made to adopt a Human Resources and Compensation Policy to provide more structure and guidance and align with current internal procedures. Board Member Kai Degner asked for additional clarification regarding the timeframe listed in the policy for staff reviews, Sharon Johnson explained that the current timeline for internal staff includes a 6-month probationary period review with performance reviews conducted annually. She explained that staff recently received a Cost of Living increase. Without further discussion, Walter Carter made the motion to accept the policy and Yolanda Shields provided the second. The motion passed unanimously.

**Board Officers and New Organization Structure:** After reviewing the current status of the Inc. Board transition, leadership has decided to only vote on the Chair and Emeritus Chair position at this time, until there is more information regarding the roles and responsibilities of the SVWDB Board and the new Inc. Board. Officer roles and responsibilities will be reviewed and discussed throughout the Inc. Board transition process. Jo Lee Loveland Link was nominated for the position of Chair at this time. John Downey made the motion to appoint her as Chair, and Lorne Seay provided the second. After no further discussion, the motion passed unanimously. Jeff Stapel was nominated to serve in the Emeritus Chair role. This will be a one year term with no voting rights. Roy Norville made the recommendation of gathering a consensus of the Board versus an official vote due to the role having no voting rights, however the Board moved forward with an official vote. Kai Degner made the motion to accept Jeff Stapel as the Emeritus Chair for one year. John Downey provided the second. The motion passed unanimously. This discussion was followed by a presentation by Lori Strumpf, which provided an overview of the Inc. Board transition as the new Board structure.

**Finance Committee Report:** Jo Lee Loveland Link introduced Evan Robertson as the new Finance Director and Stephanie Branner as the new General Accountant. She said to expect a new budget presentation in October, and reviewed the current budget as it stands right now. She also provided an update to the Board regarding the Audit RFP. This included the review of the timeline and an expected audit completion date by November 1. The completed audit will then be submitted to our Grant Recipient, Page County.

**Audit Procurement Discussion and Award:** In order for the Board to discuss and award the Audit RFP, the motion was made to move to closed session. Kai Degner made the motion to move to closed session, Doug Jones provided the second. The motion passed unanimously. Staff members Evan Robertson, Monica Long, Sharon Johnson, and Tristan Walters were invited to stay.

*We are following closed meeting procedures in accordance with § 2.2-3712 Code of Virginia, which is called for the purpose of "Discussion of the award of a public contract involving the expenditure of public funds, including interviews of bidders or offerors, and discussion of the terms or scope of such contract, where discussion in an open session would adversely affect the bargaining position or negotiating strategy of the public body." in accordance with § 2.2-3711 (A) (29) Code of Virginia.*

*Return to Open Session: John Downey Moved that the Board come out of closed session. Sharon Baroncelli provided the second and the vote passed unanimously.*

Elizabeth Savage made the motion to give the evaluation team the authority to conduct interviews and, based on that scoring, enter into negotiations, select a contract, and move forward with the audit. Jeanian Clark provided the second and the motion passed unanimously.

**Future Finance Evolution and Resource Development:** There will be future discussions regarding funding and resource development. The Board is in agreement that additional funding is needed to expand quality programming and to fill funding gaps that WIOA funding does not address. The SVWDB will work as a community convener for grant opportunities and to support partners pursuing grant funding. The SVWDB is eager to expand partnerships and support partner initiatives and not replace or duplicate regional workforce efforts.

**Statement of Economic Interest Requirement:** It is the responsibility of Board Members to annually disclose a statement of economic interest. Previously this was a complex process. This year we are hoping to streamline it by utilizing the provided form (displayed). This is a WIOA-mandated process, but previously the locality was given the option to determine the format used for SVWDB statement of economic interest, which resulted in numerous different forms with varying degrees of information. The SVWDB will be standardizing the form and providing it to members for completion.

**WIOA Operations:** The OSSO contract with Strumpf Associates started as of July 1, 2022. Lori Strumpf started her contract by accompanying Sharon Johnson on unannounced visits to each of the centers to see each Center in an unaltered state and to meet staff. This conversation lead to the SVWDB creating a directive that states all area workforce centers must be fully open, with doors unlocked and staff available to assist walk-ins. This directive required Board approval. Jeff Stapel made the motion to accept the directive as presented. Sharon Baroncelli provided the second and the motion passed unanimously.

The Adult and Dislocated Worker Program Waiver for program year 2022 has been approved. The SVWDB received notice on June 30<sup>th</sup> that, effective July 1<sup>st</sup>, we may continue operating the programs. The state will require that the SVWDB meet negotiated performance metrics, increase enrollments and meet the 40% training requirement.

**Workforce Initiatives:** The SVWDB has been awarded \$500,000/year over the course of two years to support the implementation of Network2Work. This program will run alongside WIOA but will not be an integrated WIOA service. The goal will be to utilize Network2Work to reach the remote areas of the service region and to assist job seekers with few barriers to employment but no social networks. Job seekers identified with numerous barriers to employment will be referred to WIOA services. The SVWDB budget has been submitted to the VCCS, and the VCCS has submitted it to a committee of state officials. We are currently awaiting results from the committee and then the funding will be managed and distributed by the VCCS and be released to the awardees.

The SVWDB was also one of the partners awarded the Apprenticeship Building America Grant. The grant recipient was JFF, and as a partner, the SVWDB will be receiving \$300,000 to support staffing responsible for integrating registered apprenticeships into WIOA programming.



The SVWDB is also currently participating in the Job Starter program with Blue Ridge Community College. We are hoping to continue to expand this model into an opportunity in manufacturing for re-entry citizens.

Kaystyle Madden with the SVWDB is working with Sarah Morton (Executive Director of Area 2) to pilot the Career Pathways Employer Guide program in our region. We are currently working to secure funding to sustain the project.

Sharon Johnson has been participating in the Regional Economic Recovery Series (RERS), hosted by James Madison University. The RERS initiative consists of four working groups to address childcare, housing, transportation and workforce. She will be presenting as part of a workforce panel at the annual RERS session on August 23, 2022. A separate workforce only session will be scheduled for late fall 2022.

**Public Comment:** There were no requests for public comment. The meeting adjourned at 12:00 p.m.  
Respectfully Submitted,  
Tristan Walters

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**Board of Directors and Chief Elected Officials Consortium Meeting**  
**Thursday, April 7, 2022, 10:00 a.m. – 12:00 p.m.**  
**Harrisonburg City Hall, Council Chambers**  
**409 South Main Street, Harrisonburg, VA**

**Welcome and Call to Order:** Chair Jeff Stapel welcomed attendees and called the meeting to order at 10:00 a.m. The roll was called and there was a quorum of the public sector, but no quorum for the private sector board members. For details, see *Board of Directors Roll Call 4.7.2022*. Afterward, the Consortium roll was called. A quorum of the Consortium was present. For details, see *CEO Consortium Roll Call 4.7.2022*

**SVWDB Staff Present:** Sharon Johnson, Tristan Walters, Loretta Snow, Evan Robertson, Monica Long  
**Guests Present:** Nehemias Velez, Lisa Grant  
**Presenters:** Lori Strumpf, Strumpf Associates

**Approval of Minutes:** The minutes of the February 24 Board meeting were not approved because there was not a quorum. They will be included in the July meeting for approval.

The minutes of the February 24 CEO Consortium meeting were approved. Greg Hitchen made the motion, second by Josh Gooden. The motion passed unanimously.

**Committee Reports:**

*Executive Committee:* The Executive Committee is the entity responsible for nominating officers. Chair Jeff Stapel presented a slate of new officers to the Board of Directors and the CEO Consortium for discussion and approval. Due to the lack of a quorum of the Board, there was no vote. At the request of the Chair, the Executive Committee will not vote on the new nominations and will reintroduce them at the July meeting.

*Finance Committee:* Finance Chair Jo Lee Loveland Link presented a review of the budget. There has been no substantive change in the budget comparison since the last presentation. Staff turnover has led to a reduction in staff cost. The Network to Work initiative funding is uncertain and dependent on General Assembly approval. Chair Loveland Link explained that Joe Kennedy is currently at home recovering from injuries from a car accident, but has provided his direct contact information, per his request, in case anyone has additional finance questions. The board was unable to vote on the transfer of program funds or company credit cards due to the lack of a quorum. Those items will be addressed during the Executive Committee meeting. Workforce Consultant Lori Strumpf presented to the Board and CEO Consortium the first of four sessions in the Financial Leadership training series.

**Workforce Survey:** Greg Hitchin with Waynesboro City Economic Development presented and distributed a brief survey to Board Members and guests at the meeting. The survey questions addressed the prioritization of workforce challenges as identified throughout the regional workforce system.

**Workforce Challenge Perspectives:** Board Member Dr. John Downey, President BRCC, presented a summary of a recent Emsi report, *The Demographic Drought: How the Approaching Sandemic Will Transform the Labor Market for the Rest of Our Lives*. The report discusses the people shortage that is

affecting workforce and higher education and will only worsen in the coming decades. The report indicated that the key factors contributing to low workforce participation included a declining population and a large segment of the workforce being affected by addiction. Dr. Downey discussed how Blue Ridge Community College is also feeling the effects of low workforce participation with lower full-time enrollments than in previous years. He stated that immigration would only be a temporary fix to a bigger problem, challenged board members to brainstorm solutions, and mentioned training programs geared toward those exiting substance abuse programs could be a potential solution. The entire report can be accessed at the following link:

[https://www.economicmodeling.com/wpcontent/uploads/2022/03/DD\\_2\\_Bridging\\_The\\_Gap\\_Final.pdf](https://www.economicmodeling.com/wpcontent/uploads/2022/03/DD_2_Bridging_The_Gap_Final.pdf)

**Other Business:** Dr. Sharon Johnson and the members of the Board thanked Chair Jeff Stapel for his 20+ years of service and Executive Committee and Board Member Robin Sullenberger for 30+ years of service on the Board. Their terms end June 30, 2022.

**Public Comment:** There were no requests for public comment. The meeting adjourned at 12:15 p.m.  
Respectfully Submitted,  
Tristan Walters

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COMMONWEALTH OF VIRGINIA

# WORKFORCE DEVELOPMENT OPTIMIZATION INITIATIVE

REIMAGINING HOW WE SKILL OUR WORKFORCE

CONSOLIDATE ● OPTIMIZE ● CENTRALIZE ● STANDARDIZE ● UNIFY

**BRYAN SLATER**  
**SECRETARY OF LABOR**

# THE PROBLEM

Many agencies across the Commonwealth are responsible for workforce development activities, but **no one agency has it as their #1 priority.**

## WORKFORCE DEVELOPMENT IN VIRGINIA



**\$485M+**  
Total Funding



**12+**  
Agencies



**6**  
Secretariats



**Fragmented, decentralized approach that prevents efficient coordination and administration**



**Lack of connection between industry demand and talent capabilities**



**Disparate and confusing entry points**



**Lack of consistent or reliable data for measuring workforce development program outcomes**



**Redundant, outdated, and siloed technology systems**



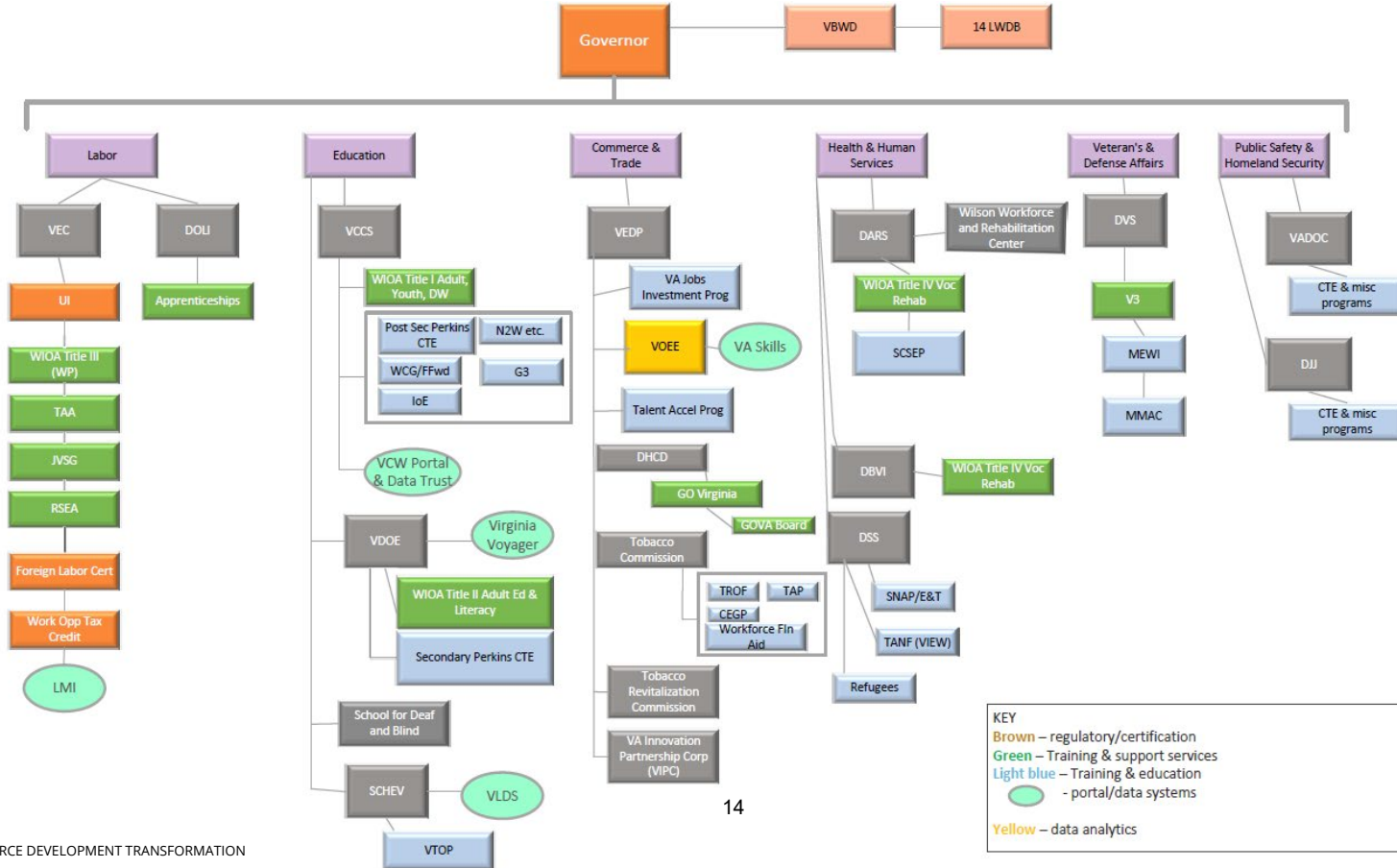
120K fewer Virginians in the Commonwealth's labor force compared to pre-pandemic levels, with a labor force participation rate of **63.6%**<sup>1</sup>

**50%**<sup>2</sup> of Virginia small businesses are struggling to find workers

<sup>1</sup><https://www.vec.virginia.gov/latest-release>

<sup>2</sup>[https://www.thecentersquare.com/virginia/about-half-of-virginia-small-businesses-still-struggling-to-find-workers/article\\_909e0012-d2f8-11e3-afde8e37fbee0c0b2.html#:~:text=In%20the%20nationwide%20survey%2C%2063,percentage%20points%20better%20than%20average.](https://www.thecentersquare.com/virginia/about-half-of-virginia-small-businesses-still-struggling-to-find-workers/article_909e0012-d2f8-11e3-afde8e37fbee0c0b2.html#:~:text=In%20the%20nationwide%20survey%2C%2063,percentage%20points%20better%20than%20average.)

# THE CURRENT STATE OF WORKFORCE DEVELOPMENT



# THE OPPORTUNITY

A **single, dynamic, nation-leading workforce ecosystem hub** that proactively connects talent capabilities across all Commonwealth sectors and regions with industry demand. The aligned workforce development system will effectively **streamline capabilities** and resources with one goal in mind: a **transformed and transformational system that works for ALL Virginians**.



**Balance centralized strategy with regional flexibility** by eliminating duplicative programs and processes across the Commonwealth, while providing adaptable guidelines that allow regions to address their unique worker and employer needs.



**Standardize goals, metrics, performance incentives, and Key Performance Indicators (KPIs)** to drive accountability and enable meaningful outcomes that encourage improved service delivery.



**Design a centralized hub to streamline workforce policy and for efficiently gathering, analyzing and sharing data** between workforce development programs, while providing insights to inform policy and empower a long-term and best-in-class data and analytics strategy that prioritizes responsiveness and meaningful decision-making.

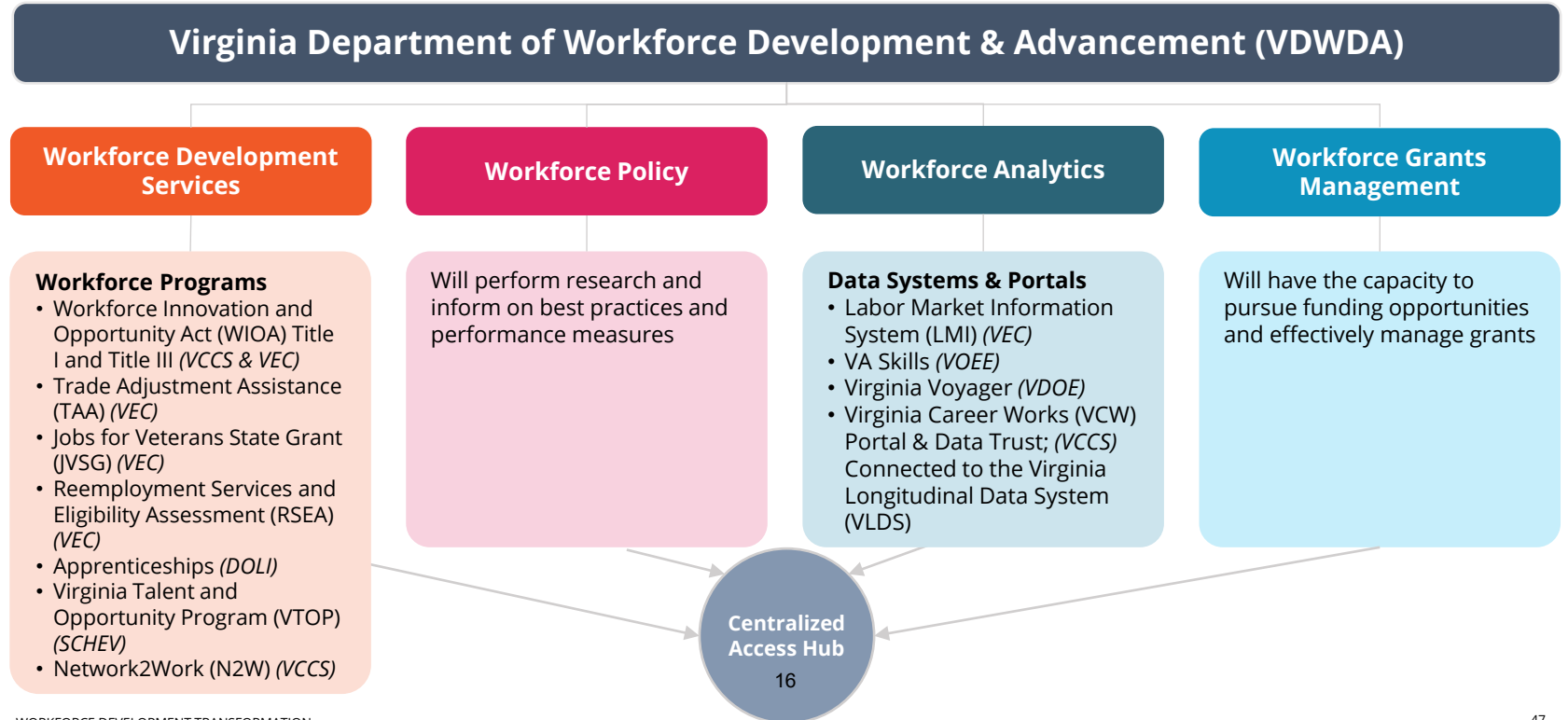


**Create a centralized website portal for service seekers** that enables them to easily access information, receive opportunities, and connect to employers and job seekers

**AFTER THE INITIAL INVESTMENT IN WORKFORCE DEVELOPMENT OPTIMIZATION, CONSOLIDATION AND OTHER EFFICIENCIES WILL RESULT IN MEASURES TO <sup>15</sup>TARGET, EXPAND, AND SCALE TO SUCCESS.**

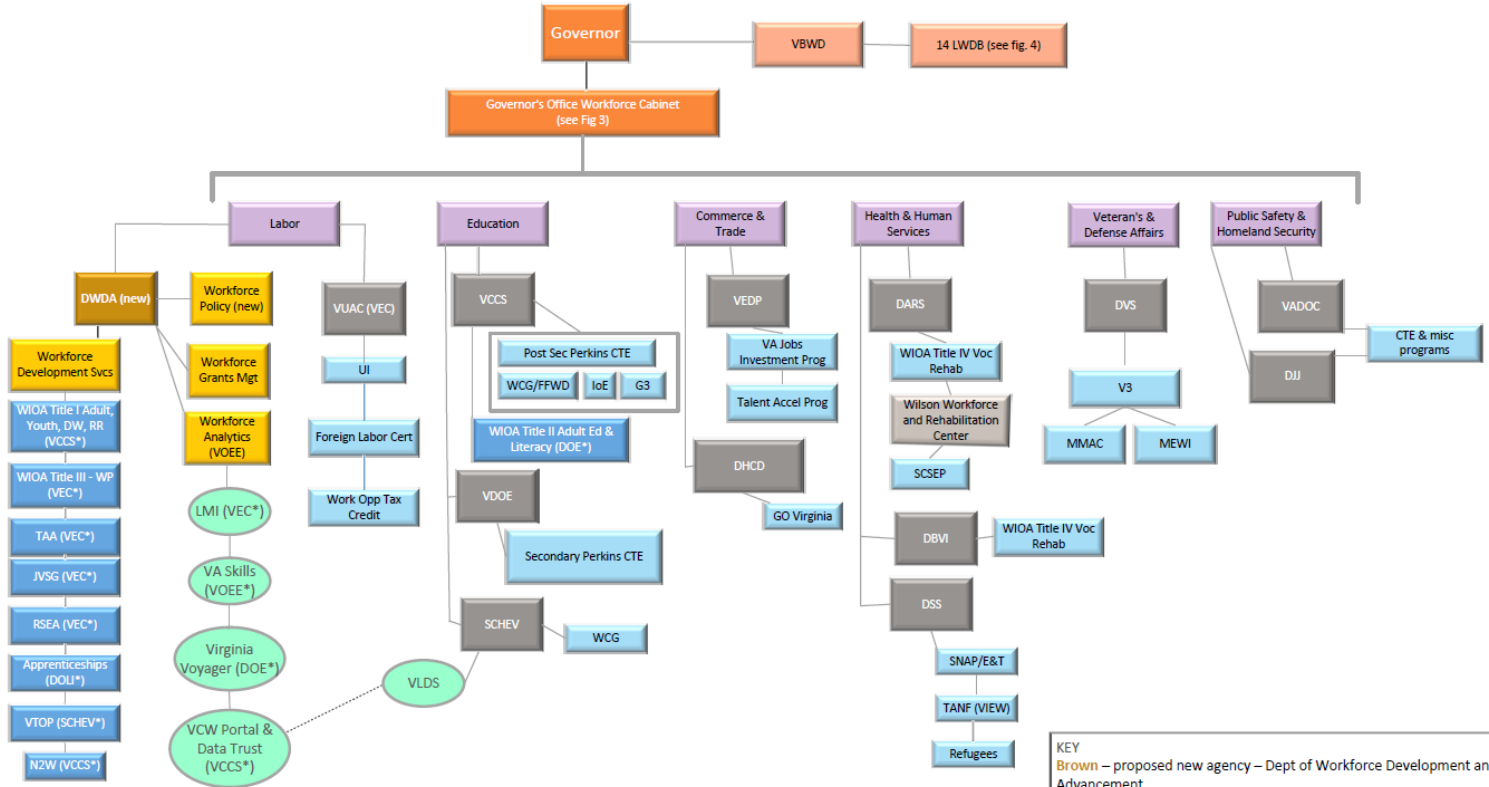
# THE NEW ORGANIZATIONAL STRUCTURE

We propose the following structure for the VDWD, moving offices and teams that have a similar mission to VDWD under one umbrella department.





# THE FUTURE STATE OF WORKFORCE DEVELOPMENT



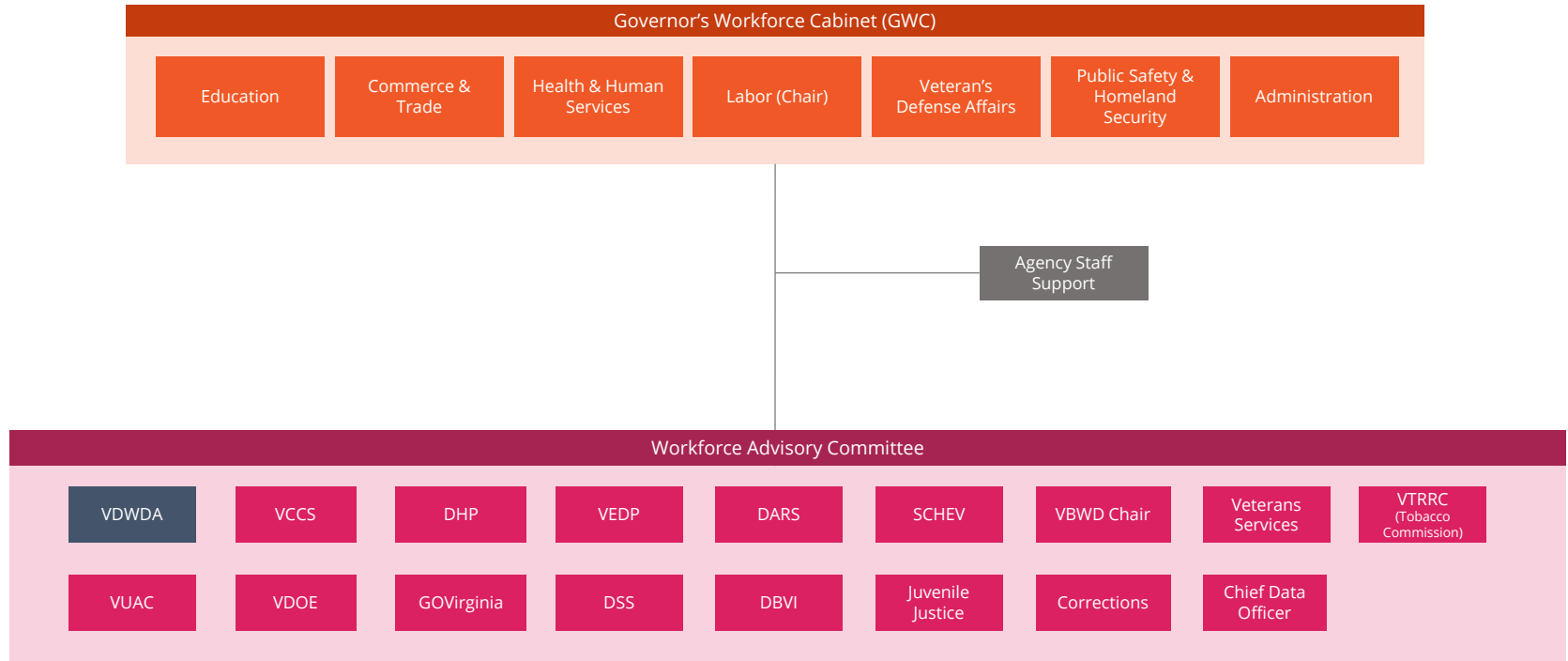
\* - designates agency currently administering program

17  
 This diagram represents agencies with programs that are directly engaged in providing workforce development services (6 Secretaries, 13 agencies).

**KEY**  
 Brown – proposed new agency – Dept of Workforce Development and Advancement  
 Yellow – new division within DWDA  
 Blue – Workforce development programs transferring from current agencies  
 Light blue – workforce development related programs not transferring  
 Green oval – portal/data systems

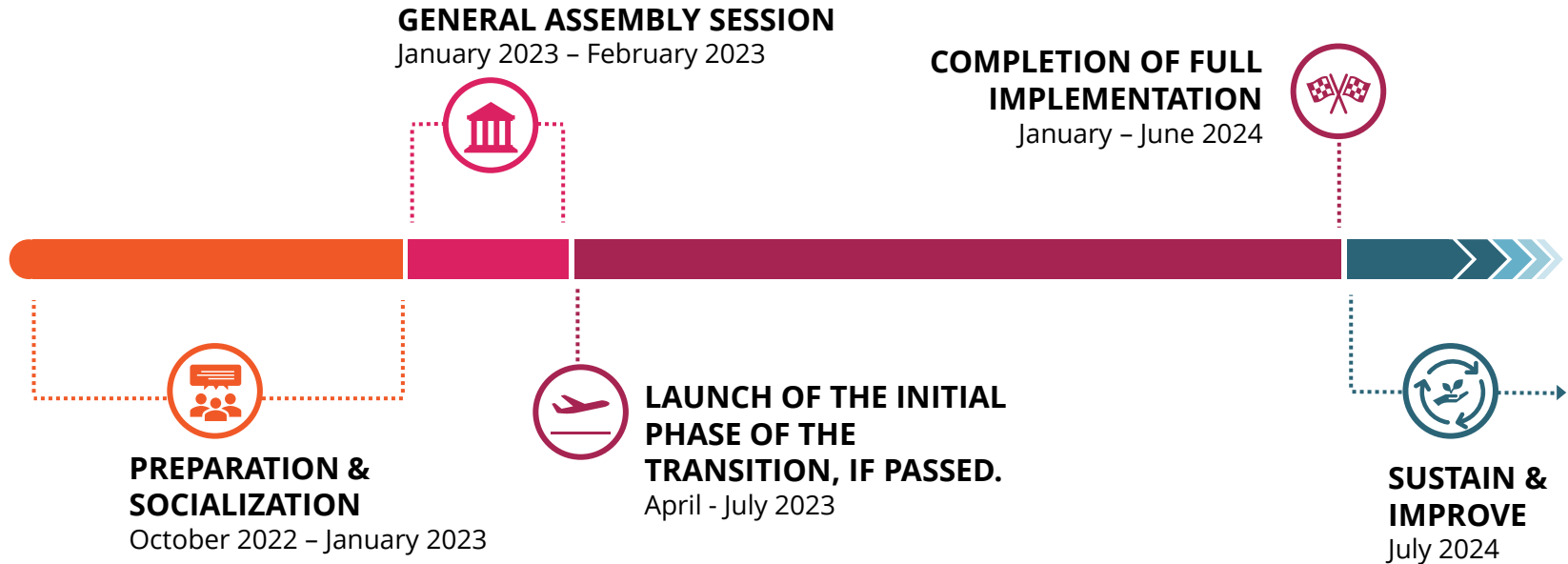
# THE GOVERNOR'S WORKFORCE CABINET

The proposed governance structure of the Governor's Workforce Cabinet.



# TRANSITION TIMELINE

Our initiative extends across the next two years and features several key milestones.



**Shenandoah Valley Workforce Development Board, Inc.**  
**Summary Budget Comparison**  
**For the 5 Months Ended November 30, 2022**

	Budget	Actual	\$ Variance	% Variance
<b>Revenue</b>				
Workforce Innovation and Opportunity Act	753,214.11	719,621.79	(33,592.32)	-4%
AJC Security Grant	64,374.73	52,515.34	(11,859.39)	-18%
Apprenticeship Building America Grant	22,106.40	-	(22,106.40)	-100%
Workforce Innovation Grant	11,750.00	-	(11,750.00)	-100%
<b>Total Revenues</b>	<b>851,445.24</b>	<b>772,137.13</b>	<b>(79,308.11)</b>	<b>-9%</b>
<b>Expenses</b>				
Personnel Expenses	425,153.79	382,186.91	42,966.88	10%
Operating Expenses	205,041.45	154,446.82	50,594.63	25%
Direct Client Services	221,250.00	211,229.17	10,020.83	5%
<b>Total Expenses</b>	<b>851,445.24</b>	<b>747,862.90</b>	<b>103,582.34</b>	<b>12%</b>

**Notes:**

WIOA Budgeted Revenue - \$1,800,000.

AJC Security Grant Budgeted Revenue - \$77,000.

ABA Grant Budgeted Revenue - \$74,000.

WIG Grant Budgeted Revenue - \$94,000.

Personnel Budgeted Expenses - \$1,228,000. Budgeted for 12 employees as of Nov. & we currently have 11 on staff.

Operating Budgeted Expenses - \$590,000. Primarily costs to operate 3 Workforce Centers & to support WIOA staff.

Direct Client Service Budgeted Expenses - \$613,000. This includes Tuition, WEX, OJT, & Supportive Services.



# ORGANIZATIONAL OPERATIONS AND FINANCING IMPACTS

PRESENTED TO THE SVWDB

1.19.23

A 4-Part Training Series

By: Lori Strumpf, President  
Strumpf Associates

## PURPOSE OF THIS SERIES

**TO ADD VALUE TO BOARD MEMBERS  
KNOWLEDGE**

**CREATE A COMMON UNDERSTANDING  
OF SHARED RESPONSIBILITIES**

**ONGOING PROFESSIONAL  
DEVELOPMENT OF BOARD MEMBERS**

**SERIES TOPICS INCLUDE:**

- ETHICAL RESPONSIBILITIES
- RESOURCE DEVELOPMENT
- STRATEGIC BUDGETING
- ORGANIZATIONAL OPERATIONS AND FINANCIAL IMPLICATIONS

# *ORGANIZATIONAL OPERATIONS AND FINANCING IMPACTS*

## Key Point: 3 Essential Practices

- Practices essential to a nonprofit organization's ability to be financially strong and effective:
  - 1. Understanding the true costs of all programs to develop accurate, realistic budgets;
  - 2. Monitoring the financial status of individual programs and the organization as a whole on an ongoing basis; and
  - 3. Meeting expenses in a timely manner.

# FINANCIAL OPERATIONAL FACTORS

- Effective nonprofit financial management is necessary to ensure the organization is financially healthy enough to pursue the mission and take on additional growth opportunities.
- A budget isn't a prediction, a forecast, a target or a wish list. A nonprofit budget is a financial document that provides an overview of how the organization plans to spend its money. There are two parts to the budget – expenses and revenue. It's crucial that the budget be centered around the primary goals and objectives of the organization.
- Nonprofit budgets should be constructed around the organization's programs and activities, which will help's the organization stay focused on the strategic goals.

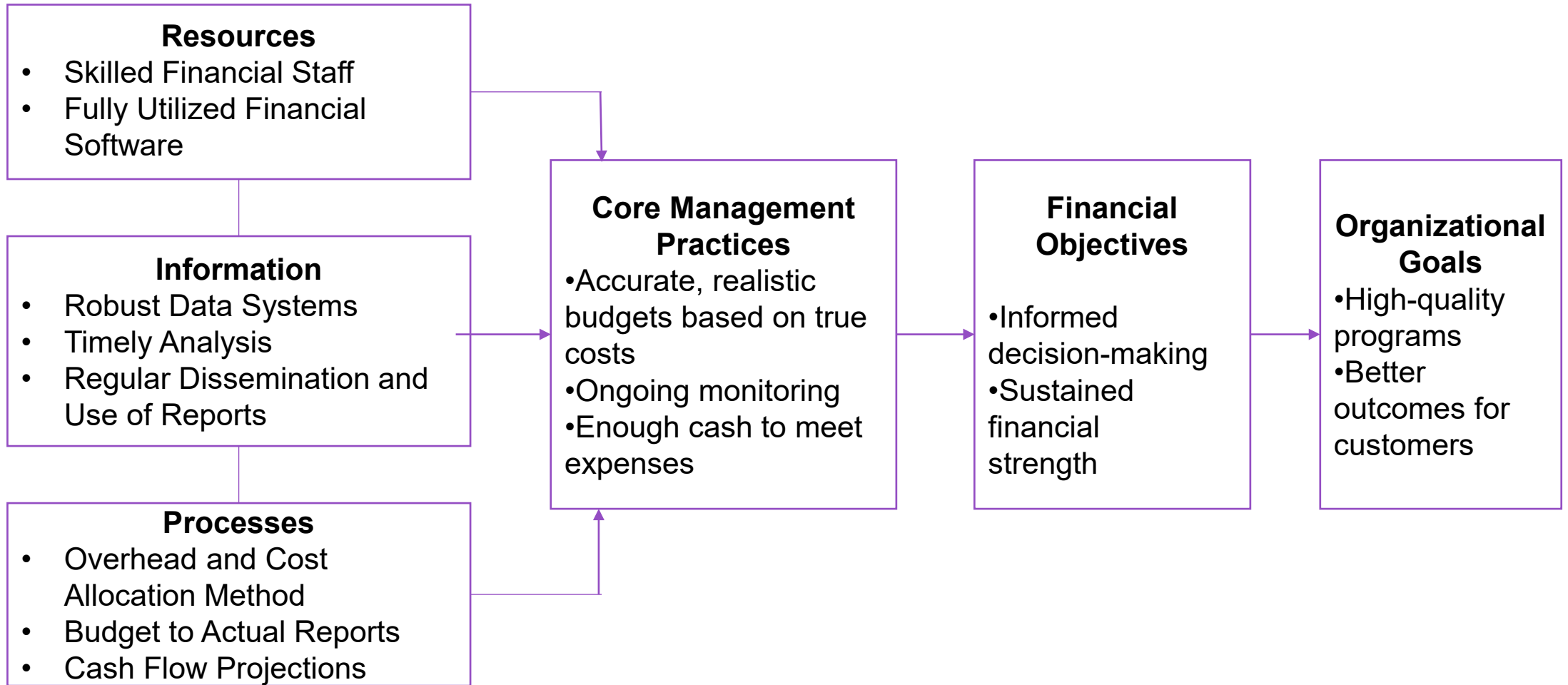


# IMPLEMENTING THESE KEY PRACTICES

## An organization needs:

1. Strong financial management resources, both human and material;
2. Procedures and methodologies to generate key indicators of its financial status, account for overhead costs and alert staff about available cash as well as shortfalls; and
3. Systems to effectively communicate financial information among financial and nonfinancial staff.

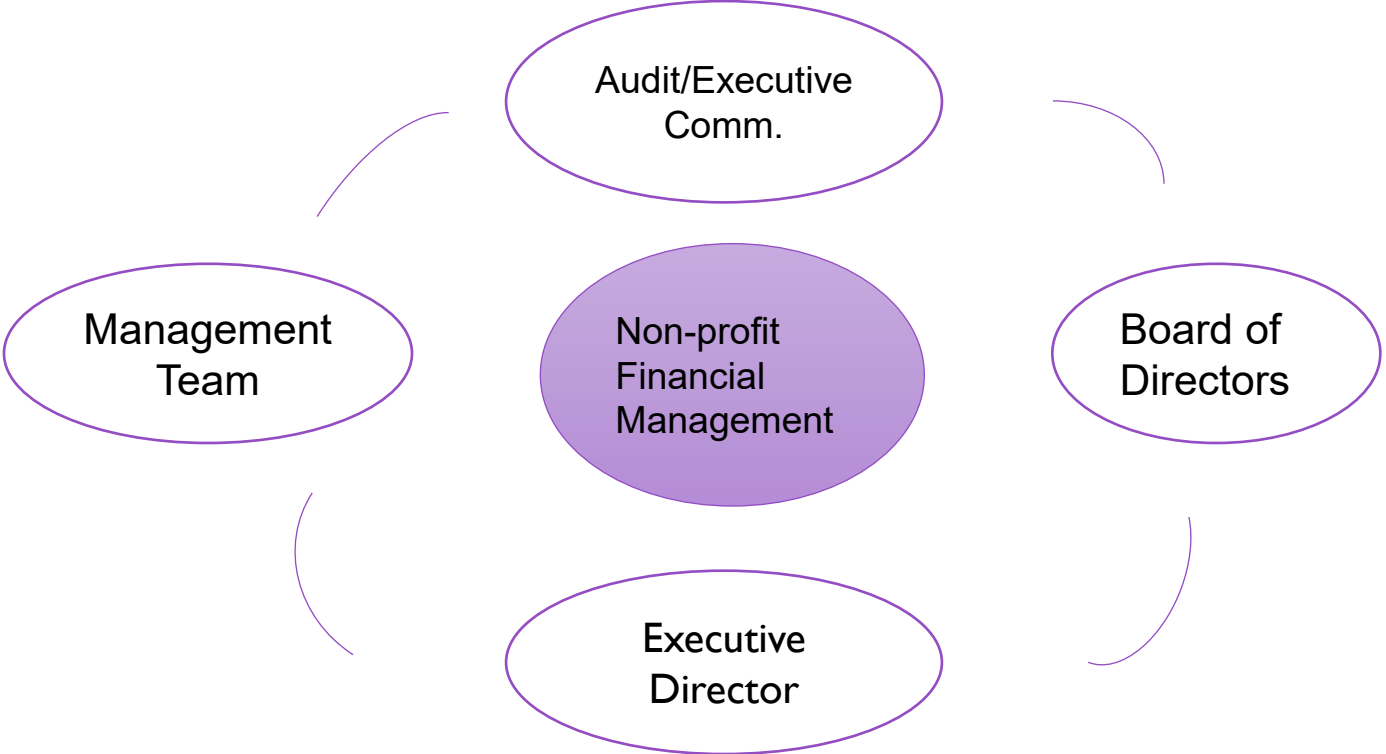
# Components of an Effective Financial Management Structure



# RESPONSIBILITIES FOR GOOD OPERATIONS AND FINANCIAL MANAGEMENT

*Distinguishing board and staff responsibilities in an expanding and complex organization.*

There is no one person responsible for financial management and reporting in a nonprofit organization. But different individuals and groups have important and specific roles when it comes to nonprofit financial management.



AUDIT OR  
EXECUTIVE  
COMMITTEE  
FINANCIAL  
RESPONSIBILITIES

- Oversight of overall financial reporting process
- Selection and review of external auditors
- Review and approval of the annual audit Form 990
- Monitoring actual performance against the budget

# BOARD OF DIRECTORS

## FINANCIAL RESPONSIBILITIES

- Oversight of Executive Director
- Review/approval of the annual audit and Form 990
- Review and monitor the budget

*Questions that Board members should ask include:*

- Do we have enough cash inflows to cover operations, or are we living off reserves?
- Do we have enough cash on hand to cover at least three months of operating expenses?
- What portion of our funds are being spent on program activities?
- Are we relying on one or two major sources of funding?
- How much does it really cost for us to raise money?
- How much are we spending on administrative expenses?

## EXECUTIVE DIRECTOR FINANCIAL RESPONSIBILITIES

- Oversight of day-to-day operations
- Face of the organization
- Liaison to the board and the rest of the organization
- Review and communicate internally about the budget
- Monitoring spending and funding requirements

# MANAGEMENT FINANCIAL RESPONSIBILITIES TEAM

- Review and provide input on budget
- Communicate financial information to Executive Director

# 5 COMMON FINANCIAL PLANNING CHALLENGES OF NONPROFIT ORGANIZATIONS

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## **#1: Lack of Financial Education**

Without proper financial education, leaders may not understand how to read a financial statement, manage the accounting process, or create a budget.

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## **#2: Lack of Time**

Developing a plan and a strategy to sustain the organization over the long-term requires an investment of time and effort.

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## **#3: Instability**

It is difficult to create a plan when there is a lack of stability in the resources available. Revenue cycles may change drastically, making it difficult to create long-term goals. Managers need to be on a constant lookout for new funding sources. This effort means looking into available grants, which takes grant writing skills and managing expenses.

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## **#4: Grant Process is Burdensome**

The federal government and other potential funders offer grants. They require a nonprofit to submit documentation and other data to receive the funding. This documentation may be difficult to create, time consuming, and the process may be hard to manage.

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## **#5: Limited Oversight**

Related to lack of time or engagement of the board. However, addressing planning limitations may improve the financial stability of an organization.

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## TIPS AND BEST PRACTICES FOR BUDGETING

- Consider budgets as living documents and review them in light of all financial activities.
- Be sure to include grants, contracts, and agreements in the budget to help you plan for them.
- Be realistic when setting financial goals. Don't include a major grant if chances of getting it is slim-to-none.
- Consider fixed and necessary costs first before adding items from the organizations "wants list."
- Set the budget before the end of the fiscal year and schedule a board meeting to approve it.
- Account for inflation and any unusual circumstances (e.g., an anticipated reduction in allocations).
- Make allowances for inconsistencies related to timing (e.g., federal grant years may differ from other funders fiscal years).

# CURRENT PRACTICES AND PROCEDURES

## *CURRENT DOCUMENTATION*

- Internal Controls Transaction Cycle Walkthroughs Fiscal Year 2022
- SVWDB Fiscal Policies and Procedures Manual

## *ONGOING IMPROVEMENT PROCESS*

- A review of these documents is underway by staff with support from Strumpf. This review will examine any areas that may need to be strengthened.

# ACCOUNTING CONTROLS

- Accounting controls are the procedure used to safeguard the organization's assets.
- Proper accounting controls also provide reliable and accurate financial records.
- Both of these goals enable the board and senior management to monitor the organization's financial operations.
- The creation of adequate accounting controls should focus on four areas: **authority and approval, proper documentation, physical security, and early detection.**
- **Authority and approval procedures** require the identification of who has the authority to perform and approve certain transactions, such as approving invoices, expense accounts, signing checks, and dispensing supplies.
- **Proper documentation** is a part of the approval and authority process, in that every financial transaction should leave a "paper trail."
- **Physical security** addresses limiting access to various physical assets (accounting records, personnel files, merchandise, supplies, and other equipment).
- If the proper controls are in place, the systems should alert someone to possible fraud. Everyone must follow the established procedures for the controls to work. Any deviation from the system will enable someone to defraud the organization successfully. **Early detection** and good risk management may prevent a financial loss.

## FINAL THOUGHTS AND COMMENTS

- The best way to ensure the organization's financial sustainability is to have a solid plan in place, backed by a board in addition to fully engaged leadership with the necessary complement of skills.

# ABOUT YOUR TRAINER

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Lori Strumpf has over 30 years in the field of organizational development and change management in human services and workforce development organizations. Lori has been in business as **Strumpf Associates: Center for Strategic Change** for the last 25 years. She is a nationally known expert in organizational management, training and design for education, training, and human resource development systems.

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Prior to starting her business, Lori was the Assistant Director for the National Association of Private Industry Councils. She has been Chair of the Legislative and Public Policy Task Force for the National Youth Employment Coalition and was a founding member. She was a Senior Associate at Brandeis University, Center for Human Resources, Heller School for Public Policy. Prior to moving to Washington, D.C. to work on the Vice President's Task Force for Youth Employment, Lori was the Assistant Director to a project for court diverted delinquent youth. She also worked at Florida State Prison, counseling prisoners.

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Strumpf Associates is a small cadre of training and consulting experts, headquartered in Washington, DC. The Principals in Strumpf Associates have decades of experience helping organizations manage change, build systems, build leadership teams, and improve program quality and customer satisfaction. The Center provides organizational change management consulting and executive coaching to schools, workforce organizations, and welfare organizations. Strumpf has assisted with the design and implementation of over 150 one stop career centers nationwide.

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Lori Strumpf has a Masters and Specialist Degree in Educational Counseling from the University of Florida.

## Local Plan Modification Checklist

### Section 1 Workforce and Economic Analysis

Criteria	Comments	Reviewed and determined No Modification Required	Reviewed and Modification Made
1.1 A descriptive analysis of the regional economic conditions, including existing and emerging in-demand industry sectors and occupations; and the employment needs of employers in those industry sectors and occupations	Modify plan to reflect any <u>significant</u> changes in local economic conditions.	No significant Changes	Updated to show the most current numbers for the region's economy with slight increases
1.2 A descriptive analysis of the knowledge and skills required to meet the employment needs of the employers in the local area, including employment requirements for in-demand industry sectors and occupations.	As needed	No significant Changes	
1.3 An analysis of the local workforce, including current labor force employment (and unemployment) data, information on labor market trends, and the educational and skill levels of the workforce in the region, including individuals with barriers to employment.	Modify plan to reflect any <u>significant</u> changes in the labor market.	No significant Changes	
1.4 An analysis of the workforce development activities (including education and training) in the region to address the identified education and skill needs of the workforce and the employment needs of employers in the region	As needed	No significant Changes	
1.5 An analysis of the strengths and weaknesses of the workforce development activities identified in 1.4 and the capacity to provide these services	As needed	No significant Changes	Changed the language slightly as N2W has not been implemented but will be soon.
1.6 Describe and assess the type and availability of youth workforce investment activities in the local area including activities for youth with disabilities, which must include an identification of successful models of such activities.	As needed	No significant Changes	Updated list of program elements; one was missing. Added N2W back in and tweaked the language for what's coming
1.7 Describe and assess the type and availability of adult and dislocated worker employment and training activities in the local area	As needed	No significant Changes	Removed mention of N2W and technical

			skills training from a listing of follow-up services for AD/DW
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## Section 2 Strategic Vision and Goals

Criteria	Modifications Required	Reviewed and determined No Modification Required	Reviewed and Modification Made
2.1 Describe the local board's strategic vision and goals for preparing an educated and skilled workforce (including youth and individuals with barriers to employment). The goals should relate to the performance accountability measures based on primary indicators of performance	As needed	No significant Changes	
2.2 Describe how the local board's strategic vision and goals will support the strategies identified in the Virginia Combined State Plan	Modify to reflect revised goals in State Plan	Modify	Removed combined state plan goals from 2020 and added new goals from 2022. Deleted comparison table for goals. Instead of addressing the CSP goals directly, I just created a narrative including the goals of the state plan. Added language about the WIG and ABA grants
2.3 Describe how the local board's vision and goals align with and/or supports the vision of the Virginia Board of Workforce Development (VBWD)	Modify to reflect changes in revision to State's Vision	No significant Changes Needed	It still fits
2.4 Taking into account the analyses described in 1.1 through 2.3, describe a strategy to work with the entities that carry out the core programs and required partners to align resources available to the local areas to achieve the local board's strategic vision and goals.	As needed	No modification	

<p>2.5 Describe the local board strategic plan designed to combine public and private resources to support sector strategies, career pathways, and career readiness skills development. Such initiatives shall include or address:</p> <ul style="list-style-type: none"> <li>• Regional vision for workforce development</li> <li>• Protocols for planning workforce strategies that anticipate industry needs</li> <li>• Needs of incumbent and underemployed workers in the region</li> <li>• Development of partners and guidelines for various forms of on-the-job training, such as registered apprenticeships</li> <li>• Setting of standards and metrics for operational delivery</li> <li>• Alignment of monetary and other resources, including private funds and in-kind contributions, to support the workforce development system</li> <li>• Generation of new sources of funding to support workforce development in the region</li> </ul>	<p>Modify if there were changes in the financing available to support WIOA Title I and partner-provided WIOA Services</p>	<p>No significant Changes</p>	<p>Removed language regarding the pandemic.</p>
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### Section 3 Local Area Partnerships and Investment Strategies

Criteria	Modifications Required	Reviewed and determined No Modification Required	Reviewed and Modification Made
<p>3.1 Provide a description of the workforce development system in the local area that identifies:</p> <ul style="list-style-type: none"> <li>• The programs that are included in that system</li> <li>• How the local board will work with the entities carrying out core programs and other workforce development programs to support alignment to provide services, including programs of study authorized under the Carl D. Perkins Career and Technical Education Act of 2006</li> <li>• How the local board coordinates and interacts with Chief Elected Officials (CEO)</li> </ul>	<p>Modify if there were changes to the Local WDB structure</p>	<p>No modification</p>	
<p>3.2 Describe strategies and services that will be used in the local area to:</p> <ul style="list-style-type: none"> <li>• Facilitate engagement of employers, including small employers and employers in in-demand sectors and occupations, in workforce development programs</li> <li>• Support a local workforce development system that meets the needs of businesses in the local area</li> <li>• Better coordinate workforce development programs and economic development</li> <li>• Strengthen linkages between the one-stop delivery system and unemployment insurance programs</li> </ul>	<p>As needed</p>	<p>No modification</p>	
<p>3.3 Describe how the local board will coordinate workforce investment activities carried out in the local area with economic development activities carried out in the region in which the local area is located (or planning region), and promote entrepreneurial skills training and microenterprise services.</p>	<p>As needed</p>	<p>No modification</p>	



3.4 Describe how the local board coordinates education and workforce investment activities with relevant secondary and postsecondary education programs and activities to coordinate strategies, enhance services, and avoid duplication of services.	As needed	No modification	Tweaked N2W language
3.5 Describe how the local board will collaborate on local workforce investment activities with the community colleges in their area in the planning and delivery of workforce and training services.	As needed	No modification	
3.6 Describe how the local board will coordinate workforce investment activities in the local area with the provision of transportation, including public transportation, and other appropriate supportive services in the local area.	As needed	No modification	
3.7 Describe the plans and strategies for, and assurances concerning, maximizing coordination of services provided by the State employment service under the Wagner-Peyser Act and services provided in the local area through the one-stop delivery system, to improve service delivery and avoid duplication of services.	As needed	No modification	
3.8 Describe how the local board will coordinate workforce investment activities in the local area with the provision of adult education and literacy activities, including a description of how the local board will carry out the review of local applications.	As needed	No modification	
3.9 Describe how the local plan shall: <ul style="list-style-type: none"> <li>Specify the policies and protocols to be followed by all the region’s workforce development entities when engaging the region’s employers</li> <li>Address how the region’s workforce entities will involve employers in the formation of new workforce development activities</li> </ul> Identify what activities will be undertaken to address employers’ specific workforce needs	As needed	No modification	
3.10 Describe how the direction given by the Governor and the local board to the one-stop operator to ensure priority for adult career and training services will be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient.	As needed	No modification	

#### Section 4 Program Design and Evaluation

Criteria	Modifications Required	Reviewed and determined No Modification Required	Reviewed and Modification Made
4.1 Describe how the local board, working with the entities carrying out core programs, will expand access to employment, training, education, and supportive services for eligible individuals, particularly eligible individuals with barriers to employment.	As needed	No significant changes	Tweaked N2W language
4.2 Describe how the local board will facilitate the development of career pathways, consistent with the Career Pathways Definitions.	As needed	No modification	
4.3 Describe how the local board will utilize co-enrollment, as appropriate, in core programs to maximize efficiencies and use of resources.	As needed	No modification	
4.4 Describe one-stop delivery system in the local area, including:	As needed	No modification	

(a) The local board’s efforts to ensure the continuous improvement of eligible providers of services through the system and ensure that such providers meet the employment needs of local employers, and workers and jobseekers.			
4.4b How the local board will facilitate access to services provided through the one-stop delivery system, including in remote areas, through the use of technology and through other means	As needed		
4.4c How entities within the one-stop delivery system, including one-stop operators and the one-stop partners, will comply with WIOA section 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 regarding the physical and programmatic accessibility of facilities, programs and services, technology, and materials for individuals with disabilities, including providing staff training and support for addressing the needs of individuals with disabilities	As needed		
4.4d Describe the roles and resource contributions of the one-stop partners	Modify if there were changes in the financing available to support WIOA Title I and partner-provided WIOA Services	No modification	
4.4e Describe how one-stop centers are implementing and transitioning to an integrated technology-enabled intake and case management information system for core programs and programs carried out by one-stop partners	Review to ensure use of VCW referral portal	No Modification	<p>The document contains information regarding the portal.</p> <p>Sharon will think about this. UniteUS Modify website – we are looking to implement a pilot for using the referral portal. We will be developing an implementation plan to use the portal. As policy and guidance are developed we will follow along with that.</p>

4.4f Describe the services provided by each partner mandated by federal and state law, and other optional partners.	As needed		
4.4g Identify the Virginia Workforce Center Operator for each site in the local area.	Modify if the One Stop Operator has changed  Review to ensure waivers are detailed in this section if the LWDA has an approved One Stop Operator waiver	Modified	Added Lori Strumph, Strumph Associates
4.4h Identify the physical locations of each comprehensive Virginia Workforce Center in the local area, and the co-location strategy for each center (current and planned).	Modify if an address of a Comprehensive Center has changed	No modification	
4.4i If applicable, identify the locations of Virginia Workforce Network affiliated sites, partner sites, or specialized centers.	Modify if an address of an affiliate site, partner site, or specialized center has changed	No modification	
4.5 Describe the policy, process, and criteria for issuing individual training accounts (ITAs) including any limitations on ITA amounts.	Modify if ITA limit has changed	No significant change	Add language that the board will be raising the max allowed
4.6 If training contracts are used, describe processes utilized by the local board to ensure customer choice in the selection of training programs, regardless of how the training services are to be provided.	As needed		
4.7 Describe process utilized by the local board to ensure that training provided is linked to in-demand industry sectors or occupations in the local area, or in another area to which a participant is willing to relocate.	As needed		
4.8 Describe how rapid response activities are coordinated and carried out in the local area.	As needed		

### Section 5 Compliance

<b>Criteria</b>	<b>Modifications Required</b>	<b>Reviewed and determined No Modification Required</b>	<b>Reviewed and Modification Made</b>
5.1 Describe how the local board meets its responsibilities for oversight, monitoring, and corrective action for WIOA Title I programs.	As needed	Modified	Removed language re contracting out
5.2 Describe how the local board conducts business in accordance with the Sunshine Provisions of WIOA staffing plans for the local board.	As needed	No modification	
5.3 Describe the methods and strategies used to ensure timely expenditure of WIOA funds.	As needed	No modification	

<p>5.4 Describe the process for neutral brokerage of adult, dislocated worker, and youth services. Identify the competitive process and criteria (such as targeted services, leverage of funds, etc.) used to award funds to sub-recipients/contractors of WIOA Title I Adult, Dislocated Worker, and Youth services, state the names of contracted organizations, and the duration of each contract.</p>	<p>Modify if Service Provider for Adult, Dislocated Worker, or Youth Services has changed</p> <p>Review to ensure waivers are detailed in this section if the LWDA has an approved Career Services waiver</p>	<p>No significant change</p>	<p>Tweaked this regarding the procurement of services. We may, at some time, procure services as needed even though we provide services.</p>
<p>5.5 Identify the entity responsible for the disbursal of grant funds.</p>	<p>Modify if fiscal agent has changed</p>	<p>No modification</p>	
<p>5.6 Describe the strategy used by the local board to leverage WIOA funds with other federal, state, local, and philanthropic resources.</p>	<p>As needed</p>	<p>No modification</p>	
<p>5.7 Indicate the negotiated local levels of performance for the federal measures</p>	<p>Modify to reflect new negotiated levels of performance</p>	<p>Modified</p>	<p>Added PY 21 and 22 info</p>
<p>5.8 Describe indicators used by the local board to measure performance and effectiveness of the local fiscal agent (where appropriate), contracted service providers and the one-stop delivery system, in the local area.</p>	<p>As needed</p>	<p>No modification</p>	
<p>5.9 Provide a description of any replicated cooperative agreements with respect to efforts that will enhance the provision of services to individuals with disabilities and to 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.</p>	<p>As needed</p>	<p>No modification</p>	
<p>5.10 Describe the actions the local board will take towards becoming or remaining a high-performing board, consistent with the factors developed by the State Board</p>	<p>As needed</p>	<p>No modification</p>	
<p>5.11 Describe the process for getting input into the development of the local plan and providing public comment opportunity prior to submission. Be sure to address how members of the public, including representatives of business, labor organizations, and education were given an opportunity to provide comments on the local plans. If any comments received that represent disagreement with the plan were received, please include those comments here.</p>	<p>Modify to describe process for public comment period for plan modification. Provide exact dates that the plan modification was available for public comment (Maximum comment period 30 calendar days, minimum 14 calendar days.) Provide all public comments that were received.</p>	<p>Modified</p>	<p>Local plan public comment 1/3/23 for 14 days</p> <p>Also removed language re the plan and 18 month timeframe</p>

<p>5.12 Describe professional staff development strategies, including:</p> <ul style="list-style-type: none"> <li>• Process used to ensure staff receive continuous training in workforce development practices</li> <li>• Methods to ensure effective use of the Virginia Workforce Connection system of record and to adhere to timely data entry requirements for WIOA services</li> <li>• Process to measure staff performance and delivery of high-quality customer service</li> <li>• Process to meet and maintain staff certification and Virginia Workforce Center certification as required by Virginia Workforce Development Board Policy 300-06 Change 1 One-Stop Certification Process</li> </ul>	<p>Update to reflect any changes in Virginia Workforce Center Certification. List AJCs that are certified and those that are in process.</p>	<p>Modify March 2023 Leave off Fishersville.</p>	<p>Required update to One-Stop Certification (provide center name and certification date or anticipated certification date)</p>
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Check the attachment, *Statement of Compliance, Plan Signatures, & Fiscal Agent Designation* for the correct address and phone number for you.

## LWDA 4 Modified Local Plan Cover

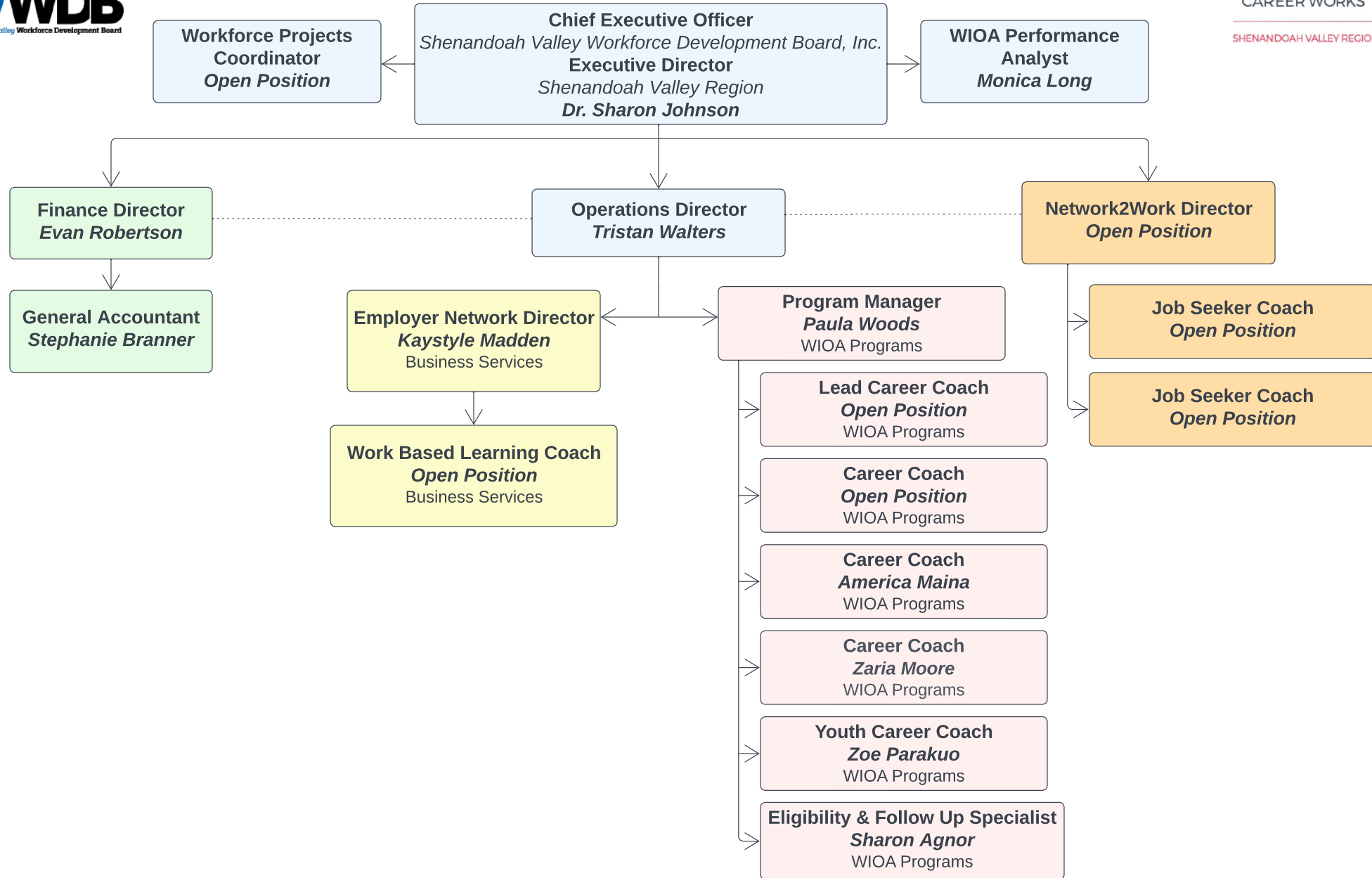
### Confirmation of Required Revisions Made

*The sections listed below have been modified from the previously approved July 1, 2020-June 30, 2024 Local Plan.*

Criteria	Page # in Original Plan	Page # in Revised Plan	Brief Description of Revisions
<b>1.1</b>	<b>3</b>	<b>3</b>	Updated to reflect the most current numbers for the region’s economy with slight increases. The fastest-growing sector in the region changed from Health Care and Social Assistance to Arts, Entertainment, and Recreation. The strongest growth forecast by the number of jobs added Accommodation and Food Services, along with HealthCare and Social Assistance and Transportation and Warehousing.
<b>2.2</b>	<b>24</b>	<b>18-25</b>	Modified Combined State Plan goals from 2020 to reflect new goals of 2022. Deleted comparison table for goals. Modified to show the LWDB’s alignment with new CSP goals. Added language about two new discretionary grants that will assist the SVWDB in reaching its goals; the Workforce Innovation Grant and the Apprenticeship Building America Grant
<b>4.4g</b>	<b>60</b>	<b>58</b>	Added Strumph Associates as One-Stop Operator
<b>4.5</b>	<b>63</b>	<b>61</b>	Updated approved increase in training costs. Added the following: The SVWDB plans to increase the maximum funding allowed for training in 2023, as costs for training have increased over the last few years.
<b>5.7</b>	<b>71</b>	<b>68</b>	Negotiated Performance Levels Updated
<b>5.11</b>	<b>77</b>	<b>74</b>	Public Comment Period for Modification Provided. Comments will be attached.



# Shenandoah Valley Workforce Development Board Organizational Staffing Structure



**Equal Opportunity Employer/Program**

Auxiliary aids and services are available upon request to individuals with disabilities. TDD: VA Relay Center: 711 or 800.828.1120  
a proud partner of the American Job Center Network

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**ONE STOP SYSTEM OPERATOR (OSSO) REPORT**  
**To the Shenandoah Valley Workforce Development Board**  
**January 19, 2023**

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**I. SYSTEM PROCESS IMPROVEMENTS**

**1. Customer Satisfaction Comment Card System**

- The electric comment card system was launched in October 2022
- Summary of Quarterly reports (the full reports are included in the WDB packet)
  - Employer: 4th Quarter, Period: October 14, 2022 – January 1, 2023
    - 2 responses
  - Jobseeker: 4th Quarter, Period: October 14, 2022 – January 1, 2023
    - 13 responses: Positive comments about people and process; one suggested improvement for a *'larger sign to locate'*. Not able to identify which center this refers to.

**2. Launching a Common Referral Process**

- Utilizing the UniteUs Platform expected to launch on February 1<sup>st</sup>. Approx 90% of partners have signed up. Standard Operating Procedures have been developed.

**3. Standardizing Data Collection.**

- Continuing to work on a method to collect data on virtual service delivery which currently is not counted collectively across the partnership.

**II. OPERATIONS**

**1. Status of Centers**

- **Fishersville:** Fishersville had a large flood over the holidays. The center is closed for major repairs due to water damage. Status of repairs changes daily. Up to date information on status will be provided at the WDB meeting by Chris Hurley.
- **Harrisonburg:** Harrisonburg had a HVAC issue with all units not working over the holidays. The center has been closed due to repairs. Up to date information on status will be provided at the meeting by Tristan.
- **Winchester:** Workers from the WIOA Senior Community Service Employment Program have started working at the front and in the resource room. Tristan and Lori continue to meet with area organizations to build relationships and explore ways to maximize use of the Center and ways to work together.. We met with Community Action who will conduct an overview of their services to all staff in Winchester in January.
- **Security Guard at all Centers:** As of December 2022, VEC told the WDB directors that they would no longer pay for the security guards. The Partnership Team had a discussion about how to manage customer flow at the front of each center in the absence of security guards. It became apparent during the discussion that the guards were primarily functioning as greeters, more than security, at each Center. Concurrently the state informed the directors that some additional funds were available through June. Before the various closures, Fishersville had been prioritized to continue the guard full



time through June. Due to the closure, we reprioritized security locations and a guard will be placed in Harrisonburg until June 30, 2023, and in Winchester until March 24, 2023.

**2. Creating professional development opportunities for all partner staff.**

- The monthly informational series, Lunch and Learn, continues monthly in person and virtually.
- Partners prioritized Effective Case Management as the first partner-wide training from the results of the professional development survey. This training is currently scheduled for March, however, due to the center issues in Harrisonburg and Fishersville, it may be delayed.

**2. Facilitating monthly meetings of the MOU Partners,**

- Developing common procedures and knowledge across all centers:
  - Developing a Procedures Manual that applies to all centers.
- The WDB strategic goals are reviewed at each partner meeting to ensure that the strategies being implemented support the goals.

**4. Data Report<sup>1</sup>**

- Since the centers have opened, traffic has increased since last quarter. However, with the holidays and recent closures, traffic has decreased during this quarter.

<b>CENTER</b>	<b>October</b>	<b>November</b>	<b>December</b>	<b>Total for the Qrt</b>	<b>YTD 7.22-12.22</b>
<b>Harrisonburg</b>					
<b>Total Traffic</b>	<b>463</b>	<b>388</b>	<b>228</b>	<b>1079</b>	<b>2,217</b>
New Visitors	231	211	120	562	
Customers seeking unemployment assistance/ID ME	315	260	171	746	
Customers seeking DARS assistance	N/A	N/A	0	0	
Career exploration and training customers	103	92	44	239	
Customers visiting for computer access	15	13	6	34	
Customers seeking GED, tutoring or citizenship services	41	32	10	83	
Virtual services delivered					
No Answer/Other:	N/A	N/A	N/A	N/A	
<b>Winchester</b>					
<b>Total Traffic</b>	<b>365</b>	<b>279</b>	<b>248</b>	<b>892</b>	<b>1,668</b>
New Visitors	231	187	165	583	
Customers seeking unemployment assistance/ID ME	314	247	214	775	
Customers seeking DARS assistance	N/A	N/A	0	0	
Career exploration and training customers	30	24	30	84	

<sup>1</sup> This data is self-report based on the self-serve sign in system.

Customers visiting for computer access	N/A	N/A	0	0	
Customers seeking GED, tutoring or citizenship services	18	7	3	28	
Virtual services delivered					
No Answer/Other:	N/A	N/A	N/A	N/A	
<b>Fishersville</b>					
<b>Total Traffic</b>	<b>279</b>	<b>228</b>	<b>138</b>	<b>645</b>	<b>645<sup>2</sup></b>
New Visitors	141	101	66	308	
Customers seeking unemployment assistance/ID ME	239	203	126	568	
Customers seeking DARS/DBVI assistance	N/A	24	30	54	
Career exploration and training customers	29	21	10	60	
Customers visiting for computer access	N/A	N/A	N/A	N/A	
Customers seeking GED, tutoring or citizenship services	N/A	4	0	4	
Virtual services delivered					
No Answer/Other:	N/A	N/A	N/A	N/A	

***OSSO Goals for 2023***

- Establish and Launch a Common Referral System
- Establish Collaborative Professional Development Opportunities for All Partner Staff
- Improve Communication Among Partners
  - Establish a Shared Drive for Easy Communication Across the Partnership.
- Develop a One-Year Plan for Each Center Operations / Infrastructure
- Improve Data Collection
- Use Technology to Enhance Operations
- Explore Using a Virtual Job Fair Platform
- Continue to Expand Services at Each Center.

<sup>2</sup> Fishersville Center did not start collecting this traffic data using the electronic sign-in until October.

# Business Services

*October to December 2022*

- Business Solutions Team Updates
- Recruitment
  - Job Fair Committee
- Labor Participation Rates
- Upcoming Events
  - Employer Symposium 1/26/23
  - <sup>51</sup> JobStarter 1/30/23



**VIRGINIA  
CAREER WORKS**

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SHENANDOAH VALLEY REGION



# Virginia Career Works Business Solutions Team

*Northern Region; Central/Southern Region*

- The Blackburn Inn, Lineage Logistics, Thermo-Fisher

Upcoming:  
-More Facility Tours  
Friendship Industries  
The Plant Company



VIRGINIA  
CAREER WORKS

SHENANDOAH VALLEY REGION



# Virginia Career Works Job Fairs/Hiring Events

## Job Fair Committee

*Center Hiring Events*

*Regional Hiring Events*

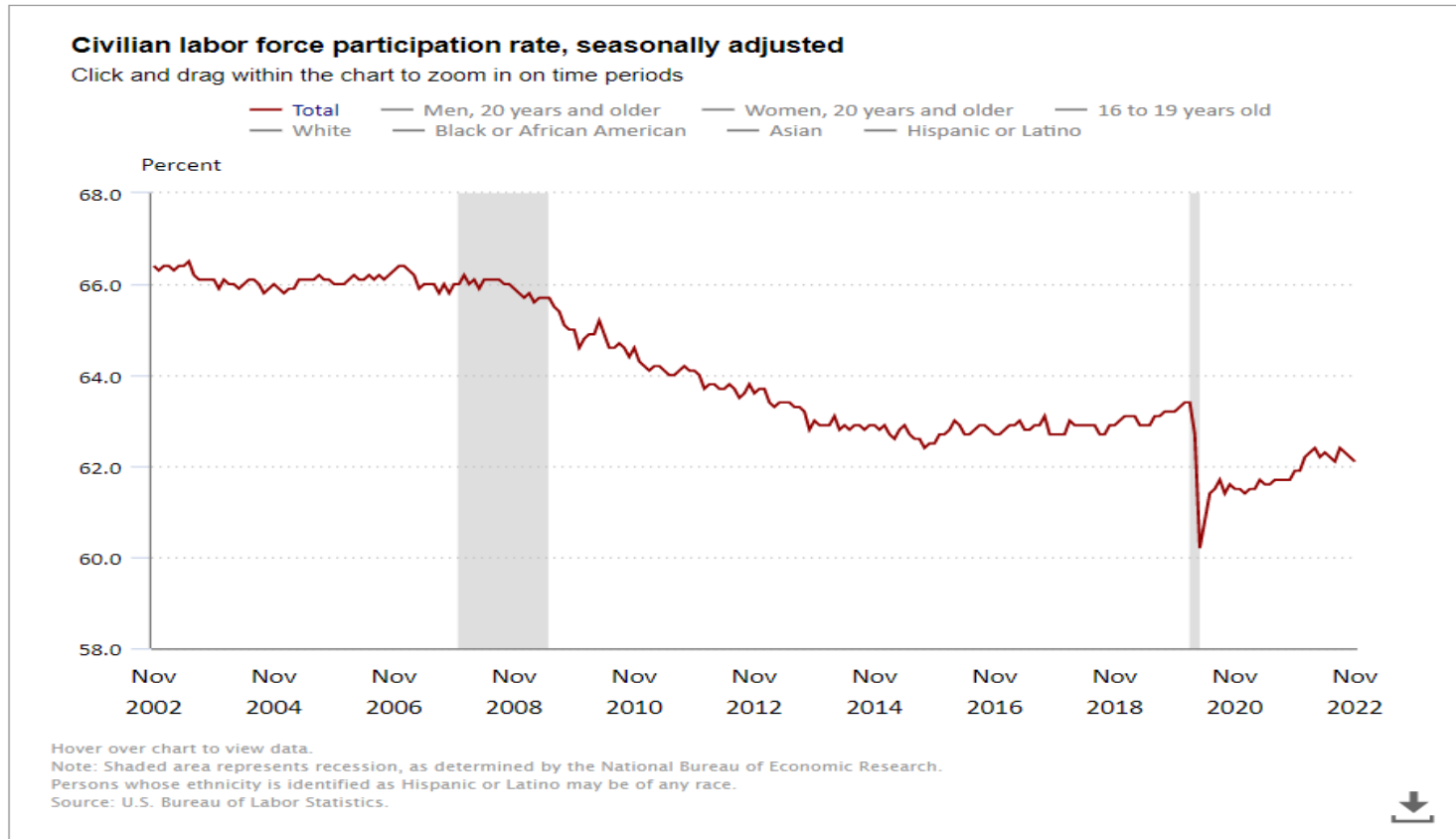
*Virtual Hiring Events*



VIRGINIA  
CAREER WORKS



# New Year, New Numbers





# Upcoming Events

- Employer Symposium & Resource Fair  
– January 26, 2023
  
- JobStarter  
– January 30, 2023





# Thank You!

**Kaystyle Madden, Employer Network Director  
Central & Southern Regions**

**Shenandoah Valley Workforce Development Board, Inc.**

[www.vcwvalley.com](http://www.vcwvalley.com)



**Equal Opportunity Employer/Program**

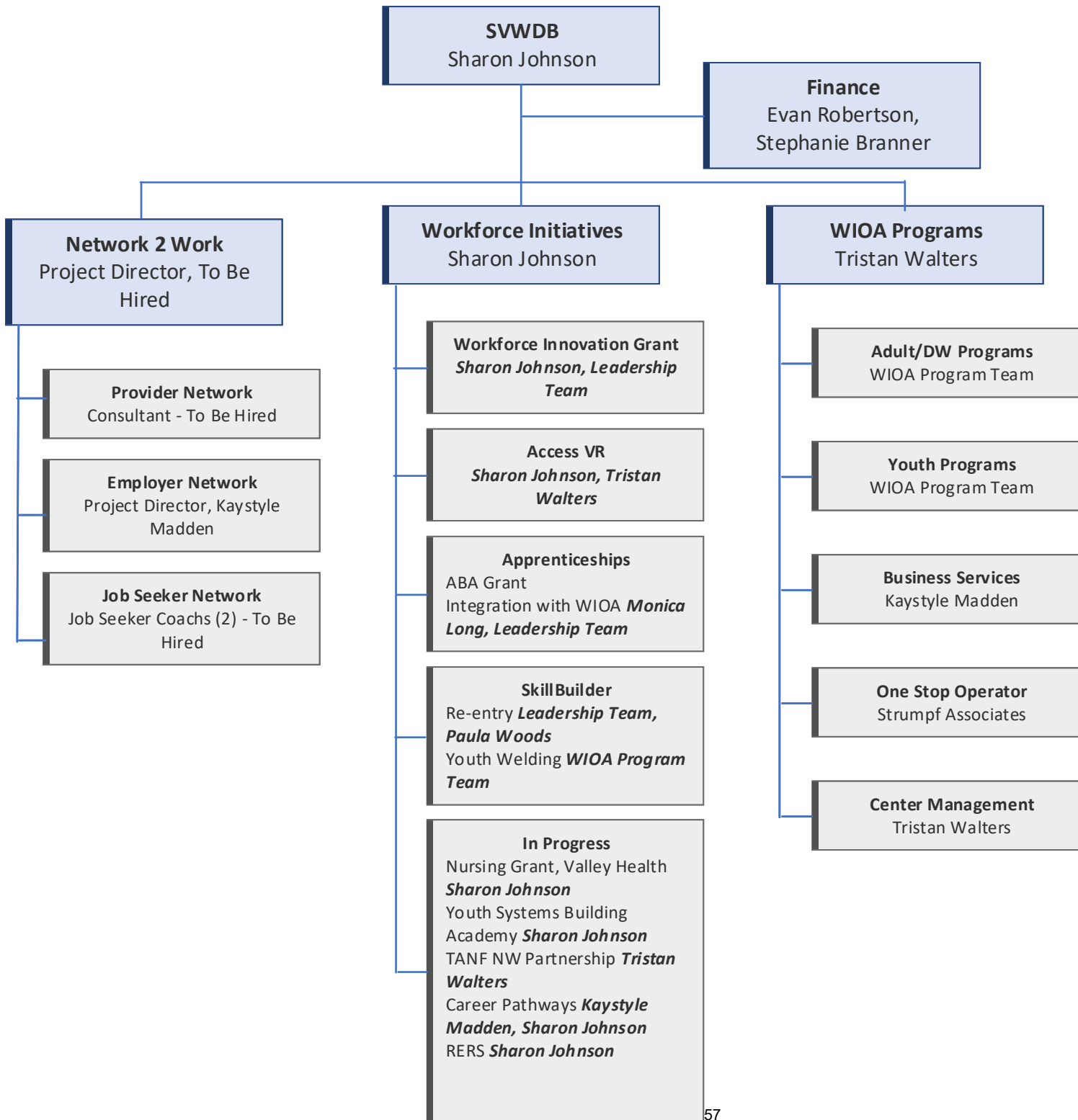
**Auxiliary aids and services are available upon request to individuals with disabilities TDD: VA Relay Center: 711 or 800.828.1120**



SHENANDOAH VALLEY REGION

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