



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

**Board of Directors Meeting  
May 10, 2018, 10:00 a.m. – 12:00 p.m.  
Harrisonburg City Council Chambers  
409 South Main Street, Harrisonburg, VA**

**Call to Order**

- Roll Call
- Introduction of Guests

Jeff Stapel  
Joan Hollen  
Jeff Stapel

**Consent Agenda**

- Prior Meeting Minutes (March 8 Board Retreat Minutes )
- Valley Workforce Center WIOA Dashboard Reports (March/April 2018)
- March 2018 Financial Statements
- SVWDB Communications Outreach Report – May 2018

Jeff Stapel

**SVWDB Workforce Initiatives**

- Strategic Plan Update
- Integrated Business Services Team
- Expanding Service Delivery
  - Functional Alignment of Programs
  - Technology
- Workforce Center Updates
- Valley to Virginia (V2V) Advisory Council Meeting
  - Status Update and Successes
  - American Apprenticeship Initiative (AAI) Conference Debby Hopkins/Sharon Johnson
  - V2V Policy Addendums

Jeff Stapel  
Sharon Johnson  
Sharon Johnson  
Sharon Johnson

Sharon Johnson  
Debby Hopkins

**Virginia Career Works**

- Introduction of Speaker
- Rebranding the Virginia Workforce System
- Regional Branding Ambassador

Sharon Johnson  
Mason Bishop  
Joan Hollen

**Committee Reports**

- Executive Committee
  - Committee Update
  - Officer Election
  - Executive Committee Member Election
- Finance Committee
  - Form 990
  - Finance Committee Member Election

Jeff Stapel

Jeff Stapel

**Other Business**

- GO Virginia Update
- Board Meeting Evaluation

Jeff Stapel  
Jeff Stapel  
Sharon Johnson

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

**Adjournment**

***Next SVWDB Board Meeting: September 13, 2018, 10:00 a.m. – noon. 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 during the Public Input period.
- 2) Individuals should stand when recognized by the Chairman of the Board; speak their name, organization (if applicable) and input topic.
- 3) Individuals should direct input to the Chairman of the Board.
- 4) Individuals are limited to no more than five (5) 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's discretion, the number of speakers may be limited in order to make effective use of Board member's time and to allow an opportunity for input on multiple topics to be heard by the Board.
- 7) All citizens are strongly encouraged to put their comments in writing to the Board prior to the meeting for inclusion in the Board materials. Such written comments should be submitted to the SVWDB office the Monday prior to the Board meeting.



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**Board of Directors Retreat**  
**March 8, 2018, 9:00 a.m. – 2:00 p.m.**  
**JMU Ice House Room 117,**  
**127 W. Bruce Street, Harrisonburg, VA**

**Call to Order:**

Chair Stapel called the meeting to order at 9:00 a.m. The roll was called and introductions were made. A quorum of the board was present.

**Private Sector Members Present:** Annette Medlin, Carrie Chenery, Jeffrey Stapel, Jo Lee Loveland Link, Cara Major, Julie Suijk, Kip Brannon, Robin Sullenberger, Steve Douty, Wes Dove

**Public Sector Members Present:** Amy Judd, Gary Keener, Lara Hoke, Jackson Green, Jeanian Clark, John Downey, Julie Goodlick, Sandy Rinker, Patrick Barker, Robert Goldsmith

**Chief Elected Officials/Alternates Present:** Morgan Phenix, CEO Page County; Liz Lewis, CEO Alternate Page County; Jenna French, CEO Alternate Shenandoah County

**Guests Present:** Chris Pope, VEC Martinsville, Kathy Kalisz, VEC Winchester; Clay Stein and Stephanie Hoer, Goodwill Industries of the Valleys, Camille Miller, The Virginia Group

**SVWDB Staff Present:** Sharon Johnson, Debby Hopkins, Cathi Michie, Matt Green, Debbie Berry, Loretta Snow, Vanessa Robison, Joan Hollen

**Consent Agenda**

**Jeff Stapel**

Chair Stapel asked if there were any items included in the consent agenda that needed to be removed prior to the vote. There were no requests to remove items from the consent agenda.

- Prior Meeting Minutes (November 9, 2017 and January 11, 2018)
- Valley Workforce Center WIOA Dashboard Reports (February)
- Eligible Training Provider Application

Motion by John Downey to approve the consent agenda as presented. Second by Wes Dove. Motion approved unanimously.

**Retreat Introduction**

**Jeff Stapel**

Chair Stapel introduced facilitator Camille Miller, President, The Virginia Group and outlined the objectives and focus of the retreat. The Board was asked to review strategic initiatives identified by the Board and define goals that give staff operational direction. A subject matter expert has been engaged to frame each discussion topic.

Camille Miller opened the discussion by stating that the SVWDB is recognized as one of the top 3 workforce boards in Virginia and commended the board on their progress over the last 7 years. The

process for discussion was outlined and the group was asked to consider the needs of the community and the resources available to the board as they refine the Board's operational goals.

Sharon Johnson provided background information on how the public workforce system operates in Virginia.

- In the current Federal environment, Workforce Boards are able to request waivers on the way they operate. Waiver requests may reduce regulation that restricts the way public workforce systems do business.
- The Workforce Innovation and Opportunity Act (WIOA) is administered by the Department of Labor and funding goes to a state entity for administration. In Virginia, the Virginia Community College System is the fiscal agent for WIOA receiving and administering WIOA funding through the state Title I Administrator.
- Virginia has the Virginia Board for Workforce Development that is responsible for workforce policy development. The Virginia WIOA Title I Administrator provides guidance on policy implementation and can add requirements to WIOA implementation.
- WIOA Title partners are affected differently by WIOA. Title I serves adult, dislocated worker, and youth and is administered locally by 15 Workforce Development Boards in Virginia. The Department of Education administers Adult Education and Literacy Act programs, the Virginia Employment Commission administers Wagner-Peyser employment services, and vocational rehabilitation is administered through the Department for Aging and Rehabilitative Services (DARS) and Department for Blind and Vision Impaired (DBVI).
- DARS is currently focused on working with the K-12 school system.
- The Virginia Economic Development Partnership is making an effort to establish Virginia as the number one state to do business. Virginia has been downgraded by site selectors as having a fractured workforce system. Businesses don't know who to call if they need a workforce solution. VEDP is moving forward with a turnkey customized workforce solution to support businesses.

## **LABOR FORCE PARTICIPATION AND UNDEREMPLOYMENT**

### **Framing the Problem - Dr. John Downey**

The Labor Force Participation Rate is the number of people that are available to work as a percent of the total population in the age group of 16-64 except those incarcerated. This differs from the unemployment rate, which only measures those persons seeking employment. The Labor Force Participation Rate in 2016 for the SVWDB region was 61-65% compared to 67.9% in Virginia and 62.9% in the U.S. The share of Americans with jobs decreased 4.5% since 1999 resulting in 11.4 million less workers today.

*ALICE*, a recent study by the United Way, which stands for **A**sset **L**imited, **I**ncome **C**onstrained, **E**mployed, shows that 39% of Virginia households are facing financial hardships. The ALICE population represents individuals and families who work hard and earn more than the Federal Poverty Level, but less than the basic cost of living. ALICE struggles to afford the necessities, including housing, food, childcare, health care, and transportation. Fifty-seven percent of jobs in Virginia pay less than \$20.00 per hour with most paying between \$10.00 and \$15.00 per hour.

*The Labor Supply and Demand in Virginia: A Dynamic approach to Understanding the Labor Force 3Q2017* discusses underemployment and the involuntary part-time employment that resulted from the Affordable Care Act, which caused many employers to decrease workers' hours to avoid paying higher health care costs. These workers are busy working multiple part time jobs to survive and do not have the time or resources for training to improve skills and seek full-time employment.

A Washington Post Article from February 22, 2018, entitled “*Millions of jobs are still missing. Don’t blame immigrants or food stamps.*” provides insight into what happened to those not working in America. Half of those no longer in the labor force are the aging population. 2.65 million jobs were lost due to the outsourcing of low skilled manufacturing labor. An additional 1.4 million jobs were lost to automation. Other factors include an increased number of people on Social Security Disability, which nearly doubled from 1999 to 2016, a shrinking youth employment rate, disabled Veterans, and those incarcerated. Challenges facing the non-employed population in finding work include a skills mismatch, lack of willingness to move for a job, an increase in jobs needing a license, and drug/opioid use increase.

The group discussed potential ways to address labor force participation factors and underemployment to positively affect low unemployment and increase the availability of workers.

- Train the employer. Employers are not often flexible in recruitment and how training is delivered.
- Understand the pipeline. Can we upskill employees to fill positions that are more skilled?
- Engage non-profit sectors. Non-profit sectors that are working with the population of part-time workers need to be plugged into the business sector.
- Explore more data. There is a need for additional regional data to determine and prioritize the most impactful action plans.
- Cooperative regional childcare and transportation solutions could help break down barriers for part-time workers to achieve full time status.
- To overcome barriers to employment, workforce partners could meet clients where they are.
- Educate the community on services available through workforce partners including training resources and length of training to achieve specific goals.
- Consider generational differences. Seek to engage the pockets of people not currently engaged in the workforce.
- Connect with Youth while they are still in school.
- Influence the mindset of youth, parents and teachers. Glamorize employment opportunities available without a 4-year college degree.
- Redefine what college means. Promote a joint education pathway instead of either/or approach to post-secondary education. Adopt a lifelong learning philosophy.
- Consider the impact a Medicaid work requirement might have on the workforce.
- Consider the microcosm of each community and recognize that silos exist in rural communities due to the lack of employment opportunities.
- The local workforce system should drive business services not WIOA. How do we reorganize to get local people educated about and engaged in workforce development?

## **BUSINESS SERVICES – MOVING BEYOND COMPLIANCE**

### **Defining the Current State – Dr. Sharon Johnson**

Business services are growing in importance at the state and national level. Due to low unemployment, there is more demand for business services such as incumbent worker training, on-the-job training, and registered apprenticeship. There is limited funding in WIOA for business services with only 20% of Adult and Dislocated Worker funding allowed for incumbent worker training. SVWDB has historically provided business services through discretionary grants such as the Energy Partnership Grant, On-the-Job Training Grant, and Registered Apprenticeship grant, however, discretionary grant availability has dried up.

SVWDB has two Business Services Teams, one in Winchester and one in Harrisonburg. Center partners and other key partners are part of the business services teams, which meet regularly and are in the process of formalizing a team approach to providing integrated business services in the region. The Roanoke Business

Services Team Coordinator visited and shared their experience in forming the business services team and engaging partners in an integrated approach to serving businesses.

SVWDB needs resources for a full-time business services coordinator, marketing materials consistent across partners, and a communication tool (CRM) to share information among partners. The team is currently developing a Google document to share information among partners. SVWDB was selected to participate in a national Integrated Business Services Cohort through the U.S. Department of Labor. This opportunity is providing insight into the challenges and successful models across the U.S. in implementing business services.

### **Working with Businesses Today...Our Philosophy – Debby Hopkins and Sean McCusty**

Federal grants have been essential in our region and SVWDB has been aggressive in seeking discretionary grants. Since 2010, the SVWDB has received \$16 million in funding for workforce development efforts with \$14 million coming from the Department of Labor. These grants have helped SVWDB deliver business services to employers that they would otherwise not have the resources to provide. Discretionary grants have helped SVWDB build relationships with the business, education, and economic development communities.

The SVWDB Business Services Teams include partner agencies that provide workforce services to businesses. The SVWDB regional workforce partners collaborate well and make referrals but there is no formal system in place to support integrated business services among partners. The team works to educate employers on the services available among the various workforce partners and provides information on training practices and opportunities.

Employer considerations:

- Employers are operating under the assumption that they can post a job and can get a flood of qualified applicants, which is not the case.
- Employers need to consider upskilling current employees and backfilling vacant jobs created by employee advancement.
- An aging workforce is recognized but employers do not know how to fill these longstanding positions once the employee retires.
- Eighty percent of employers have never utilized workforce services.
- The Business Services Team has an opportunity to educate employers on how programs work and the associated program requirements.
- Would business contribute financially to a business services initiative?

The group discussed and reported back on the following questions:

#### **1. What business services do businesses want?**

- a. A single place where businesses can go for workforce information and solutions. A single point of contact for workforce support and resources. Consider a regional web site with two clicks to important information.
- b. Small employers without a dedicated human resources staff do not know where to go for support.
- c. What previously worked is no longer working. Need a paradigm shift, a single regional point of contact, new resources, and new strategies.
- d. Access to solutions to make the business better.
- e. Push out information through Chambers of Commerce.
- f. Define business needs and where partners fit into the solutions.

- g. Formalize a single point of contact approach to business services. It is about the service, not the agency providing the service.
- h. SVP has a one page web platform called Valley Career Hub that could be used as a contact point for education and training resources. [www.valleycareerhub.com](http://www.valleycareerhub.com)
- i. Consider Small Business Development Center model. Customers go to a web site and sign up as a client. Then SBDC reviews application and directs services accordingly.
- j. Speak business language not workforce acronyms.

**2. What performance metrics does the board want to see for accountability?**

- a. Tracking the number of visits is a bad metric. Tracking the outcome of a visit is a more valuable metric.
- b. A Customer Relationship Management (CRM) tool is needed to share information among workforce partners and to track services provided.
- c. Businesses need to share results of services provided (i.e. customer satisfaction survey).
- d. Track services and outcomes (measure wage increase due to services/training)

**3. What services are offered by the four WIOA titles?**

- a. Title I – On-the-Job Training, Incumbent Worker Training, adult, dislocated worker and youth skills training, supportive services, career services, labor market information (SVWDB/Valley Workforce Centers).
- b. Title II –adult education and English literacy (Adult Education).
- c. Title III – jobseeker services and unemployment benefits (Virginia Employment Commission).
- d. Title IV – services for individuals with disabilities including vocational rehabilitation, occupational training, and assistive technologies (Department for Aging and Rehabilitative Services and Department for Blind and Vision Impaired).

## **RESOURCE DEVELOPMENT**

### **Overview of How the Money Flows – Cathi Michie**

Chief Finance Officer Cathi Michie provided an overview of how WIOA funding flows from the Department of Labor to the Virginia Community College System and to the local workforce areas. Cash flow has an impact on how SVWDB does business. Only enough funds can be pulled to pay current expenditures plus 14 days of operations. The presentation can be accessed at this link <https://prezi.com/view/3ExmaxXpOFYTbgJB516X/>.

Sharon Johnson is working to get information on the state formula that determines local WIOA allocations. As the cash flow presentation indicates, the VCCS retains an allowable portion of WIOA funds and distributes WIOA funds to local workforce boards based on a formula. Local boards need to learn more about the formula allocation process to be able to budget appropriately. There is renewed interest in using WIOA funds for governor led initiatives and as unemployment decreases, workforce funding is reduced.

### **Virginia Combined State Plan Update – Sharon Johnson**

Sharon Johnson provided information on the one year update to the Virginia Combined State Plan. The update is being led by the Governor's office and each WIOA title organization provides input into the plan. Modifications are due to the administration by March 22. The Virginia Board for Workforce Development will review and vote on the changes. A state workforce retreat will be held in May to further drill down on the Combined State Plan.

### **Potential Resource Development – Sharon Johnson**

SVWDB is really good at seeking grants. Grants are program money, not administrative money. SVWDB has no discretionary funds to support workforce services outside the WIOA funding and the current American Apprenticeship Initiative grant. The following examples of options to increase funds to SVWDB were provided:

- **Fee-for-service work.** Are there gaps in services that SVWDB could provide for a fee such as fees charged for training or recruiting?
- **Tiered funding solicitation model.** Private investments at a tiered funding/service level (i.e. Platinum, Gold, Silver investment levels with services corresponding to investment levels).
- **Special event or project.** A fee based event such as an annual award banquet or technical assistance training for pay.
- **Spin off for profit organization providing consulting or other workforce related services.**
- **Integration of services.** Identifying and reducing duplication of services among workforce partners. How can we do more with less?
- **Central office functions.** Identify gaps in service that we could provide to other boards (i.e. monitoring, fiscal management).

### **How can the SVWDB be supported with funds other than WIOA?**

The group was asked to consider what SVWDB could do to generate unrestricted funds and what gaps in service need to be filled with those funds.

- Create our own staffing agency.
- Fee for services such as monitoring, grant writing, labor market data mining, fiscal agent.
- Fee for services such as talent screening and interviewing for employers.
- Target youth in school that are going directly to work and work to get them into the labor force. Would employers pay for this type of service?
- Solicit in-kind gifts such as web services and marketing.
- Seminars for a fee for other Workforce Boards.

### **SUB-REGIONALIZATION**

#### **Defining the Current State – Sharon Johnson**

The Shenandoah Valley Local Workforce Development Area IV (LWDA IV) is one of the largest workforce regions in the state. The board has conducted studies by sub-region to capture regional differences. We have tried moving board meetings around the region but have lost board participation in the process. How do we operationalize such a large region and still give each sub-region a voice? Do we need to keep discussing sub-regionalization?

The group discussed and provided feedback on sub-regionalization:

- Make sure that all parts of the region have a voice and that the voice is heard by the Board.
- No need for formalized sub-regions just be aware of differences.
- Have a conduit to communicate the needs of all parts of the region.
- Be mindful that representation does not mean engagement. Consider the participation rate by locality and get that information to the Chief Elected Officials.
- Have regional sub-groups that can meet between board meetings to address sub-regional issues and report to the board.
- Pick a sub-region per board meeting and provide meaningful information to the board on that sub-region.
- Use WebEx or Skype to engage more board members and investigate the Sunshine provisions.
- Engage community colleges and report on community college workforce activities.
- Recognize and share the differences, do not silo because of differences.
- Identify and share best practices.

## **BOARD MEMBER AND CHIEF ELECTED OFFICIAL DEVELOPMENT**

### **Our Journey Over the Last Year – Jeff Stapel and Sharon Johnson**

Jeff Stapel gave a historic look at the past 17-18 years of his service on the SVWDB. In 2010/2011, the board began transition to a more integrated and developed board. The Board has the ability to bring partners together, which gives the board the ability to leverage assets to support workforce development. It is important for board members to understand how the board functions so they can be SVWDB ambassadors for the region. Board members need to feel that their time is invested wisely, that their voice is heard, that they are respected, and valued for their contribution. Feedback from board members is needed on continuous improvement and how to engage the Chief Elected Officials.

Current efforts for continuous improvement include succession planning, increased board engagement, getting new members on the board, and engaging local elected officials. Mission Moments will be added to upcoming board meetings by including a success story from a job seeker and/or business to show how SVWDB services have real life impact. SVWDB needs to demonstrate the success and benefits of the organization to the Chief Elected Officials so they take this information back to their local governing bodies. An elevator speech is needed and Jo Lee Loveland-Link offered to assist the group in developing an elevator speech for the Board and Chief Elected Officials to be ambassadors for the SVWDB.

The group was asked to consider the following questions when discussing Board and Chief Elected Official Engagement: 1) What do we keep doing?; 2) What do we start doing?; and 3) What do we stop doing?

- Continue dissemination of information and orientation packets to equip the board with knowledge about the SVWDB.
- Start Individualizing board orientation where needed.
- Start providing a new board member with a board member mentor for orientation.
- Start communicating expectations to Board members.
- Keep the meeting schedule and location as it is.
- Start talking about all system partners, not just Title I.
- Start creating value added services for private sector board members.
- Start providing opportunities to build relationships with board members and partners. Put faces to names.
- Keep up the good engagement with Board members, but consider room for growth in this area.
- Keep the board free from financial commitment to participate.
- Start focusing on a specific program at each meeting so board members can learn about the programs.
- Start providing program and service outcomes to elected officials to take back to their governing bodies.

Jeff Stapel closed the meeting by saying that the information collected today will be processed and sent back out to the board. Please send any ideas or suggestions to staff. This is not the end of the process. Actionable items will be developed from the discussion points. The next board meeting on May 10, 2018 will include nominations for new members to the Executive Committee.

**Public Input (Rules and Guidelines attached):** There was no public input.

**Adjournment:** The meeting adjourned at 11:50 a.m.

Respectfully submitted, Joan Hollen

**The next SVWDB Board Meeting: May 10, 2018, 10:00 a.m. – 12:00 p.m.**

**Location to be Determined**

**Resources:**

**Labor Force Participation Rate in Virginia**

<http://virginialmi.com/content/pdfs/2016%20Labor%20Force%20Participation%20Rates.pdf>

**ALICE 2017 Virginia Report**

[https://www.dropbox.com/s/9chqmv4c6viv2n/17UW%20ALICE%20Report\\_VA\\_7.18.17\\_Lowres.pdf?dl=0](https://www.dropbox.com/s/9chqmv4c6viv2n/17UW%20ALICE%20Report_VA_7.18.17_Lowres.pdf?dl=0)

**Labor Supply and Demand in Virginia: A Dynamic approach to Understanding the Labor Force 3Q2017**

[https://virginialmi.com/content/pdfs/Alternative%20Measures\\_2017%20Q3.pdf](https://virginialmi.com/content/pdfs/Alternative%20Measures_2017%20Q3.pdf)

**Millions of jobs are still missing. Don't blame immigrants or food stamps.**

[https://www.washingtonpost.com/news/wonk/wp/2018/02/22/fewer-americans-are-working-dont-blame-immigrants-or-food-stamps/?utm\\_term=.114470ad8a1b](https://www.washingtonpost.com/news/wonk/wp/2018/02/22/fewer-americans-are-working-dont-blame-immigrants-or-food-stamps/?utm_term=.114470ad8a1b)

**How the Money Flows – Cathi Michie**

<https://prezi.com/view/3ExmaxXpOFYTbgJB516X/>

# Valley Workforce Center

## March, 2018

*20 days of Operation*

### WIOA PROGRAM INFORMATION

WIOA Clients Program YTD	Adult	Dislocated Worker	Youth	Totals
Carryover Clients from Previous Program Year	140	97	107	344
New Enrollment for this Program Year	86	32	42	160
<i>New Enrollments March 2018</i>	7	2	3	12
<i>Exited March 2018</i>	13	4	4	21
Exits this Program Year	113	75	78	266
Total Active WIOA Participants	112	54	74	240
Placement Rate	79.6%	90.4%	76.6%	81.00%
Average Wage at Placement	\$13.50	\$16.07	\$10.94	\$13.68
Exited Exclusion from Performance	5	2	1	8

TRAFFIC	MONTH	YTD
Northern Total	454	3,366
Central Total	714	6,314
Total	1,168	9,680
Outreach	480	1,547
<b>Total all Activities</b>	<b>1,648</b>	<b>11,227</b>
Last Year Same Month	1,226	9,391
Monthly Avg	82	
Daily Avg - YTD	62	

UNEMPLOYMENT RATE <small>(most recent available)</small>			
	Feb. 2017	Feb. 2018	% Change
LWIA IV	3.9%	3.3%	0.6%
VIRGINIA	4.2%	3.3%	0.9%
US	4.9%	4.4%	0.5%

Top Courses of Study		
	Month	TYD
Certified Nursing Assistant	4	15
Commercial Drivers' License	4	24
Licensed Practical Nurse	0	21
CMA	4	16

Training/Education Providers			
Name			Total YTD
Adult Education Provider/GED			3
Blue Ridge Community College			31
Lord Fairfax Community College			56
Dabney S. Lancaster Community College			7
Massanutten Technical Center			33
Valley Career and Technical Center			5
Winchester Medical Center			
Page County Technical Center			3
James Madison University			1
Byers Institute			10
Other Approved Provider			3
Total			151

Valley Workforce Center				
April, 2018				
23 days of Operation				
WIOA PROGRAM INFORMATION				
WIOA Clients Program YTD	Adult	Dislocated Worker	Youth	Totals
Carryover Clients from Previous Program Year	140	97	107	344
New Enrollment for this Program Year	116	34	50	200
New Enrollments April 2018	29	2	5	36
Exited April 2018	8	8	11	27
Exits this Program Year	123	83	89	295
Total Active WIOA Participants	133	48	68	249
Placement Rate	81.0%	87.6%	78.4%	82.10%
Average Wage at Placement	\$13.50	\$16.07	\$10.94	\$13.68
Exited Exclusion from Performance	7	2	1	10

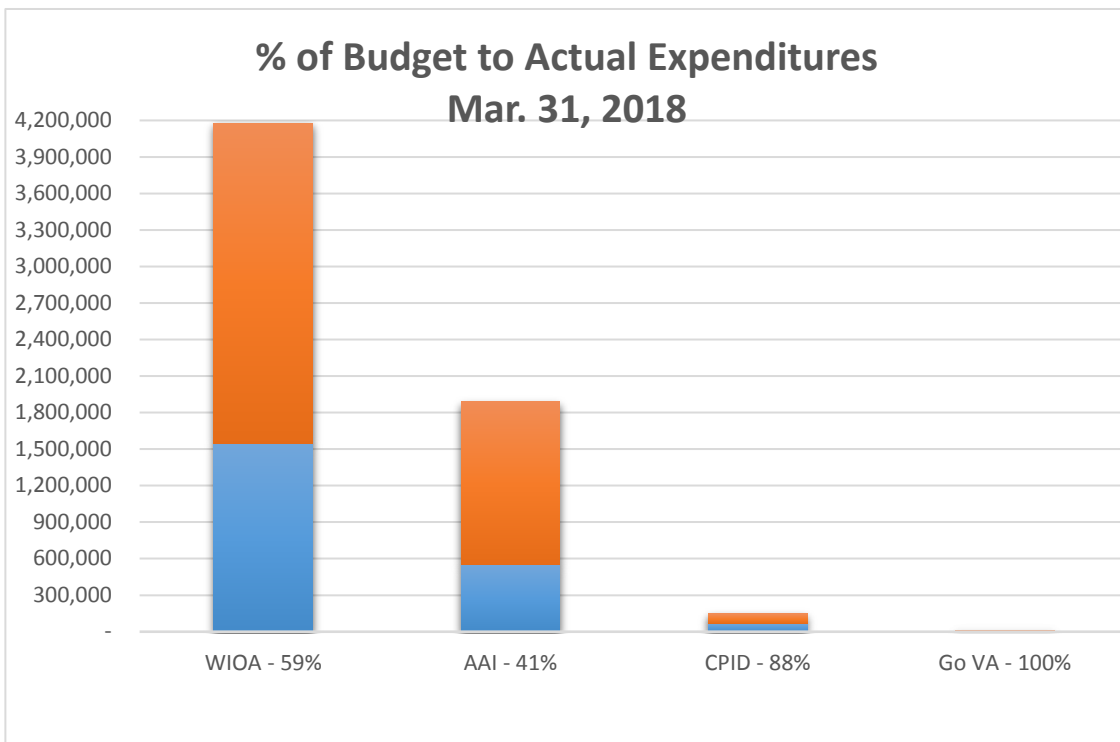
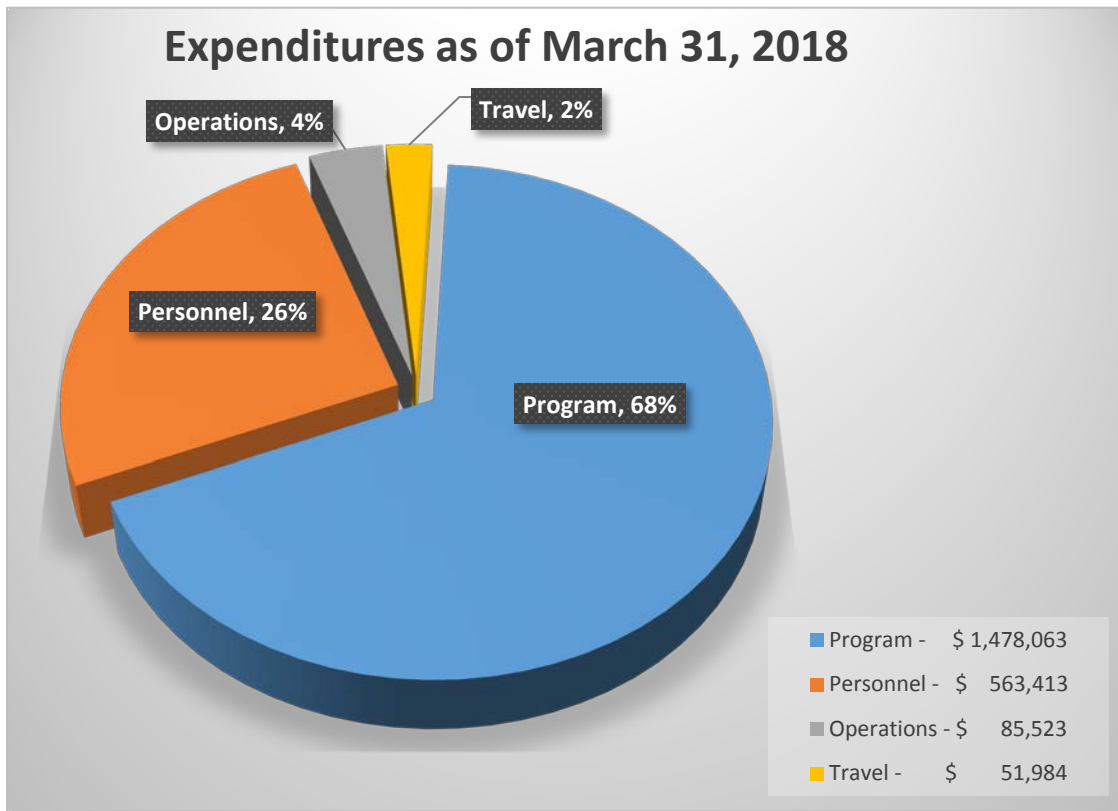
TRAFFIC	MONTH	YTD
Northern Total	439	3,805
Central Total	735	7,049
Total	1,174	10,854
Outreach	578	2,125
<b>Total all Activities</b>	<b>1,752</b>	<b>12,979</b>
Last Year Same Month	951	9,391
Monthly Avg	76	
Daily Avg - YTD	60	

Top Courses of Study		
	Month	TYD
Certified Nursing Assistant	4	15
Commercial Drivers' License	8	34
Licensed Practical Nurse	2	23
CMA	4	20

UNEMPLOYMENT RATE (most recent available)			
	Feb. 2017	Feb. 2018	% Change
LWIA IV	3.8%	3.3%	0.5%
VIRGINIA	3.9%	3.3%	0.6%
US	3.9%	3.5%	0.4%

Training/Education Providers			
Name			Total YTD
Adult Education Provider/GED			3
Blue Ridge Community College			42
Lord Fairfax Community College			65
Dabney S. Lancaster Community College			7
Massanutten Technical Center			34
Valley Career and Technical Center			5
Winchester Medical Center			
Page County Technical Center			3
James Madison University			1
Byers Institute			11
Other Approved Provider			1
Total			173

**Shenandoah Valley Workforce Development Board, Inc.**  
**As of March 31, 2018**



**Shenandoah Valley Workforce Development Board, Inc.**  
**Statement of Financial Position**  
**As of March 31, 2018**

*Unaudited*

**Assets**

Current Assets

Cash and cash equivalents	\$	94,374
Accounts receivable		176,185
Prepaid expenses		<u>2,273</u>

<b>Total Assets</b>	<b>\$</b>	<b><u>272,832</u></b>
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**Liabilities and Net Assets**

Current Liabilities

Accounts payable	\$	157,529
Accrued leave		<u>52,524</u>

Total Liabilities	\$	210,053
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Net Assets

Unrestricted	\$	29
Temporarily restricted		<u>62,750</u>

Total Net Assets	\$	62,779
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<b>Total Liabilities and Net Assets</b>	<b>\$</b>	<b><u>272,832</u></b>
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Shenandoah Valley Workforce Development Board, Inc.  
Statement of Activities - With FY2018 Budget  
Unaudited

	For the period ended March 31, 2018			FY2018 Budget	% of Total Budget
	Unrestricted	Temporarily Restricted	Total		
<b>Changes in Net Assets</b>					
<b>Support and revenue</b>					
WIOA Grants	\$ -	\$ 1,569,574	\$ 1,569,574	\$ 3,776,696	42%
American Apprenticeship Grant	-	552,874	552,874	1,337,222	41%
Career Pathways Grant	-	69,355	69,355	78,510	88%
Go Virginia Technical Assistance	-	6,859	6,859	6,800	101%
Other revenue	-	41,071	41,071	-	0%
Satisfaction of Program Restrictions	2,176,983	(2,176,983)	-	-	0%
<b>Total Support and revenue</b>	<b>\$ 2,176,983</b>	<b>\$ 62,750</b>	<b>\$ 2,239,733</b>	<b>\$ 5,199,228</b>	<b>43%</b>

## Expenses

### WIOA Grants Expenses

Administration					
Personnel	\$ 194,091	\$ -	\$ 194,091	\$ 270,120	72%
Operations	6,480	-	6,480	7,760	84%
Office Operations	18,623	-	18,623	23,730	78%
Financial	1,763	-	1,763	7,460	24%
Travel	26,280	-	26,280	31,770	83%
Total Administration	247,237	-	247,237	340,840	73%
Program Services					
Adult contracts	524,982	-	524,982	922,500	57%
Dislocated worker contracts	258,167	-	258,167	327,500	79%
Youth contracts	373,371	-	373,371	815,000	46%
Goodwill One Stop Services	6,667	-	6,667	10,000	67%
Valley Workforce (Leases, IT, etc.)	125,760	-	125,760	152,200	83%
Incumbent Worker Training	-	-	-	15,000	0%
OJT Contracts	-	-	-	5,000	0%
Professional Services	2,209	-	2,209	15,000	15%
Purchase of new computers	1,497	-	1,497	10,000	15%
Board website, branding & outreach	10,000	-	10,000	14,400	69%
Total Program Services	1,302,653	-	1,302,653	2,286,600	57%
<b>Total WIOA Grants Expenses</b>	<b>\$ 1,549,890</b>	<b>\$ -</b>	<b>\$ 1,549,890</b>	<b>\$ 2,627,440</b>	<b>59%</b>

**American Apprenticeship Grant Expenses**

Administration					
Personnel	\$ 334,468	\$ -	\$ 334,468	\$ 507,980	66%
Operations	11,834	-	11,834	14,570	81%
Office Operations	38,142	-	38,142	50,570	75%
Financial	2,103	-	2,103	12,632	17%
Travel	22,181	-	22,181	20,670	107%
Total Administration	408,728	-	408,728	606,422	67%
Total Program Services	142,360	-	142,360	730,800	19%
<b>American Apprenticeship Grant</b>	<b>\$ 551,088</b>	<b>\$ -</b>	<b>\$ 551,088</b>	<b>\$ 1,337,222</b>	<b>41%</b>

**Career Pathways Grant Expenses**

Administration					
Personnel	\$ 29,067	\$ -	\$ 29,067	\$ 33,490	87%
Operations	947	-	947	3,020	31%
Office Operations	2,778	-	2,778	5,450	51%
Financial	149	-	149	1,150	13%
Travel	3,181	-	3,181	4,400	72%
Total Administration	36,122	-	36,122	47,510	76%
Total Program Services	33,050	-	33,050	31,000	107%
<b>Total CPID Grant Expenses</b>	<b>\$ 69,172</b>	<b>\$ -</b>	<b>\$ 69,172</b>	<b>\$ 78,510</b>	<b>88%</b>

**Go Virginia Technical Assistance Expenses**

Administration													
Personnel	\$	5,787	\$	-	\$	5,787	\$	5,200	111%				
Operations		188		-		188		250	75%				
Office Operations		486		-		486		630	77%				
Financial		30		-		30		130	23%				
Travel		342		-		342		590	58%				
Total Administration						6,833	-	6,833	6,800	100%			
Total Go Virginia Expenses					\$	6,833	\$	-	\$	6,833	\$	6,800	100%

<b>Total Expenses</b>		<b>2,176,983</b>		<b>-</b>		<b>2,176,983</b>		<b>4,049,972</b>	<b>54%</b>
<b>Change in Net Assets</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>62,750</b>	<b>\$</b>	<b>62,750</b>	<b>\$</b>	<b>1,149,256</b>	

<b>Net Assets, Beginning</b>	<b>\$</b>	<b>29</b>	<b>\$</b>	<b>-</b>	<b>\$</b>	<b>29</b>
<b>Net Assets, Ending</b>	<b>\$</b>	<b>29</b>	<b>\$</b>	<b>62,750</b>	<b>\$</b>	<b>62,779</b>



Jeff Stapel, Chairman

Sharon Johnson, Chief Executive Officer

## Communications & Outreach Program Report May 2018

### **1<sup>st</sup> Quarter 2018 Highlights**

The following communications and outreach tasks were accomplished:

- Published and shared content on social media highlighting workforce staff activities and accomplishments, as well as partner programs and workforce trends.
- Posted five blog posts on the topics of Virginia Values Veterans (V3) training, new Virginia Career Works branding, and the GO Virginia initiative.
- Promoted a variety of job fairs, program accomplishments, special events and workforce center training events.
- Completed a Q1 newsletter.
- Issued press releases for V3 training event and extended Winchester Workforce Center hours.

**Goals and focus for next reporting period:** Continue to build community awareness via social media, newsletter, blogging, and media stories. Prepare and make transition to new branding.

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### **Media**

Media coverage during the 1<sup>st</sup> quarter 2018 included:

- [McAuliffe unifies Va. workforce centers under new brand](#), WHSV, January 9, 2018.
- [Virginia recognized as top state for workforce development programs](#), WHSV, February 28, 2018.
- [Veterans training program teaches local companies how to hire veterans](#), WHSV, March 20, 2018.

**Goals and focus for next reporting period:** Continue consistent media announcements of workforce activities and accomplishments.

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### **Email**

Email outreach for Q1 included:

- An update to the outreach email lists.
- Announcement for the V3 training event was sent to the employers list.
- Q1 email newsletter was distributed with above average engagement at a 27.1% open rate, 5.2 % click rate.
- Overall list average remains solid with a 35.7% open rate, 5.3% click rate. (As compared to the industry average of 23.5% open rate and 3.1% click rate.)

**Goals and focus for next reporting period:** Maintain consistent and pertinent newsletter distribution. Continue to build newsletter list.

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P.O. Box 869 • 217 South Liberty Street, Suite 203 • Harrisonburg, VA 22803-0869 • Telephone: 540.442.7134  
Fax: 540.437.9808 • TDD: VA Relay Center 800.828.1120 or 711 • [valleyworkforce.com](http://valleyworkforce.com)

## **Social Media**

Steady organic growth of followers/engagement continued across SVWDB social media channels during this reporting period. Highlights include:

- LinkedIn updates have shown a significant increase in reach and engagement during this reporting period, with organic reach peaking at 6,889 in January 2018 and post clicks at a high of 91 in March 2018.
- Training events and job fairs consistently get the most engagement on Facebook and Twitter, with articles/videos about innovative programs and tips for job search or interviews also of interest to the social community.

**Goals and focus for next reporting period:** Continue organic growth through strong content and best social media practices. Make transition to new branding in Q3.

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## **Website**

New content published:

- [Virginia Values Veterans Training Event](#)
- [GO Virginia Region 8 Now Accepting Round 3 Project Proposals](#)
- [New Brand to Connect Virginia's Job Seekers and Employers](#)
- [GO Virginia Region 8 Funded for Advanced Manufacturing Training Program](#)
- [GO Virginia Region 8 Grand Funds Available for Eligible Projects](#)
- Calendar, staff and success stories updates.

### **Analytics for this reporting period, 1/1/18-3/31/18**

2,461 unique users

3.48 pages per session/ 3:42 minutes

11,859 page views

83.9 % new visitors

Sources: organic search 67.7%

referral 7%

direct 23.4%

social 1.8%

### **Analytics for reporting period 10/1/17-12/31/17**

2,471 unique users

3.39 pages per session/ 3:38 minutes

11,682 page views

47.64% new visitors

Sources: organic search 59.9%

referral 5%

direct 18.5%

social 4.8%

other 11.9% (referrer spam)

**Goals and focus for next reporting period:** Prepare and make transition to new branding in Q3.

## DOL/ETA INTEGRATED BUSINESS SERVICES TA COHORT: COHORT TEAM ACTION PLAN

After completing the Integrated Business Services Self-Assessment, complete the following action plan as a team. This plan will be a living document that will change as your partnership progresses. Cohort teams will be asked to report out on these at the end of the 2018 cohort.

### **Integrated Business Services Vision**

In five years the Valley Workforce Business Services Team will be the recognized point of contact for the regional business community by building trust and collaboration among partners to deliver integrated business solutions to regional businesses.

<b>What are our top 3 strategies?</b>	<b>How will we get there?</b>	<b>How long will this take?</b>	<b>Who's responsible?</b>	<b>How will we know we're successful?</b>
<i>Think <b>Smart</b>, <b>Measurable</b>, <b>Actionable</b>, <b>Relevant</b>, <b>Time-Oriented</b>)</i>	<i>Specific action items</i>	<i>Assign a time</i>	<i>Individual/org accountable</i>	<i>One year from now</i>
BST Formation (Formalize Team, Build Services Awareness, and Train BST Members) Forming to Storming	<ol style="list-style-type: none"> <li>1. Determine core BS team and referral partners. Invite partners to join the team</li> <li>2. Develop Team Charter, Mission, Vision, Values, MOU</li> <li>3. Fund Business Development</li> </ol>	<ol style="list-style-type: none"> <li>1. Ongoing: Discussed at April 2018 BST meeting. New members invited to June 2018 meeting.</li> <li>2. August 2018</li> <li>3. July 2018</li> <li>4. June 2018</li> </ol>	<ol style="list-style-type: none"> <li>1. SVWDB Business Development Manager</li> <li>2. SVWDB Business Development Manager and Team</li> <li>3. SVWDB Board, CEO, CFO</li> </ol>	<ol style="list-style-type: none"> <li>1. The team has engaged member representation from most partners</li> <li>2. The Charter, Mission, Vision and Values have been collaboratively developed and implementation has begun</li> <li>3. Business Development Manager and partners have developed a level of trust among team members</li> </ol>

What are our top 3 strategies?	How will we get there?	How long will this take?	Who's responsible?	How will we know we're successful?
	Manager 4. Conduct cross partner program business services training 5. Plan for business services training.	5. Fall 2018		
Functional Alignment (Conduct asset mapping, align resources) Storming to Norming	1. Identify services of each partner and prepare asset map 2. Conduct facilitated partner alignment sessions	1. Collect information in June 2018 and present draft at July 2018 meeting 2. Facilitated sessions July - September	SVWDB staff - Data and Communications Specialist, Business Development Manager	1. BST members are aware of the services offered by each partner and refer businesses to the appropriate team member for services 2. BST members have participated in the business services integration sessions, understand and have buy-in regarding partner coordination
Integrated Outreach (Develop materials and incorporate technology) Norming to Performing	1. Design and produce traditional outreach materials (Hard copy, PowerPoint) based on successful models. 2. Develop a mobile application to connect businesses to services 3. Develop an online orientation for businesses 4. Develop business podcasts	1. 4 months 2. 6 months - development process started April 2018 3. Fall 2018 4. Spring 2019	SVWDB Data and Communications Specialist, Business Development Manager	1. Materials are developed and being used successfully by BST members 2. Number of businesses served has increased

What are our top 3 strategies?	How will we get there?	How long will this take?	Who's responsible?	How will we know we're successful?
Customer Relationship Management (Partner Communication and business data) Performing	<ol style="list-style-type: none"> <li>1. Develop partner communication tool</li> <li>2. Conduct partner communication meetings</li> <li>3. Assess CRM systems being utilized by VA LWDAs</li> <li>4. BST CRM discussion and recommendation regarding next steps</li> <li>5. Board review and funding decision</li> </ol>	<ol style="list-style-type: none"> <li>1. April to implement in May</li> <li>2. Ongoing</li> <li>3. Ongoing</li> <li>4. Fall 2018</li> <li>5. Fall 2018</li> </ol>	SVWDB Data and Communications Specialist and Business Development Manager	<ol style="list-style-type: none"> <li>1. BST members are using tool to communicate between BST meetings</li> <li>2. BST members are participating in meetings</li> <li>3. LWDA CRM information has been assessed</li> <li>4. BST members have reached consensus regarding CRM vision and product recommendation</li> <li>5. Board decision regarding funding</li> </ol>
Seek Funding Implementation and Sustainability	<ol style="list-style-type: none"> <li>1. Investigate funding options</li> <li>2. Cost allocation with partners</li> <li>3. Develop grant proposals</li> </ol>	<ol style="list-style-type: none"> <li>1. Ongoing</li> <li>2. Summer 2018</li> <li>3. As funding opportunities are available</li> </ol>	<ol style="list-style-type: none"> <li>1. SVWDB staff and BST members</li> <li>2. BST member organizations</li> <li>3. SVWDB staff and BST members</li> </ol>	<ol style="list-style-type: none"> <li>1. Funding options have been identified</li> <li>2. Partners have agreed to a cost allocation method for the delivery of business services</li> <li>3. Proposals have been awarded</li> </ol>



## **Workforce Center Status Update May 10, 2018**

### **Harrisonburg Center**

- SVWDB is the leaseholder. Center is leased through Harrisonburg Housing Authority. Lease expires June 30<sup>th</sup> with two year term and 2% increase every two years.
- Center is ADA approved.
- All space is filled. It appears there is no room for additional partners. There should be a formal space utilization review to consider how staff space is used, how common space is used and the frequency of use.
- Goodwill is paying for space for two discretionary grants and uses the space as needed for grant staff and training.
- VEC is interested in the possibility moving additional staff into the Harrisonburg Center and decentralize from Fishersville.
- There is a new center manager, Tristin Meadows, she last served as the Career Specialist in the Harrisonburg Center. Melanie has moved to Regional Director of Workforce Development for Goodwill.
- Harrisonburg is a certified comprehensive one-stop workforce center.

### **Winchester Center**

- SVWDB is the leaseholder. Center is leased through North Cameron Properties, LLC, a related party to Our Health. Currently in the first year of a five year lease.
- Center is in the process of becoming ADA approved.
- All space is filled with SVWDB service provider staff, VEC staff, and Adult Education staff and representatives.
- We want to certify as a comprehensive one-stop center, but DARS will not agree to participate in a cost allocation agreement. This is still under discussion.
- Winchester Center will be certified as an affiliate center because they have two or more partners in the center.
- If participant and business events increase, there is limited space to host at the center, but there are numerous additional meeting rooms available to be scheduled on site through Our Health.
- Chuck Peacock is the Center Manager and is an employee of Goodwill Industries of the Valleys.

### **Fishersville Center**

- VEC owns the building and plans to close and will sell the property.
- SVWDB pays rent to VEC.
- When VEC moves, they plan to move staff between Fishersville and Harrisonburg, using Harrisonburg as the primary center for VEC staffing (this is subject to change).
- Center is not ADA approved and needs extensive building and parking lot modifications.

- Once the center has been relocated, it will be certified as an affiliate center.
- VEC is in the process of hiring a VEC Manager to be housed out of the Harrisonburg Center.
- Current SVWDB service provider staff do not have adequate office space and typically meet with clients at other off site locations.

#### **Luray Center**

- Currently lease space from LFCC.
- SVWDB service provider staff meet with all clients off site.
- SVWDB staff are working with the nonprofit Page One to move two case managers into their newly acquired main street location.
- SVWDB staff providing direction on the layout of space for the workforce center.
- Cost and next steps to be determined.
- Center will not be a comprehensive or affiliate site. The term for standalone centers has not been determined by the state.

#### **Rockbridge Center**

- Currently lease space from DSLCC.

## \$ by Economic Locality

Locality	AAI Grant
Other Virginia	\$ 255,721
Rockingham	\$ 161,343
Augusta	\$ 123,786
Harrisonburg	\$ 71,550
Waynesboro	\$ 42,400
Frederick	\$ 34,450
Shenandoah	\$ 29,150
Warren	\$ 13,250
Rockbridge	\$ 12,250
Winchester	\$ 10,600

TOTAL	\$ 754,647
SVWDB Total	\$ 498,926

## \$4 Million Amer. Apprenticeship Grant GOAL CURRENT

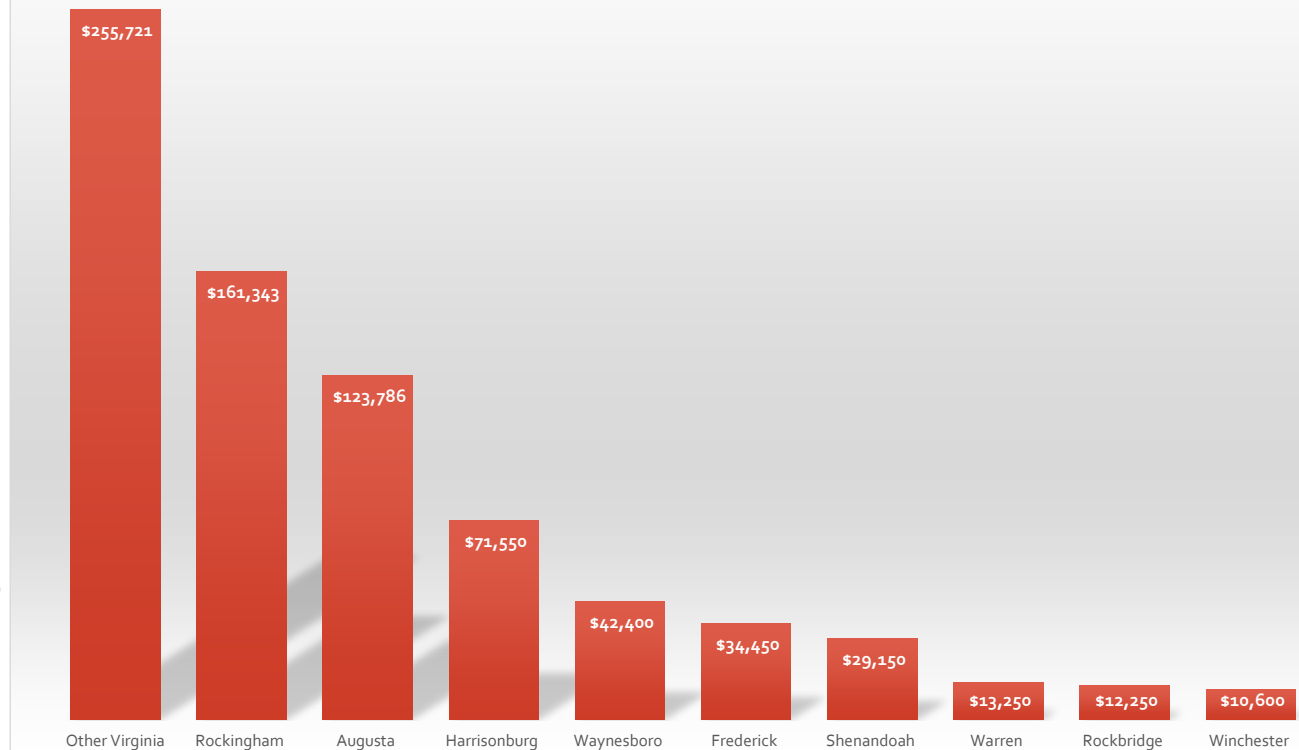
600 apprentices	334	56%
175 employers	62	35%
18 new programs	14	78%
37 expanded occupies	37	100%
150 target demographic	114	76%

34 apprentice occupations

Related Instruction provided by:

MTC, VCTC, LFCC, DSLCC, BRCC, CATEC, NCCER,  
ToolingU, BR Tech College WV, Penn Foster, In House

## Valley to Virginia American Apprenticeship Grant \$ Obligations to Businesses by Locality 3/31/2018



## Policy and Procedures

Title	Incentive Policy – Grant Addendum	Number	OP-14-01
Effective Date	May 1, 2018	Revisions	

### *V2V Policy Differences as compared to SVWDB Policy:*

#### **Purpose**

To establish guidelines for provision of incentives using funds from the V2V Grant.

#### **Policy**

Incentives may be provided to individuals enrolled in the V2V Grant to encourage successful participation in program activities and to recognize training and/or achievement of goals in the program without a client Individual Services Strategy or VA Workforce Connect System entry. Incentives will be in the form of a check, gift card, or a material item; under no circumstances may a participant be given cash.

#### **Procedure**

- 1) Programmatic Goals eligible for incentive payments to individuals may include:**
  - a. Successful completion of training program as evidenced by trainer or company.
  - b. Attainment of a credential as evidenced by trainer or copy of credential.
  - c. Securing employment as evidenced by the Employer.
  - d. Becoming a registered apprentice enrolled in the V2V Grant.
  - e. Completion of a registered apprenticeship program as evidenced by the Employer and/or the Virginia Department of Labor and Industry, Division of Registered Apprenticeship.
- 2) Documentation:**
  - a. V2V staff will document participant goal achievement and include with participant documentation. This documentation is justification for the incentive payment.
  - b. V2V staff must maintain an Incentive Tracking Log with participant signature acknowledging incentive receipt and V2V staff signature upon presentation.
- 3) Incentive Awards are limited to \$1000 per participant.**

#### **Waivers**

A waiver to the above policy and limitations may be requested on a case-by-case basis.

## Policy and Procedures

Title	Incumbent Worker Training Policy – Grant Addendum	Number	OP-14-02
Effective Date	May 1, 2018	Revisions	

### *V2V Policy Differences as compared to SVWDB Policy:*

#### **Purpose**

To establish guidelines for the use of V2V Grant funding to support registered apprenticeship training for incumbent workers who are enrolled in the V2V Grant. The Employer and the participant must meet all V2V grant eligibility and enrollment requirements.

#### **Policy**

V2V Grant funding will support training for enrolled participants according to the VDOLI approved Related Technical Instruction (RTI) for the Employer's registered apprenticeship program, plus any assessments (TABE, CRC, etc.) and any remedial training deemed necessary by the employer, instructors, or V2V staff. There will be no requirement for the employer to meet WIOA eligibility requirements including an aversion of layoff strategy.

#### **Procedure**

##### **1) Eligibility:**

- a. Training funds will only cover costs associated with an individual enrolled in the V2V Grant.
- b. V2V Staff will consider all other funding sources, including Vocational Rehabilitation, TANF, PELL Grants, WIOA ITAs, and GI Bill, to leverage funding.
- c. Occupational training must be included on the Employer's related technical instruction curriculum for their apprentices in that occupation. Remedial, soft skills, or supplemental training as it pertains to specific apprentices is not required to be itemized on the RTI.
- d. The V2V grant will not provide funding for programs previously funded by the V2V grant which were not successfully completed.

##### **2) Costs Eligible and Not Eligible for Training Reimbursement: *no changes***

##### **3) Cost Limitations and Match:**

- a. Employers will be reimbursed up to 100% of the eligible training costs for participants previously enrolled in a V2V pre-apprenticeship pre-hire training, or for supplemental training for individual participants, such as remedial or soft skills, as approved by the V2V Program Director.
- b. Employers will be reimbursed up to 90% of eligible training costs for a site with less than 50 employees, and up to 75% for a site with less than 100 employees as approved by the V2V Program Director.
- c. For those participants whose company does not pay for apprenticeship training, the V2V Grant will pay the training provider directly at the same reimbursement rates defined for employer reimbursement.
- d. The fiscal cap for training will be \$5000 per participant with no company cap.

#### **4) Documentation.**

- a. Each V2V Grant participant file must contain the Virginia DOLI apprenticeship registration forms and approved Related Technical Instruction curriculum.
- b. Each Employer file must contain an executed Employer Agreement.
- c. The employer must submit an Application for Grant Funds prior to the onset of requested training. Upon approval, V2V staff will issue a Commitment Letter specifying the amount of V2V grant funding approved for the training and procedures for obtaining reimbursement for eligible training expenses.
- d. The employer must submit a request for reimbursement of eligible training expenses including the invoice from the training provider identifying the participant(s) and specific training provided, along with proof of payment of that invoice.
- e. All reimbursements must be approved by the V2V Program Director.

#### **Waivers**

A waiver to the above policy and limitations may be requested on a case-by-case basis.

## Policy and Procedures

Title	Individual Training Accounts (ITA) – Grant Addendum	Number	OP-12-07
Effective Date	May 1, 2018	Revisions	

### *V2V Policy Differences as compared to SVWDB Policy:*

#### **Purpose**

To establish guidelines for V2V grant participants to obtain skills to become gainfully employed and to become a registered apprentice using funds from the V2V Grant.

#### **Policy**

V2V grant participants will be enrolled in training programs that align with registered apprenticeship curriculum or preparedness for employment and apprenticeship without a need-based assessment, labor market analysis, IEP or eligible training provider requirement, or an ITA process. The training must support the V2V grant purpose and be aligned with the approved V2V Grant Occupations. Costs associated with assessments (including TABE, CRC, or other similar assessments) will be treated as a training cost.

#### **Procedure**

##### **1) Eligibility:**

- a. Funds will only cover costs associate with an individual enrolled in the V2V Grant.
- b. V2V Staff will consider all other funding sources, including Vocational Rehabilitation, TANF, PELL Grants, WIOA ITAs, and GI Bill, to leverage funding.
- c. Occupational training will be designed to apply to related technical instruction within apprenticeship programs wherever possible.
- d. The V2V grant will not provide funding for programs previously funded by the V2V grant but not successfully completed.

##### **2) Cost Limitation:**

- a. Training cost per participant is limited to \$5000 within a fiscal year; grant funds cannot be used to pay participant wages; there is no combined cap for training and supportive services provided to a V2V grant participant.

#### **Waivers**

A waiver to the above policy and limitations may be requested on a case-by-case basis.

## Policy and Procedures

Title	Supportive Services – Grant Addendum	Number	OP-12-08
Effective Date	May 1, 2018	Revisions	

### *V2V Policy Differences as compared to SVWDB Policy*

#### **Purpose**

To establish guidelines for provision of supportive services using funds from the V2V Grant.

#### **Policy**

Participants enrolled in the V2V Grant may receive supportive services without a need-based analysis or justification as required in WIOA programs and defined in the SVWDB Policy.

“Service provider” and “program operators” are determined to be V2V Grant staff for purposes of administering this policy.

##### **1) Travel Allowance:**

- a. Reimbursement will be at the then current Internal Revenue Service issued standard mileage rate for business travel for actual mileage driven.

##### **2) Child Care: *no changes***

##### **3) Assistance with Training Uniforms, Work Attire, Books, and Related Tools:**

- a. The maximum assistance will be \$300 for training uniforms, safety shoes, and/or appropriate work attire, and \$1000 for training/work-related tools or supplies.

##### **4) Other:**

- a. Supportive services may include work site disability accommodations on a case-by-case basis.

##### **5) Limitations:**

- a. Supportive services are limited to no more than \$3500 per participant per fiscal year.
- b. Funding of training and supportive services will not have a combined fiscal year cap.

#### **Waivers**

A waiver to the above policy and limitations may be requested on a case-by-case basis.



## SHENANDOAH VALLEY REGION

The Virginia Career Works – Shenandoah Valley Region respectfully submits this request for funding to implement a unified branding initiative to increase awareness and use of the state’s workforce system, improve alignment and resource allocation, while improving service delivery to customers. The Virginia Career Works – Shenandoah Valley Region will work to advance the Virginia Career Works Brand to unify the Shenandoah Valley workforce system as outlined in the Brand Standards Manual, Virginia Brand Implementation Plan and as directed by Virginia Workforce Policy 30-07 and Virginia Workforce Letter No. 17-03.

Attached is the region’s Brand Implementation Plan, Brand Communication Plan, and Brand Implementation Budget to transition to full usage of the Virginia Career Works brand by the end of the performance period, September 3, 2018. All purchases made to implement the Virginia Career Works brand will comply with state and local board approved procurement policies and procedures as well as the Office of Management and Budget’s Uniform Guidance.

As outlined in the Virginia Career Works – Shenandoah Valley Region Brand Implementation Plan, the Shenandoah Valley Workforce Development Board will file with the Virginia State Corporation Commission and applicable local governments a fictitious name/doing business as Virginia Career Works – Shenandoah Valley Region and Virginia Career Works – *Regional Center Modifier* in the respective service localities.

\_\_\_\_\_  
Jeff Stapel, Chair, Shenandoah Valley Workforce Development Board

\_\_\_\_\_  
Date

\_\_\_\_\_  
Amity Mohler, County Administrator, Page County, Virginia  
Grant Recipient, Shenandoah Valley Workforce Development Board

\_\_\_\_\_  
Date

### AN EQUAL OPPORTUNITY EMPLOYER/PROGRAM

Virginia Career Works – Shenandoah Valley Region does not discriminate on the basis of race, color, religion, political affiliation, national origin, gender, marital status, sexual orientation, age, disability, or veteran’s status in its programs, activities or employment practices.

Auxiliary aids and services are available upon request to individuals with disabilities.

TDD: VA Relay Center: 711 or 800.828.1120

Virginia Career Works - Shenandoah Valley Region		
Brand Implementation Plan		
Activity	Date Due	Lead
<b>Implementation Funding Request</b>		
Solicit Cost Estimates	5/4/18	Joan Hollen
Develop Line Item Budget	5/4/18	Joan Hollen/Cathi Michie
Develop Local Implementation Plan	5/4/18	Joan Hollen
Submit Grant request to VCCS	5/11/18	Joan Hollen
<b>Brand Identity</b>		
DBA/Business Name Registrations	8/31/18	Cathi Michie
Web Domain Acquisition	Completed 4/24/18	Joan Hollen
<b>Brand Enculturation</b>		
Champion Recruited and Trained	Completed 4/12/18	
Develop local communication plan	4/27/18	Joan Hollen
SVWDB Staff Training	5/16/18	Joan Hollen
Center Staff and Partner Training-North	5/18/18	Joan Hollen
Center Staff and Partner Training-South	5/21/18	Joan Hollen
Board and Chief Elected Officials Review of Brand Implementation Plan	5/10/18	Joan Hollen
VCW Newsletter distribution to Board, Chief Elected Officials, staff, partner and stakeholders.	as follow up to training	Joan Hollen
<b>Communication Tools</b>		
Website transitioned to vcwshenandoahvalley.com	8/31/18	Immerge
Website content update to VCW brand	8/31/18	Joan Hollen/Karen Lawrence
Social media sites update to VCW brand	8/31/18	Karen Lawrence
Center promotional materials updated to VCW Brand	8/31/18	Joan Hollen
Outreach materials updated to VCW Brand	8/31/18	Joan Hollen
All internal documents and policies updated with new brand moving forward	8/31/18	Joan Hollen/staff
<b>ID Transition</b>		
Facility Signage in Place	8/31/18	Joan Hollen
Website Conversion to new URL	8/31/18	Immerge Technologies
Email Conversion to new URL	8/31/18	EN Computers
Digital signatures reflect new brand	8/31/18	Joan Hollen
Voicemail messages reflect new brand	8/31/18	Joan Hollen
Centers VCW Brand Local Media Launch	8/31/18	Joan Hollen
<b>Virginia Career Works - Shenandoah Valley fully implemented</b>	<b>9/3/18</b>	

## Virginia Career Works - Shenandoah Valley Region

### Communications Plan For Virginia Career Works Rebranding

Audience	Communication Objectives	Message	Channel	Timing	Lead
Local Brand Champion	Enculturation of brand through eLearning tool and facilitated training.	Virginia Career Works - Living the brand together.	In person training	5/12/18	VCCS/Joan Hollen
Board of Directors and Chief Elected Officials	Board of Directors and Chief Elected Officials receive an overview of the VCW brand, Implementation Plan and Budget with request for feedback.	Virginia Career Works is Virginia's vital link between meanful employment and growing business. Receive feedback and consensus on the local brand implementation plan and budget.	Email	5/7/18	Joan Hollen
Board of Directors and Chief Elected Officials	Board of Directors and Chief Elected Officials receive an overview of the VCW brand and transition strategy highlighting changes impacting the board. Receive approval of Board of Directors and Chief Elected Officials	Virginia Career Works is Virginia's vital link between meanful employment and growing business. VCW brand overview and explanation of changes impacting the board. Tips to promote the Virginia Career Works brand.	Joint meeting of the Board of Directors and Chief Elected Officials	5/10/18	Joan Hollen
SVWDB Staff	SVWDB staff trained on the eLearning presentation tool to understand, embrace and live the new brand.	Virginia Career Works - Living the brand together. Overview of Implementation Plan.	Internal staff training	5/16/18	Joan Hollen
Center Staff and Partners - North	Center Staff and Partners trained on the eLearning presentation tool to understand, embrace and live the new brand.	Virginia Career Works - Living the brand together. Overview of Implementation Plan. Q&A	In person training session	5/18/18	Joan Hollen
Center Staff and Partners - South	Center Staff and Partners trained on the eLearning presentation tool to understand, embrace and live the new brand.	Virginia Career Works - Living the brand together. Overview of Implementation Plan. Q&A	In person training session	5/21/18	Joan Hollen

Virginia Career Works - Shenandoah Valley Region  
Communications Plan For Virginia Career Works Rebranding

Audience	Communication Objectives	Message	Channel	Timing	Lead
Local Media	Inform local media of Virginia Career Works brand.	Unification of the Virginia Workforce System into a seamless system of agencies under the Virginia Career Works brand that advance economic growth by preparing and connecting individuals with Virginia businesses looking to hire and build a strong workforce.	State and Local Press Releases, centers media event	8/31/18	Karen Lawrence
Social Media (Customers, stakeholders, media)	Promote Virginia Career Works through social media channels.	Virginia Career Works is where I found the people and resources that got me where I wanted to go.	Facebook, Twitter, LinkedIn	Upon approval of local implementation plan and budget.	Karen Lawrence
Website (customers and stakeholders)	Rebrand website to reflect the Virginia Career Works Brand and update content.	Meaningful employment and a high quality of life for every Virginian and a qualified, job-ready workforce for Virginia Businesses.	Website	Upon approval of local implementation plan and budget.	Joan Hollen/Karen Lawrence
Virginia Career Works - Shenandoah Valley Region Newsletter	Use the established quarterly Virginia Career Works - Shenandoah Valley Region newsletter to preview new brand, generate interest in new brand and provide quarterly updates to stakeholders .	What identifies, develops, and connects a diverse, skilled talent pool with Virginia businesses; changes lives, and advances economic prosperity? Virginia Career Works: Coming soon to a workforce center near you.	Email distribution Board of Directors, Chief Elected Officials, employers, and partners	7/1/18	Karen Lawrence

Virginia Career Works - Shenandoah Valley Region  
Communications Plan For Virginia Career Works Rebranding

Audience	Communication Objectives	Message	Channel	Timing	Lead
Customers (employers and job seekers)	Increase customer awareness and knowledge of the Virginia Workforce System	A fresh, new resource to help business customers find, train and sustain their workforce talent. A clear and streamlined experience for job seekers that is convenient, quick, attentive and clear.	Pre-brand roll out signage at workforce centers introducing the new brand and providing assurances that they will find familiar faces and helpful programs but the visual identity of the workforce system will be different	7/1/18	Joan Hollen

Virginia Career Works - Shenandoah Valley Region				
Proposed Budget For Virginia Career Works Rebranding				Estimated
Category	Item to be Updated	Description	Vendor	Cost
<b>Communication Tools</b>				
Marketing Online	Social media transition to Virginia Career Works brand.	Update social media channels	KL Creative Media	
Marketing Online	Website transition to Virginia Career Works brand.	Change header/footer and button colors to match new brand.	Immerge Technologies	
Marketing Online	Web Content	Update web content to new brand	KL Creative Media	
Marketing Online	Cost of new URL	Purchased vcwshenandoahvalley.com plus .org and .net domains as recommended	GO Daddy	
Marketing Collateral	Replace Valley Workforce Folders	Print 1,000 folders with Virginia Career Works - Shenandoah Valley Region brand (graphic design not included)	McClung Companies	
Marketing Collateral	Business Cards	Replacement cards for all SVWDB and center staff	Mid Valley Press	
Marketing Collateral	Print centers brochures and flyers	Print in-house brochures and flyers to replace current center promotional materials	Joan Hollen	
Outreach Materials	5 Table Cloths	Solid Mask Navy	Commonwealth Promotional	
Outreach Materials	5 Table Runners	White with VCW logo	Commonwealth Promotional	
Outreach Materials	5 Pop Up Banners	Design and produce to new brand standards	Commonwealth Promotional	
Outreach Materials	Name tags	Name tag cost plus setup and shipping cost	Crystal Images	
<b>Total Communication Tools</b>				<b>\$8,500</b>
<b>Brand Identity</b>				
Legal Transition	Doing Business As (DBA)	Secure DBA for new brand	Lenhart Petit	
Legal Transition	SCC DBA Filing Fees	5 brands @ \$20	State Corporation Commission	
Legal Transition	Local DBA filing fees -centers	16 localities in LWDA 4 @ \$12.50 each	Localities in LWDA 4	
Legal Transition	Local DBA Filing fees - region	16 localities in LWDA 4 @ \$12.50 each	Localities in LWDA 4	
Local Media Launch	Press Release, social media distribution	Public Relations Campaign	KL Creative Media	
Local Media Launch	Workforce Center Media Event	Event coordinated with PR Campaign	Karen Lawrence	

Virginia Career Works - Shenandoah Valley Region				
Proposed Budget For Virginia Career Works Rebranding				Estimated
Category	Item to be Updated	Description	Vendor	Cost
<b>Total Brand Identity</b>				<b>\$1,200</b>
<b>ID Transition</b>				
Brand Identity	Migration to new URL	Change web url to vcwshenandoahvalley.com	Immerge Technologies	
Brand Identity	Migration to new email addresses	Change email addresses to _@vcwshenandoahvalley.com.	EN Computers	
Signage Conversion	Harrisonburg Center	Includes painted wall with white logo in entrance way to center.	Eddie Edwards Signs	
Signage Conversion	Winchester Center	Replace Valley Workforce window decal	Fast Signs	
Signage Conversion	Staunton Center	Replace Valley Workforce signage	Eddie Edwards Signs	
Signage Conversion	Rockbridge Center	Replace Valley Workforce signage	Eddie Edwards Signs	
Signage Conversion	Luray Center	Replace Valley Workforce signage	Fast Signs	
<b>Total ID Transition</b>				<b>\$15,300</b>
<b>TOTAL IMPLEMENTATION BUDGET REQUEST</b>				<b>\$25,000</b>

Form **990**

OMB No. 1545-0047

**Return of Organization Exempt From Income Tax**

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

- ▶ Do not enter social security numbers on this form as it may be made public.  
 ▶ Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

**2016****Open to Public Inspection**Department of the Treasury  
Internal Revenue Service

<b>A For the 2016 calendar year, or tax year beginning</b> Jul 1 , 2016, <b>and ending</b> Jun 30 , 2017				
<b>B</b> Check if applicable:  <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/> Initial return <input type="checkbox"/> Final return/terminated <input type="checkbox"/> Amended return <input type="checkbox"/> Application pending	<b>C Name of organization</b> SHENANDOAH VALLEY WORKFORCE DEVELOPMENT BOARD		<b>D Employer identification number</b> 54-1993339	
	Doing business as			
	Number and street (or P.O. box if mail is not delivered to street address) Room/suite		<b>E Telephone number</b> (540) 442-7134	
	P.O. BOX 869			
	City or town, state or province, country, and ZIP or foreign postal code			
HARRISONBURG VA 22803				<b>G Gross receipts</b> \$ 3,411,014.
<b>F Name and address of principal officer:</b> JEFF STAPEL P.O. Box 869 Harrisonburg VA 22803		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input type="checkbox"/> No If 'No,' attach a list. (see instructions)		
<b>I Tax-exempt status</b> <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) (insert no.) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(c)</b> Group exemption number ▶		
<b>J Website:</b> ▶ <a href="http://www.valleyworkforce.com">www.valleyworkforce.com</a>				
<b>K Form of organization:</b> <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other ▶		<b>L Year of formation:</b> 2000		<b>M State of legal domicile:</b> VA

**Part I Summary**

<b>Activities &amp; Governance</b>	<b>1</b> Briefly describe the organization's mission or most significant activities: <u>THE MISSION OF THE SVWDB IS TO: BUILD PARTNERSHIPS TO CREATE WORKFORCE OPPORTUNITIES THAT CULTIVATE BUSINESS, GROW JOBS, DEVELOP PEOPLE AND BUILD COMMUNITY.</u>			
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets.			
	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) . . . . .	<b>3</b>	36	
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) . . . . .	<b>4</b>	36	
	<b>5</b> Total number of individuals employed in calendar year 2016 (Part V, line 2a) . . . . .	<b>5</b>	11	
	<b>6</b> Total number of volunteers (estimate if necessary) . . . . .	<b>6</b>	24	
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 . . . . .	<b>7a</b>	0.	
<b>b</b> Net unrelated business taxable income from Form 990-T, line 34 . . . . .	<b>7b</b>	0.		
<b>Revenue</b>	<b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .		<b>Prior Year</b>	<b>Current Year</b>
			3,079,095.	3,365,970.
	<b>9</b> Program service revenue (Part VIII, line 2g) . . . . .			
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d) . . . . .		49.	70.
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e) . . . . .		7,849.	44,974.
	<b>12</b> Total revenue — add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .		3,086,993.	3,411,014.
<b>Expenses</b>	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1-3) . . . . .			
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .			
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) . . . . .		445,501.	487,150.
	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .			
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) ▶ 0.			
	<b>17</b> Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) . . . . .		2,641,492.	2,923,864.
	<b>18</b> Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) . . . . .		3,086,993.	3,411,014.
<b>19</b> Revenue less expenses. Subtract line 18 from line 12 . . . . .		0.	0.	
<b>Net Assets or Fund Balances</b>	<b>20</b> Total assets (Part X, line 16) . . . . .		<b>Beginning of Current Year</b>	<b>End of Year</b>
			607,401.	444,430.
	<b>21</b> Total liabilities (Part X, line 26) . . . . .		607,371.	444,400.
	<b>22</b> Net assets or fund balances. Subtract line 21 from line 20 . . . . .		30.	30.

**Part II Signature Block**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

<b>Sign Here</b>	Signature of officer		Date	
	JEFF STAPEL Type or print name and title		BOARD CHAIRMAN	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name		Preparer's signature	Date
	James E. Benson		James E. Benson	04/26/18
	Firm's name ▶ LARRY SAUNDERS & ASSOCIATES		Check <input type="checkbox"/> if self-employed	PTIN P00175791
	Firm's address ▶ 2902 CHAMBERLAYNE AVE RICHMOND VA 23222		Firm's EIN ▶ 20-0592958	Phone no. (804) 321-8512

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No**BAA For Paperwork Reduction Act Notice, see the separate instructions.**

TEEA0101 11/16/16

Form **990** (2016)