

# PARTNER WORK

The Workforce Development Board for the Pittsburgh Area



*Building a thriving workforce for the Pittsburgh region.*

Board of Directors' Briefing Book

**M a r c h 2 5 , 2 0 2 2**



David J. Malone  
Chair





## BOARD OF DIRECTORS

**David J. Malone, Chair**  
Chairman and CEO, Gateway Financial

**Acklin, Kevin**  
Vice President and Chief Counsel  
Pittsburgh Penguins

**Allen, Will**  
Managing Partner  
Magrac Ventures

**Barcaskey, Richard**  
Executive Director  
Constructors Association of Western PA

**Bullock, Dr. Quintin**  
President  
Community College of Allegheny County

**Caplan, Debra**  
Executive in Residence  
The Forbes Funds

**Casoli, Rich**  
President  
Beemac Trucking

**Coplan, David A.**  
Executive Director  
Human Services Center Corp.

**Dalton, Erin**  
Director, Allegheny County DHS

**Dozier, Clarence**  
Managing Director, Litigation  
FedEx

**Ellsworth, Laura**  
*Partner4Work Vice Chair*  
Partner in-Charge of Global Community Service  
Jones Day

**Gittlen, Ike**  
Representative  
United Steelworkers

**Gonzalez, Gabriella**  
Program Officer  
Richard King Mellon Foundation

**Harris, Carey**  
Chief Executive Officer  
Literacy Pittsburgh

**Holt, Tim**  
Senior Director Human Resources  
UPMC Insurance Services Division

**Katona, Marci**  
District Administrator  
Office of Vocational Rehabilitation

**Kelly, Darrin**  
*Partner4Work Secretary*  
President  
Allegheny/Fayette Central Labor Council, AFL-CIO

**Massaro, Steve**  
*Partner4Work Treasurer* President  
Massaro Construction Group

**McEvelly, Katherine**  
US Head of Human Resource, Vice President  
Covestro

**McLaughlin, Caitlin**  
Chief People Person  
LaFayette Square (*pending reappointment*)

**Melcher, Tom**  
Business Manager  
Pittsburgh Regional Building Trades Council

**Mendoza, Brandon**  
Executive Director  
NAIOP Pittsburgh

**Nobers, Jeff**  
Executive Director  
Builders Guild of Western PA

**Pipitone, Scott**  
President and CEO  
Pipitone Group

**Pollard, Joshua**  
President and CEO  
Omicelo

**Rendulic, Mark**  
Market President  
Citizens Bank

**Rupert, Duke**  
Chief Operating Officer  
Allegheny General Hospital

**Staszko, Frank**  
Assistant Regional Director  
PA Department of Labor and Industry, Bureau of Workforce Partnerships and Operations

**Thomas, John**  
Chief Financial Officer  
ECHO Realty

**Topoleski, Linda**  
Vice President, Workforce Operations and Programs  
Allegheny Conference on Community Development

**Washington, Dr. Nancy**  
Director, Allegheny Housing Rehabilitation Corporation

**Williamson, Sam**  
Chair  
Urban Redevelopment Authority  
Western PA Area Leader, 32BJ Service Employees International Union

## Partner4Work Board of Directors' 8:30 a.m. March 25, 2022

Via Zoom: <https://us02web.zoom.us/j/87209554814?pwd=UU0wa2Y1VkNOWlISWEZITFIiT203UT09>

### 1. Welcome and roll call

*David J. Malone, Chair*

### 2. General Business – Consent Agenda

- **APPROVE REVISED** Minutes from September 17, 2021, and Minutes from December 17, 2021.
- **APPROVE** Form 990 submissions for TRWIB, Inc. (dba Partner4Work) and RWC (supporting non-profit)
- **APPROVE** Revisions to WIOA Adult/Dislocated Worker Eligibility Policy
- **APPROVE** Revisions to the WIOA/TANF Youth Eligibility Policy
- **APPROVE** Revisions to WIOA Adult/Dislocated Worker/Youth Supportive Services Policy
- **ACCEPT** \$250,000 from the Eden Hall Foundation to support Policy and Research activities.
- **ACKNOWLEDGE** The actions taken by the Executive Committee since the last Full Board meeting.
  - **Accept REVISED** minutes from September 3, 2021<sup>1</sup>
  - **Accept** minutes from December 3, 2021
  - **Accept** minutes from the Feb. 15, 2022, Executive Session
  - **Accept** all funds since the last Executive Committee meeting
    - PA DLI Business Education Partnership- \$150,000
    - PA DLI PA Industry Partnership (Tech) - \$250,000
    - PA DLI PA Industry Partnership (Healthcare) - \$250,000
    - Cities for Financial Empowerment Summer Jobs Connect - \$20,000 planning grant for 2022 and \$50,000 implementation for 2023
  - **Approve** Contracts:
    - Early Childhood Education, Community College of Allegheny County, \$13,995
    - Early Childhood Education RA, Trying Together, \$117,825
    - Early Childhood Education, Literacy Pittsburgh, \$39,760
    - Employer Engagement, Keep It Simple, \$40,000
    - **Industry Recognized Training Program**
      - Pittsburgh A. Philip Randolph Institute, \$125,000
      - FortyX80, Inc., \$300,000
      - Resilient Coders, \$100,000
      - Per Scholas, Inc., \$100,000
    - **Learn & Earn Corporate**
      - Phase 4 Learning Center, Inc., \$254,906
    - **Learn & Earn (Application Support Centers)**
      - Auberle \$8,000
      - Bloomfield-Garfield Corporation, \$8,000
      - Boys & Girls Clubs of W PA, \$8,000
      - Carnegie Library of Pittsburgh, \$8,000
      - Goodwill of Southwestern PA, \$8,000
      - Focus on Renewal, \$8,000
      - Jewish Family & Community Services, \$8,000
      - Phase 4 Learning Center, Inc., \$8,000
      - Youth Enrichment Services, \$8,000

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<sup>1</sup> Minutes are available at <https://www.partner4work.org/uploads/revised-executive-committee-agenda-and-materials.pdf>

# PARTNER WORK

The Workforce Development Board for the Pittsburgh Area

- YouthPlaces, Inc., \$8,000
- Learn & Earn**
- Launchpad Careers, Inc., \$26,154.32
- CareerLink Move**
- Jones Lang LaSalle, \$43,000
- Career Services Expansion**
- Veterans Leadership Program of W PA, \$25,000
- Addendums**
- Auberle, \$8,500 increase (TANF)
- Auberle, \$79,700 increase (WIOA)
- Goodwill, \$30,050 increase (WIOA)
- Equus, \$35,308 increase (WIOA)
- DB Grant Associates, \$5,000 increase (CSBG)
- Dynamic Workforce Solutions, \$5,000 increase (CSBG/CDBG)
- Learn & Earn Providers**
- Allegheny County Department of Human Services (Braddock Youth Project/ Wilkinsburg Youth Project TBD)
- Auberle \$210,750
- Bloomfield Garfield Corporation \$224,800
- Boys & Girls Club of Western PA \$224,800
- Center That Cares \$112,400
- Communities in Schools \$140,500
- Community Empowerment Association \$98,350
- Kaiser Group, Inc. dba Dynamic Workforce Solutions) \$70,250
- Equus \$140,500
- Goodwill of Southwestern Pennsylvania, \$365,300
- Homewood Children's Village, \$351,250
- Jewish Family and Community Services, \$112,400
- Legacy Arts Project, \$154,550
- Neighborhood Learning Alliance, \$421,500
- Phase 4 Learning Center, \$421,500
- Pittsburgh Public Schools SOS, \$70,250
- Student Conservation Association, \$98,350
- Western Penn Hills Community Action, \$70,250
- Youth Enrichment Services (YES), \$238,850

**APPROVE** 2021 Audit for TRWIB, Inc., and RWC

**APPROVE:** Transfer \$200,000 from City Dislocated Worker 2020 to City Adult 2020; transfer \$400,000 from City Dislocated Worker 2021 to City Adult 2021; transfer \$300,000 from County Dislocated Worker to County Adult 2020.

**APPROVE** Revised Procurement and Program Income policies

### 3. Updates

- **Good Jobs Challenge**

*Susie Puskar, CPO*

### 4. Presentation and Discussion with BEAM Collaborative

*Will Allen and Joel Burstein*

**5. CEO Report**

*Rob Cherry, CEO*

**6. Other Business**

**7. Open Forum and Public Comment**

*Speakers are limited to three (3) minutes*

**8. Adjournment**

**Minutes of Partner4Work Board of Directors' Meeting**

8:30 a.m. September 17, 2021

(The full recording can be found at <https://youtu.be/34agar8r8o0>)

**Board Members Present**

Acklin, Kevin  
Barcaskey, Rich  
Bullock, Dr. Quinton B.  
Cooper, Mary Frances  
Coplan, David  
Croft, Tom  
Dalton, Erin  
Ellsworth, Laura  
Gittlen, Ike  
Harris, Carey  
Katona, Marci  
Lane, Majestic  
Malone, David  
McLaughlin, Caitlin  
Nobers, Jeff  
Pollard, Joshua  
Rupert, Duke  
Staszko, Frank  
Thomas, John  
Topoleski, Linda  
Washington, Dr. Nancy  
Williamson, Sam

**Board Members Absent**

Allen, Will  
Casoli, Rich  
Holt, Tim  
Kelly, Darrin  
Massaro, Steve  
Melcher, Tom  
Mendoza, Brandon  
Pipitone, Scott  
Rendulic, Mark

**Guests Present**

Acosta, Richard (Grant Associates)  
Higgins, Kiara (Dynamic Workforce Solutions)  
Moise, Elle (Grant)  
Lampman, Chester (Labor and Industry)  
Soster, Karen (Dynamic)  
Stanbro, Sean (Equus Workforce)

**Staff Present**

Caplan, Debra  
Cherry, Rob  
Kramer, Kristin  
Pajewski, Jennifer  
Puskar, Susie

**Board Meeting Minutes** *(The meeting is recorded and is available at YouTube.)*

Chairman Malone opened at 8:32 a.m. by announcing the meeting serves as the quarterly meeting of Partner4Work and the annual meeting of TRWIB, Inc. Roll was taken, and a quorum was present. Staff, board members, and guests were asked to acknowledge their participation in the chat feature.

Before moving on to regular business, Chairman Malone publicly acknowledged Deb Caplan, who served as interim CEO for a second time, and worked on the Committee to find and hire Rob Cherry.

**CONSENT AGENDA**

The Consent Agenda included:

- **APPROVE** Minutes from June 25, 2021
- **APPROVE** Near Completers and Supportive Services policies
- **ACKNOWLEDGE** The actions taken by the Executive Committee since the last Full Board meeting.
  - **Accept** minutes from March 12 and June 11
  - **Accept** \$50,000 from the Pittsburgh Penguins for the Lower Hill First Source initiative; \$5,000 from Key Bank and \$45,000 from Citizens Bank to support BankWork\$
  - **Add:** Rob Cherry as an authorized signer on contracts and P4W bank accounts
  - **Approve contracts:**

**Early Childhood Education**

Community College of Allegheny County                      \$23,325

**Pathways Home (Re-entry)**

Trade Institute of Pittsburgh                                      \$150,000  
Builders Guild of Western PA                                      \$150,000  
Work412 Professional LLC    \$150,000  
Landforce    \$150,000

**Near Completers**

Community College of Allegheny County                      \$1,493,431

**Provider Transition (EARN)**

Goodwill of Southwest PA    \$75,000  
Grant Associates, Inc.    \$75,000

**Career Services for Dislocated Workers**

Jewish Family & Community Services                      \$120,000

**Career Services Expansion (PACL)**

Grant Associates, Inc.    \$40,000  
Dynamic Workforce Solutions                                      \$80,000

**UPMC Pathways**

Dynamic Workforce Solutions                                      \$40,000

**MOUs**

Career Services Expansion (PACL)  
Goodwill of Southwest PA

Wilksburg Family Support Center  
Focus on Renewal  
Auberle  
Allegheny Valley Association of Churches  
Lower Hill Redevelopment First Source Center  
Urban League of Greater Pittsburgh

**There were no questions, and no one wished to discuss any item in more detail for separate treatment. Quintin Bullock and Jeff Nobers abstained. With no objections, the consent agenda passed as presented.**

### **FINANCE AND PERSONNEL**

CFO Kristin Kramer walked through the dashboard report included in the Board Book and displayed on the screen. Topics discussed included:

- Accounts payable
- Accounts receivable
- Liabilities
- Net assets
- Expenditures

CoS Jennifer Pajewski reviewed the current organizational structure, staff list, and staff demographics included in the Board Book. She commented that at any given time, P4W is recruiting for 2-3 positions. She encouraged Board members to send candidate referrals.

### **PROGRAMS**

Susie Puskar, chief program officer, led a conversation about WIOA performance outcomes and Good Jobs Challenge. She reported on:

- 2<sup>nd</sup> quarter after exit employment and earnings
- 4<sup>th</sup> quarter after exit employment and earnings
- Measurable skills gains
- Individuals electing to stay out of the workforce
- Efforts to improve job quality
- Improving neighborhood-based employment services
- Industry-recognized training programs
- Improvements of the one-stop system

Through the Good Jobs Challenge, with proposals due in January, P4W and its partners in Southwest Corner, Tri County, and Westmoreland-Fayette collectively propose workforce system advancement and employer-informed regional training systems. P4W intends to work with the Conference, labor, and employers in advance of the proposal.

### **LEARN & EARN and GOVERNANCE**

Deb Caplan, chair, provided a short report:

- Learn & Earn provided paid work experience for more than 1,400 young adults in 2021.
- Several young people who declined Learn & Earn found jobs with higher wages and more work hours in the open labor market.
- Learn & Earn enrollment numbers declined from previous years; however, teen employment overall was stronger in 2021
- 50 young people completed the corporate program.



In Governance, Deb Caplan reported:

- Efforts continue to identify private-sector individuals to recommend for nomination and appointment.
- Gaby Gonzalez of the Richard King Mellon Foundation
- A slate of year-end reappointment recommendations to present to appropriate nominating entities and the Mayor and County Executive for final appointment.
- Two ad-hoc committees are being considered including a stand-alone Human Resources Committee and a Communications Committee.
- Revisions to the Bylaws will be presented for consideration in December.
- A short Board questionnaire will be distributed by the end of the year.

### **Return-to-work discussion**

Based on a question Ike Gittlen posted in the chat, the group discussed reasons individuals are staying out of the workforce.

Susie Puskar discussed a survey from Indeed that revealed reasons individuals opt to stay out of the workforce including COVID fears, an employed spouse, financial cushion, child care responsibility, and unemployment benefits. The group discussed potentially conducting a survey asking individuals what would encourage them to return to the workforce and working with employers to find opportunities for pathways for workers.

### **CEO'S REPORT**

CEO Rob Cherry publicly thanked Deb Caplan for her leadership during the transition between March and July.

He also discussed:

- Diving deep into understanding programs, operations, and fiscal.
- Attending and participating in public-facing events including the BankWork\$ graduation, a Hospitality Event with the Mayor and County Executive, and a meet-and-greet with mayoral candidate Ed Gainey. A deeper conversation with Mr. Gainey will be held within the next 30 days.
- Meeting with Sheila Ireland, deputy secretary for workforce development.
- Reopening P4W offices on a hybrid model on October 4; staff will be expected to work in the office 40 percent of the time. P4W will revisit the model in January.
- Strategic Planning vendor selection is expected in early 2021 with a full five-year strategic plan expected by the end of the fiscal year. P4W will cast a national net for a facilitator/vendor to develop the plan.

### **OTHER BOARD BUSINESS**

Carey Harris, CEO of Literacy Pittsburgh, provided her annual report on Title II services. Her report included:

- Focus on middle-skill worker.
- 54,000 working age adults in Allegheny County do not have a high school diploma and 202,000 working age adults struggle with numeracy.
- 2,095 individuals served. 53 percent in college and career readiness and 47 percent in English language learning. Forty-eight percent had a postsecondary degree.
- 623 entered employment, 130 entered postsecondary training, 60 earned a high school equivalent, and 54 percent earned an educational level gain.

- Aligning digital skills and career services in construction, health care, and early childhood education.

Subsequent conversation focused on cross referrals and co-enrollment within the system and a description of the four core partners under WIOA.

**NEW BUSINESS**

None.

**PUBLIC COMMENT**

There was no public comment.

**On a motion by Dave Coplan, seconded by Ike Gittlen, the meeting adjourned at 10:07 a.m. There were no objections or abstentions.**

**Minutes of Partner4Work Board of Directors' Meeting and Annual Meeting of TRWIB, Inc.**

8:30 a.m. December 17, 2021

(The full recording can be found at <https://youtu.be/XSy3CDzxoYs>)

**Board Members Present**

Allen, Will  
Barcaskey, Rich  
Caplan, Debra  
Casoli, Rich  
Cooper, Mary Frances  
Coplan, Dave  
Dalton, Erin  
Dozier, Clarence  
Ellsworth, Laura  
Gittlen, Ike  
Gonzalez, Gaby  
Harris, Carey  
Holt, Tim  
Katona, Marci  
Malone, David  
McEvelly, Katherine  
McLaughin, Cat  
Nobers, Jeff  
Pipitone, Scott  
Pollard, Joshua  
Rendulic, Mark  
Rupert, Duke  
Staszko, Frank  
Topoleski, Linda  
Washington, Nancy  
Williamson, Sam

**Board Members Absent**

Acklin, Kevin  
Kelly, Darrin  
Massaro, Steve  
Melcher, Tom  
Mendoza, Brandon

**Guests Present**

Higgins, Kiara (Dynamic Workforce Solutions)  
Moise, Elle (Grant)  
Lampman, Chester (Labor & Industry)  
Nestor, Jennifer (Labor & Industry)  
Sostek, Karen (Dynamic)  
Stanbro, Sean (Equus Workforce)

**Staff Present**

Cherry, Rob  
Kramer, Kristin  
Kreit, Brian  
Long, Markese  
Pajewski, Jennifer  
Puskar, Susie

**Board Meeting Minutes** *(The meeting is recorded and is available at YouTube.)*

Chairman Malone opened at 8:32 a.m. by announcing the meeting serves as the quarterly meeting of Partner4Work and the annual meeting of TRWIB, Inc. Roll was taken, and a quorum was present. Staff, board members, and guests were asked to acknowledge their participation in the chat feature.

Before moving on to regular business, Chairman Malone publicly acknowledged Mary Frances Cooper, retiring president and CEO of Carnegie Library of Pittsburgh.

**CONSENT AGENDA**

The Consent Agenda included:

- **APPROVE** Minutes from September 17, 2021, and Minutes from December 11, 2020, annual meeting
- **APPROVE Industry-Recognized Training Program Contracts**
  - Fortyx80: Apprenti PGH. IT apprenticeship program. Up to \$300,000 for the period of 1/1/22 - 6/30/23 to serve 50 individuals.
  - APRI: Breaking the Chains of Poverty. Construction/energy-related occupational training. Up to \$125,350 for the period of 1/1/22 - 6/30/23 to serve 20 individuals.
  - Per Scholas: various IT training courses. Up to \$100,000 for the period of 1/1/22 - 6/30/23 to serve 20 individuals.
  - Resilient Coders: coding bootcamp. Up to \$100,000 for the period of 1/1/22 - 6/30/23 to serve 20 individuals.
- **APPROVE** P4W Follow-up Policy and P4W OJY Policy
- **ACKNOWLEDGE** The actions taken by the Executive Committee since the last Full Board meeting.
  - **Accept** minutes from September 3, 2021 (available at Partner4Work.org)
  - **Accept** all funds received from the Benevity Fund through June 30, 2022
  - **Accept** \$125,000 from the RK Mellon Foundation for tech-related training and employer engagement
  - **Approve** Revenue and Accounts Receivable and Program Income policies
  - **Approve contracts:**
    - Near Completers**
    - Grant Associates \$480,523
    - ARC Inspire**
    - PA Peer Support Coalition \$43,200
    - PSU/Beemac (Industry Partnership Training)\***
    - Penn State Beaver \$40,000
    - \*Note: Rich Casoli, president, Beemac, is a P4W Board member*
    - One-Stop Operator 6-months (January through June)**
    - Equus \$239,038

There were no questions, and no one wished to discuss any item in more detail for separate treatment. On a motion by Jeff Nobers, seconded by Sam Williamson, the motion passed. There were no objections. Rich Casoli abstained.

**GOVERNANCE**

Chair Deb Caplan welcomed and introduced new board members Clarence Dozier of FedEx, Gaby Gonzalez of RK Mellon Foundation, Tim Holt of UPMC, and Katherine McEvelly of Covestro. She also

informed the Board that Human Resources has been separated from Audit and Finance. Dave Coplan will chair the HR Committee. A short board self-assessment survey will be sent and participation would be

### **2022 Board and Executive Committee dates**

**Executive Committee** (8:30 to 10 a.m., virtually and in-person when possible)

- March 11, 2022
- June 10, 2022
- September 16, 2022
- December 2, 2022

**Full Board** (8:30 to 10 a.m., virtually and in-person when possible)

- March 25, 2022
- June 24, 2022
- September 30, 2022
- December 16, 2022

**On a motion by Dave Coplan, seconded by Duke Rupert, the 2022 Board and Executive Committee meeting dates were approved by unanimous vote. There were no objections or abstentions.**

### **Bylaws**

The Governance Committee proposed several revisions to the Bylaws to include language around the state system of record, Sunshine Law, attendance and term limits, and other revisions. The draft changes were vetted by Jennifer Nestor of Labor & Industry Oversight Services, and her recommended additions and corrections were incorporated. All the proposed changes were highlighted provided in advance. Sam Williamson requested one clarification about reappointments. The clarification will be added.

**On motion by Jeff Nobers, seconded by Sam Williamson, the Bylaws were approved by unanimous vote. There were no objections or abstentions.**

### **AUDIT FINANCE**

CFO Kristin Kramer walked through the dashboard report included in the Board Book and displayed on the screen. Topics discussed included:

- Accounts payable
- Accounts receivable
- Liabilities
- Net assets
- Expenditures

### **PROGRAMS**

Susie Puskar, chief program officer, reported on activity in the labor market:

- Pennsylvania's Labor Force Participation rate (LFPR) and US LFRP
- Accelerating retirement rates due to the pandemic
- Individuals between 25 and 54 in midst of strongest recovery on record
- Job quality issues are of highest importance to workers and job seekers
- Layoffs at nearly an all-time low, quits at an all-time high
- Leisure and hospitality drive the higher quit rate

- Unemployment initial claims and continued claims
- Black workers disproportionately represented in all unemployment figures; white workers returning to work more quickly
- Interventions needed to make up lost ground for older workers, disconnected youth, recent graduated, workers of color, and women

Subsequent conversation focused on interventions and other ways to create a holistic system with multiple entry points for job seekers and employers; connecting the immigrant community to the workforce system; identifying and motivating individuals not in the labor force to want to work; learning who is being rejected from the workforce; motivating young people early about work; poverty cliffs; needed public policy change; collecting data on freelance/1099 workers who also are collecting subsidies; the need to deep data mining by Partner4Work to break down the specific workforce challenges of the local population to inform lawmakers.

Through the Good Jobs Challenge, with proposals due in January and could bring \$25-\$30 million in EDA funding, P4W and its partners in Southwest Corner, Tri County, and Westmoreland-Fayette collectively propose workforce system advancement and employer-informed regional training systems. P4W intends to work with the Conference, labor, and backbone associations (such as business associations) on the proposal and if awarded, could rapidly accelerate the public workforce system.

### **CEO'S REPORT**

CEO Rob Cherry discussed:

- His enthusiasm with the conversation related to research and policy change. He articulated how complex the problems are facing workers, job seekers, and employers. He suggested conducting a public benefit impact analysis related to wages
- Speaking engagements and conferences include the Institute of Politics Elected Officials retreat; Ditchley Foundation; CAEL; Steamfitters with Jennifer Berrier, secretary of Labor & Industry; Citizens Bank panel presentation with Bruce Van Saun; Pittsburgh Business Times Skills Gap presentation; Pennsylvania Workforce Development Association.
- Stakeholder meetings with the Steamfitters, Master Builders, the Penguins, the Conference, InnovatePgh, and others.
- Homing in on a strategic vision for P4W in the coming years and rolling out the new vision to the Executive Committee during a special session in early 2022.
- Reopening of P4W offices in October 2021; staff is 100 percent vaccinated and return-to-work execution has been smooth and successful.
- PA CareerLink lease signed for a new Downtown location at 914-922 Penn Avenue

Chair Malone requested a special session to discuss vision and strategy to move forward.

### **OTHER BOARD BUSINESS**

Dave Coplan encouraged Board members to visit the new PA CareerLink center once opened.

### **NEW BOARD BUSINESS**

Ike Gittlen discussed PA CareerLink and the Unemployment Compensation system, particularly the ID.me verification system and the challenges presented to UC claimants. He called for connection and collaboration between PA CareerLink and the UC system to help individuals navigate the system. The group discussed the policy changes that could solve the challenges with UC faced at the local level.

**PUBLIC COMMENT**

There was no public comment.

On a motion by Dave Coplan, seconded by Debra Caplan, the meeting adjourned at 10:10 a.m. There were no objections or abstentions.

### **03(b) Program Income**

The Three Rivers Workforce Investment Board will follow program income guidelines as stated in Workforce System Policy (WSP) No. 03-2015, December 22, 2015, Chapter 3: Funding Distribution and Provisions. These policies will apply to all program income received by TRWIB Inc.

If Three Rivers Workforce Investment Board generates program income in the future, we will revisit this policy to detail out how it is generated, accounted for expended and reported.



## **04 Procurement Policy**

It is the policy of TRWIB Inc., dba Partner4Work (“P4W”) to follow a practice of transparent, ethical, economical, responsible, and reasonable procedures in all matters related to purchasing, agreements, contracts, and related forms of commitments. Partner4Work has developed this procurement policy in adherence with all established government mandated regulations and standards to control all purchases of goods and services and to encourage maximum levels of competition. Partner4Work employees and representatives will follow the policies detailed in this policy.

### **1.1 Definitions**

**BWDA** Bureau of Workforce Development Administration

**Contract (2 CFR 200.22)** a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award.

**Contractor (2 CFR 200.23)** an entity that receives a contract as defined in “Contract” above, also:

**Contractor (in relation to definition vs. subrecipient) (2 CFR 200.330)** A contract is for the purpose of obtaining goods and services for the non-Federal entity's own use and creates a procurement relationship with the contractor. See § 200.22 Contract. Characteristics indicative of a procurement relationship between the non-Federal entity and a contractor are when the contractor:

- (1) Provides the goods and services within normal business operations;
- (2) Provides similar goods or services to many different purchasers;
- (3) Normally operates in a competitive environment;
- (4) Provides goods or services that are ancillary to the operation of the Federal program; and
- (5) Is not subject to compliance requirements of the Federal program as a result of the agreement, though similar requirements may apply for other reasons.

(2 CFR 200.330 (c)) Use of judgment in making determination. In determining whether an agreement between a pass-through entity and another non-Federal entity casts the latter as a subrecipient or contractor, the substance of the relationship is more important than the form of the agreement. All of the characteristics listed above may not be present in all cases, and the pass-through entity must use judgment in classifying each agreement as a subrecipient or a procurement contract.

**Cost Analysis** is done for a subrecipient, and is the review and evaluation of the separate cost elements and profit or fee in an offeror's or contractor's proposal to determine a fair and reasonable price

**Cost Basis** is done for a vendor contract, and is an understanding of what a particular contract, service, or product cost is going to be based on background knowledge such as (but not limited to) previous or recently collected contract value or purchase price of said contract, service, or product.

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**Equipment (2 CFR 200.33)** tangible personal property (including information technology systems) having a useful life of more than one year and a per-unit acquisition cost which equals or exceeds the lesser of the capitalization level established by the non-Federal entity for financial statement purposes, or \$5,000.

**Federal Awarding Agency (2 CFR 200.37):** The Federal agency that provides a Federal Award directly to a non-Federal entity.

**Intangible Property (AKA Intellectual Property, or “IP”):** The Uniform guidance (§200.59) defines Intangible property as property having no physical existence, such as trademarks, copyrights, patents and patent applications and property, such as loans, notes and other debt instruments, lease agreements, stock and other instruments of property ownership (whether the property is tangible or intangible).

**Price Analysis** the process of examining and evaluating a proposed price without evaluating its separate cost elements or the proposed profit

**RFP** Request for Proposals, part of solicitation for a competitive procurement where justification of the awardee is based on a predetermined evaluative system / scorecard that is released as part of the RFP, and a formal RFP committee is required to grade the proposals based on said evaluative system. <sup>1</sup>

**RFQ** Request for Quote, part of solicitation for a supplier or contractor that requires two or more quotes (otherwise it may qualify as sole source- 1.6.6) where a justification is made in writing as to which one is selected and why. No formal committee or evaluative criteria is needed and the justification can be based on any one or a combination of cost, value, or quality. <sup>2</sup>

**Subaward (2 CFR 200.92)** an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract.

**Subgrant** a subaward using only private funding.

**Subrecipient (2 CFR 200.330)** a non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of

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<sup>1</sup> Note that these definitions for RFP and RFQ are defined by P4W in an effort to unify internal vernacular and better comply with federal, state, and local procurement policy

<sup>2</sup> See footnote above

such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency.

Characteristics which support the classification of the non-Federal entity as a subrecipient include when the non-Federal entity:

- (1) Determines who is eligible to receive what Federal assistance;
- (2) Has its performance measured in relation to whether objectives of a Federal program were met;
- (3) Has responsibility for programmatic decision making;
- (4) Is responsible for adherence to applicable Federal program requirements specified in the Federal award; and
- (5) In accordance with its agreement, uses the Federal funds to carry out a program for a public purpose specified in authorizing statute, as opposed to providing goods or services for the benefit of the pass-through entity

**Supplies (2 CFR 200.94)** Supplies means all tangible personal property other than those described in §200.33 Equipment. A computing device is a supply if the acquisition cost is less than the lesser of the capitalization level established by the non-Federal entity for financial statement purposes or \$5,000, regardless of the length of its useful life. See also §§200.20 Computing devices and 200.33 Equipment.

**TANF** Temporary Assistance for Needy Families

**WIOA** Workforce Innovation and Opportunity Act

## **1.2 Conflict of Interest**

P4W (Partner4Work) has a Conflict of Interest policy, signed by the board, P4W Handbook 103, which all employees must sign. AnyRFP/RFQ evaluators must also complete Conflict of Interest declarations.

## **1.3 Non-Discrimination Policy**

An employee, representative, contractor, or subrecipient conducting procurement on behalf of or in association with P4W shall maintain an Equal Employment and Non-Discrimination Policy that complies with their grant award requirements. P4W shall adhere to their internal policies in the P4W Handbook, sections 501, 502, and 503.

## **1.4 Whistleblower/No Retaliation Policies**

P4W maintains a policy to protect Whistleblowers, Partner4Work Handbook policy 504. Employees may report any suspected violations of procurement policies, regulations, or conflicts of interest internally, through public officials, or directly to funding agencies in accordance with this provision. To report fraud, waste and abuse in government agencies/programs, call 1-855-FRAUD-PA (1-855-372-8372).

## **1.5. Additional Requirements**

**1.5.1 Consideration of Minority, Small, Women-Owned, Veteran-Owned, and Disabled Veteran-Owned Businesses; and Businesses in Labor Surplus Areas (2 CFR 200.321 and State Financial Guide )**

Steps will be taken to assure that minority or women-owned, small businesses, labor surplus area businesses, and veteran-owned businesses are used when possible. These steps are:

- A. Placing qualified small businesses; minority, veteran, service-disabled-veteran-owned businesses and women's business enterprises on solicitation lists;
- B. Assuring that small businesses; minority, veteran, service-disabled-veteran-owned businesses and women's business enterprises are solicited whenever they are potential sources;
- C. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises;
- D. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- E. Using the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce; and
- F. Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed in paragraphs (1) through (5) of this section.

**1.5.2 Prohibited Contracts (2 CFR 200.216)**

No telecommunication device contracts will be extended to Huawei Technologies Company, ZTE Corporation, Hytera Communications Corporation, Hangzhou Hikvision Digital Technology Company, Dahua Technology Company, and any of their many subsidiaries or affiliates

**1.6 Purchasing Process and Authorization Levels**

The procurement process and the approvals required at each level are summarized below.

<b>Procurement Levels</b>			
<b>Procedure</b>	<b>Value of Purchase</b>	<b>Required Approval</b>	<b>Form</b>
Micro-purchase	\$0-2,999.00	Supervisor and Fiscal	Purchase Request
Small Purchase	\$3,000 to \$49,999.99 and if	P4W Officer Level; two independent quotes/bids required.	Procurement Request

	required by funding		
RFP/RFQ Process	\$50,000 to \$149,999 and if required by funding	P4W Officer Level and Follow RFP/RFQ Process	Procurement Request
RFP/RFQ Process	\$150,000 or higher	Follow RFP/RFQ Process	Procurement Request
Equipment	Equipment totaling \$5,000 each or in aggregate	Prior Federal or BWDA approval (as appropriate), CFO	Procurement Request

All contracts utilizing federal, state, or local grant funding must be approved by Partner4Work’s Executive Committee and included on the consent agenda for the Full Board of Directors.

All contracts in excess of \$250,000 utilizing private funding must be approved by Partner4Work’s Executive Committee and included on the consent agenda for the Full Board of Directors.

Any contract directly benefiting a Partner4Work board member, a former board member, or former employee must be approved by Partner4Work’s Executive Committee and included on the consent agenda for the Full Board of Directors.

**1.6.1 General Guidelines to Evaluate Contractor/Sub Recipients**

Alternative contractor/sub recipients shall be evaluated on a weighted scale that considers the following criteria:

- A. Adequacy of the proposed methodology of the contractor/sub recipient;
- B. Skill and experience of key personnel;
- C. Demonstrated company experience;
- D. Other technical specifications (designated by department requesting proposals);
- E. Compliance with administrative requirements of the request for proposal (format, due date, etc.);
- F. Contractor/sub recipient’s financial stability;
- G. Contractor/sub recipient’s demonstrated commitment to the nonprofit sector;
- H. Results of communications with references supplied by contractor/sub recipient;
- I. Ability/commitment to meeting time deadlines;
- J. Cost;

- K. Minority, women-owned business, labor surplus area, veteran owned, or small diverse business (sdb is for state contracts only) status of contractor/sub recipient; and
- L. Other criteria (to be specified by department requesting proposal).

Not all of the preceding criteria may apply in each purchasing scenario. However, in each situation requiring consideration of alternative contractor/sub recipients, the department responsible for the purchase shall establish the relative importance of each criterion prior to requesting proposals and shall evaluate each proposal on the basis of the criteria and weighting that have been determined. In following Commonwealth policy, if the lowest cost contractor/sub recipient is not selected, Partner4Work will provide sufficient justification.

After a contractor/sub recipient has been selected and approved by the department director, the final selection shall be approved by the CEO and the Executive Committee and included for approval on the Board consent agenda.

All contracts involving board members, former board members, or former employees as owners, officers, or board members of an offeror must be approved prior to signing by the Partner4Work's Executive Committee.

### **1.6.2 Micro-Purchase Policy**

Procurement by micro-purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold for the funding source. To the extent practicable, Partner4Work will distribute micro-purchases equitably among qualified suppliers. Micro-purchases may be awarded without soliciting competitive quotations if Partner4Work considers the price to be reasonable.

### **1.6.3 Small Purchase Policy**

Small purchase procedures are those relatively simple and informal procurement methods for securing services, supplies, or other property that do not cost more than the Simplified Acquisition Threshold as defined in 2 CFR Part 200, or State Procurement Thresholds. If small purchase procedures are used, price or rate quotations must be obtained from an adequate number of qualified sources, with a minimum of two required, written quotes.

### **1.6.4 RFP/RFQ Policy**

The technique of competitive proposals is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded. It is generally used when conditions are not appropriate for the use of sealed bids.

If this method is used, the following requirements apply:

- A. Purchases must be approved by the CEO and an additional C-level representative of Partner4Work;
- B. Written cost/price estimates are required in advance for each RFP \$150,000 or higher;
- C. RFPs \$150,000 or higher must be advertised for at least 30 days and in two places, one of which must be the Partner4Work website, by the Communications Department **with the**

- exception of Goods and Services; RFP's/RFQ's \$50,000 to \$150,000 must at a minimum be advertised on the P4W website;
- D. Goods and Services are required to be advertised for a lesser period, at least 14 days and are only required to be advertised on Partner4Work's website; These items have standardized pricing and are not commonly negotiated.
  - E. Any deviation to this or any other policy herein requires written approval of the Executive Committee of the Board of Directors;
  - F. RFP's/RFQ's must be sent to all appropriate entities on the Partner4Work bidder list and identify all evaluation factors and their relative importance;
  - G. Any response to requests for proposals or quotes must be considered to the maximum extent practical;
  - H. Proposals must be solicited from an adequate number of qualified sources;
  - I. Bidders conferences may be held at the discretion of P4W for RFP's;
  - J. Bidder Questions will be answered in a public format at least one week before the bid due date;
  - K. An evaluator list will be developed and approved before bids are due;
  - L. Evaluators will complete a conflict of interest form prior to participating in the process. When a conflict of interest is identified, an evaluator shall not assess a proposal in which they have the conflict;
  - M. RFP's/RFQ's over \$50,000 will require at least 3 evaluators;
  - N. RFP's over \$500,000 will require at least 5 evaluators;
  - O. Evaluators will be given adequate time to evaluate bids;
  - P. A risk assessment of each bidder will be completed and included in the evaluation criteria;
  - Q. Contracts will be awarded to the responsible provider(s) whose proposal(s) is(are) most advantageous to the program, with price and other factors considered; and
  - R. Unsuccessful and successful bidders will be notified in writing within two weeks of the decision;
  - S. A debrief of an unsuccessful bidder may be requested and may be performed at the discretion of P4W.

**1.6.5 Sealed Bids** Procurement by sealed bids (formal advertising). Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) is awarded to the responsible bidder whose bid, conforming with all the material terms and conditions of the invitation for bids, is the lowest in price. The sealed bid method is the preferred method for procuring construction. Make sure to follow all federal, state, and local policy regarding small and diverse business solicitation.

- A. In order for sealed bidding to be feasible, the following conditions should be present:
  - (i) A complete, adequate, and realistic specification or purchase description is available;
  - (ii) Two or more responsible bidders are willing and able to compete effectively for the business; and
  - (iii) The procurement lends itself to a firm fixed price contract and the selection of the successful bidder can be made principally on the basis of price.

B. If sealed bids are used, the following requirements apply:

- (i) Bids must be solicited from an adequate number of known suppliers, providing them sufficient response time prior to the date set for opening the bids, for local, and tribal governments, the invitation for bids must be publicly advertised;
- (ii) The invitation for bids, which will include any specifications and pertinent attachments, must define the items or services in order for the bidder to properly respond;
- (iii) All bids will be opened at the time and place prescribed in the invitation for bids, and for local and tribal governments, the bids must be opened publicly;
- (iv) A firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder. Where specified in bidding documents, factors such as discounts, transportation cost, and life cycle costs must be considered in determining which bid is lowest. Payment discounts will only be used to determine the low bid when prior experience indicates that such discounts are usually taken advantage of; and
- (v) Any or all bids may be rejected if there is a sound documented reason.

**1.6.6 Noncompetitive Proposals (Sole Source)** Procurement by noncompetitive proposals is procurement through solicitation of a proposal from only one source and may be used only when one or more of the following circumstances apply:

- A. The item is available only from a single source; or
- B. The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation; or
- C. The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the non-Federal entity; or
- D. After a complete and rigorous solicitation of a number of sources, competition is determined inadequate.

**1.6.7 Equipment** Equipment purchased with federal or state pass-through monies will adhere to uniform guidance provisions in 2 CFR 200.313, 2 CFR 200.439, and any applicable state, WIOA, DOL or funder regulations specific to that contract.

Equipment and other capital expenditures charged to Federal awards will be subject to certain additional policies as described below:

For purposes of Federal award accounting and administration, "equipment" will include all assets with a unit cost equal to the lesser of \$5,000 or the capitalization threshold utilized by Partner4Work, which is currently \$5,000.

All purchases of "equipment" with federal funds will be approved in advance in writing by the federal or State awarding agency. In addition, the following policies will apply regarding equipment purchased and charged to federal or state awards:



1. Any equipment that is owned by the Federal government and given to Partner4Work for use in a program will be marked as such;
2. Adequate insurance coverage will be maintained with respect to equipment and capital expenditures charged to Federal awards;
3. Approve or disapprove all lower tier requests for the purchase of property in accordance with the applicable requirements. Copies of all approvals and WIOA (or local) tag number(s) assigned must be maintained at the grantee/fiscal agent's office and made available for review by authorized representatives. For sub grantee purchases with a unit acquisition cost of \$5,000 or more, the grantee/fiscal agent must obtain the BWDA's approval;
4. If property was purchased using WIOA funding, notify the BWDA of excess property with a unit acquisition cost of \$5,000 or more;
5. Establish a control system that will safeguard all property against loss, damage or theft; and
6. Maintain policies and procedures for leasing or renting non-expendable personal property;
7. Each lower tier sub grantee is responsible for establishing and maintaining an adequate system of property management. That system must adhere to all applicable requirements, including those of the grantee/fiscal agent from which funding is received. The lower-tier sub grantee must also identify and safeguard all property acquired with said funds.
8. A physical inventory of all equipment purchased with federal funds will be performed annually by the Operations Department as necessary. The results of the physical inventory will be reconciled to the accounting records of state and federal reports filed by Partner4Work.

**1.6.8 Intellectual Property** and how it is handled depends on the funding source used to create it. In some cases it may be prudent to contractually mandate that no IP will be generated as a result of the contract in order to avoid IP disputes with external entities. See below for how to deal with IP as relates to specific funding streams.<sup>3</sup>

- **Pennsylvania State:** According to the PA state financial management guide, all Intellectual property created as a result of PA monies must be open source and licensed under Creative Commons.
- **Direct Federal:** From the uniform guidance (§200.59, §200.315) exclusive rights to IP created with these monies can legally be given to the entity that created it. For very specific line item fiscal constraints see the above UG references. In addition to UG, The Bayh Dole Act permits businesses (large and small) and nonprofits (including universities) to retain ownership of the inventions (including IP) made under federally funded research and contract programs, *while*

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<sup>3</sup> If you are ever in doubt of how any money can be spent, there is always a grant or project officer that is the official representative of the funder whose role is (among other things) to answer any expenditure or compliance related questions.

also giving the government the license to practice the subject invention. Current P4W contract template language references this act appropriately.

- **Private or Foundation:** These are specific to the grant agreement in question. That said it is very rare to have IP restrictions with private or foundation dollars.

**1.6.9 Contract Requirements** Partner4Work is required to enter into contracts for goods and services when certain criteria are met. Below are guidelines for determining when a contract is required. Consult with the Contracts Management department if further clarification is necessary. All other purchasing procedures still apply.

GUIDELINES FOR DETERMINING WHEN A CONTRACT IS REQUIRED					
<b>NO Contract Required</b>	One single delivery of service	Most goods purchased under \$3,000	Not project/program related	No performance outcomes	Services less than \$3000 (in total by project or projects)
<b>Contract Required</b>	Multiple deliveries of service	Most goods purchased over \$3,000	Related to project/program	Performance outcomes required	Services totaling more than \$3000 (in total by project or projects)

All contracts are approved at the Partner4Work C-level. Contracts are not considered approved until they are executed with the CEO's or CSO's signature.

**1.7 Contract Cost and Price (2 CFR 200.323)**

1. Partner4Work will perform a cost or price analysis in connection with every procurement at the RFP Policy level, including contract modifications. The method and degree of analysis will be dependent on the facts surrounding the particular procurement situation, but as a starting point, Partner4Work will make independent, documented estimates before receiving bids or proposals and retain records of these estimates.

2. Where applicable, Partner4Work will negotiate profit as a separate element of the price for each contract in which there is no price competition and in all cases where cost analysis is performed. To establish a fair and reasonable profit, consideration will be given to the complexity of the work to be performed, the risk borne by the contractor, the contractor's investment, the amount of subcontracting, the quality of its record of past performance, and industry profit rates in the surrounding geographical area for similar work.
3. Costs or prices based on estimated costs for contracts under the Federal award are allowable only to the extent that costs incurred or cost estimates included in negotiated prices would be allowable for Partner4Work under Subpart E – Cost Principles-of the Uniform Administrative Guidance 2 CFR Part 200. Partner4Work may reference its own cost principles that comply with the Federal cost principles.
4. The cost plus a percentage of cost and percentage of construction cost methods of contracting are not allowable.

### **1.8 Procurement Review (2 CFR 200.324)**

1. Partner4Work will make available, upon request by the Federal awarding agency or pass-through entity, technical specifications on proposed procurements where the Federal awarding agency or pass-through entity believes such review is needed to ensure that the item or service specified is the one being proposed for acquisition.
2. Partner4Work will make available upon request, for the Federal awarding agency or pass-through entity pre-procurement review, procurement documents, such as requests for proposals or invitations for bids, or independent cost estimates when the circumstances detailed in 200.323(b) apply.
3. Partner4Work is exempt from the pre-procurement review if the Federal awarding agency or pass-through entity determines that its procurement systems comply with this part.
  - a. Partner4Work may request that its procurement system be reviewed by the Federal awarding agency or pass-through entity to determine whether its system meets these standards in order for its system to be certified. Generally, these reviews must occur where there is continuous high-dollar funding, and third-party contracts are awarded on a regular basis.
  - b. Partner4Work may self-certify its procurement system. Such self-certification must not limit the Federal awarding agency's right to survey the system. Under a self-certification procedure, the Federal awarding agency may rely on written assurances from Partner4Work that it is complying with these standards. Partner4Work must cite specific policies, regulations, or standards as being in compliance with these requirements and have its system available for review.

### **1.9 Bonding Requirements (2 CFR 200.325)**

For construction or facility improvement contracts or subcontracts exceeding the Simplified Acquisition Threshold, the Federal awarding agency or pass-through entity may accept the bonding policy and requirements of the non-federal entity provided that the Federal awarding agency or pass-through

entity has made a determination that the Federal interest is adequately protected. If such a determination has not been made, the requirements of 200.325(a) – (c) must be followed.

### **1.10 Contract Provisions (2 CFR 200.326)**

Partner4Work contracts must contain the applicable provisions described in 2CFR Appendix II to Part 200 – “Contract Provisions for non-Federal Entity Contracts Under Federal Awards”.

- Scope of work describing the good(s) and/or service(s) being procured;
- Federal and state employer’s tax identification number and nature of the company (non-profit, profit, local government);
- Certifications, assurances, clauses, and conditions required by USDOL, state, or local policies;
- Required budget;
- State of financial, capability-certified financial statements or single A-133 audit report;
- Required performance measures;
- Reporting requirements;
- Applicability and compliance with required statute and/or regulations;
- Equal Employment Opportunities;
- Copeland Anti-Kickback Act;
- Davis Bacon Act;
- Compliance with all applicable standards, orders, or requirements issued under the Clean Air Act, Clean Water Act, and the Environmental Protection Agency regulations for contracts/grants exceeding \$150,000;
- Mandatory standards and policies relating to energy efficiency that are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act;
- Patent rights;
- Copyrights and rights to data;
- Byrd Anti-Lobbying Amendment; and
- Debarment and suspension and integrity requirements.
- Administrative, contractual, or legal remedies for violations, default, and/or breach of contract;
- Termination for cause and for convenience;
- Ownership and access to records and retention requirements;
- Audit requirements;
- Access by the grantee, federal, and state personnel or any of their duly authorized representatives to any books, documents, papers, and records of the contractors that are directly pertinent to that specific contract for the purpose of making audit, examination, excerpts, and transcriptions; and
- Modifications.

### **1.11 Subrecipient and Contractor Determinations (2 CFR 200.330)**

Partner4Work will make a case-by-case determination whether each agreement it makes for the disbursement of Federal program funds casts the party receiving the funds in the role of a subrecipient or a contractor (see Subrecipient and Contractor in the Definitions section of this policy). In determining whether an agreement between Partner4Work and another non-Federal entity casts the latter as a subrecipient or a contractor, the substance of the relationship is more important than the form of agreement. Partner4Work will use judgment in classifying each agreement as a subaward or a procurement contract. In compliance with 2 CFR 200.330.

## **1.12 Post–Award Administration (WORKFORCE SYSTEM POLICY (WSP) No. 03-2015, Chapter 10)**

Partner4Work will provide technical assistance to all sub recipients when appropriate and upon request of a sub recipient. Partner4Work will also provide programmatic monitoring, careful analysis of performance, and the review of documentation and reports.

## **1.13 Closeout (2 CFR 200.343)**

Partner4Work will close-out federal or pass through award when it determines that all applicable administrative actions and all required work of the have been completed using the following time-line and steps:

1. No later than 90 calendar days after the end date of the period of performance, all financial, performance, and other reports as required by the terms and conditions of the award will be submitted. If this is not possible, an extension will be requested.
2. Partner4Work will liquidate all obligations incurred under the award not later than 90 calendar days after the end date of the period of performance as specified in the terms and conditions of the award.

Partner4Work will promptly refund:

- any balances of unobligated cash that were paid in advance to Partner4Work by the government
  - any monies paid out to subs or contractors that P4W was not authorized to give
  - any monies used on projects not previously authorized by the funder
  - See OMB Circular A-129 and see § 200.345 Collection of amounts due for requirements regarding unreturned amounts that become delinquent debts.
3. Consistent with the terms and conditions of the award, Partner4Work must make a settlement for any upward or downward adjustments to the Federal or state share of costs after closeout reports are received.
  4. Partner4Work will account for any real and personal property acquired with Federal funds or received from the Federal Government in accordance with §§ 200.310 (Insurance coverage) through 200.316 (Property trust relationship) and 200.329 (Reporting on real property).
  5. Partner4Work will complete all closeout actions for Federal and state awards no later than one year after receipt and acceptance of all required final reports.

## **1.14 Procurement File Standards – Record Retention (2 CFR 200.333)**

Partner4Work will maintain records and files for all large purchases and shall include at a minimum: a) the basis for subrecipient selections; b) justification for lack of competition when competitive bids or offers are not obtained; and c) a cost or price analysis. Procurement records will be retained for seven (7) years after final payment on a contract and all other matters are closed. Records shall detail the significant history of procurement. These records may include, but are not necessarily limited to, the following:

1. Identification of Service or Goods;

2. Cost Estimate;
3. Proof of Publication;
4. Proof of Attempts at Identification of Potential Providers;
5. Request for Proposal Package;
6. Bidder's Conference Publication, Agenda, and Minutes;
7. Responses to Requests for Proposal;
8. Evaluation of Responses;
  - a. Evaluation Sheets with Scoring
  - b. Conflict of Interest Signed Forms for Outside Evaluators
  - c. Any Communications Concerning Bids
  - d. Recommendations by Evaluators
9. Requests for Additional Information;
10. Related Correspondence;
11. Letters of Status Determination;
12. Recommendations by Staff;
13. Risk Assessment;
14. Determinations by Board of Directors or Committees;
15. Justification for lack of competition when competitive bids or offers are not obtained
  - a. Sole Source Checklist
  - b. Cost/Price Analysis.

In addition, Partner4Work Board of Directors meeting agendas, records of actions, and minutes will be retained permanently.

Records of any contract under dispute or legal challenge will be retained until the dispute is entirely resolved.

### **1.15 Delivery of Career Services-Adult and Dislocated Workers [WIOA Sec. 134(c)(2)(C)]**

Career services described in WIOA Section 134(A) for eligible workers shall be provided through the one-stop delivery system: 1. Directly through one-stop operators identified pursuant to section 121(d), or 2. Through contracts with service providers (subrecipients), which may include contracts with public, private for-profit, and private nonprofit service providers, approved by the local board.

### **1.16 Training Contracts [WIOA Sec. 134(c)(3)(G)(ii)]**

- A. Training services authorized under this paragraph may be provided pursuant to a contract for services in lieu of an individual training account (ITA) if:
  - i. The Consumer Choice Requirements [WIOA Sec. 134(c)(3)(F)] are met;
  - ii. Such services are on-the-job training (OJT), customized training, incumbent worker training or transitional employment;
  - iii. Partner4Work determines there are an insufficient number of eligible providers of training services in the local area involved to accomplish the purposes of a system of individual training accounts;

- iv. Partner4Work determines that there is a training services program of demonstrated effectiveness offered in the local area by a community-based organization or another private organization to serve individuals with barriers to employment;
- v. Partner4Work determines that
  - a. It would be most appropriate to award a contract to an institution of higher education or other eligible provider of training services in order to facilitate the training of multiple individuals in in-demand industry sectors or occupations; and
  - b. Such contract does not limit customer choice; or
  - c. The contract is a pay-for-performance contract.
- B. Training services must be directly linked to an in-demand industry sector or occupation in the Allegheny County region or the planning region, or in another area to which an adult or dislocated worker receiving such services is willing to relocate, except that Partner4Work may approve training services for occupations determined by the board to be in sectors of the economy that have a high potential for sustained demand or growth in the Allegheny County region [WIOA Sec. 134(c)(3)(G)(iii)]
- C. Nothing in this paragraph shall be construed to preclude the combined use of individual training accounts (ITAs) and contracts in the provision of training services, including arrangements that allow individuals receiving ITAs to obtain training services that are contracted this clause [WIOA Sec. 134(c)(3)(G)(iii)].

**1.17 Selection of Eligible Providers of Youth Workforce Investment Activities**  
**(WIOA Sec. 107(d)(10)(B) and Sec. 123)**

- A. Partner4Work shall award grants or contracts on a competitive basis to providers (subrecipients) of youth workforce investment activities based on the criteria in the State plan (including such quality criteria as the Governor shall establish for a training program that leads to a recognized postsecondary credential), and taking into consideration the ability of the providers to meet performance accountability measures based on primary indicators of performance for the youth program as described in WIOA Section 116(b)(2)(A)(ii) and in WIOA section 102(b)(2)(D)(i)(V), based on the recommendations of the youth standing committee; and
- B. Shall conduct oversight with respect to such providers.
- C. Exceptions: Partner4Work may award grants or contracts on a sole source basis if Partner4Work determines there is an insufficient number of eligible providers of youth workforce investment activities in the Allegheny County region involved for grants and contracts to be awarded on a competitive basis.
- D. Consistent with [section 123](#), Partner4Work may terminate for cause the eligibility of such providers (subrecipients).

**1.18 Selection of One-Stop Operators [WIOA Sec. 121(d)]**

Partner4Work, with the agreement of the chief elected officials, is authorized to designate or certify one-stop operators and to terminate for cause the eligibility of such operators. To be eligible to receive funds made available under this subtitle to operate a one-stop center, an entity:

- A. Shall be designated or certified as a one-stop operator through a competitive process; and
- B. Shall be an entity (public, private, or nonprofit), or consortium of entities (including a consortium of entities that, at a minimum, includes 3 or more of the one-stop partners described in subsection 121(b)(1)), of demonstrated effectiveness.

Partner4Work will ensure that in carrying out activities under this title, one-stop operators:

- A. Disclose any potential conflicts of interest arising from the relationships of the operators with particular training service providers or other service providers;
- B. Do not establish practices that create disincentives to providing services to individuals with barriers to employment who may require longer-term services, such as intensive employment, training and education services; and
- C. Comply with Federal regulations, and procurement policies, relating to the calculation and use of profits.

### **1.19 Grievance and Complaint Procedures**

Disputes arising out of any procurement conducted by Partner4Work shall be settled at the lowest level of protest as agreed upon by the protesting agent and in accordance with the Partner4Work Grievance/Complaint Process. Under this process, WIOA staff, program applicants, participants, recipients of grant awards, contracts, labor unions, service providers, etc., may file complaints alleging violations of the Act, or other federal and state rules. Complaints under this process must be in writing and must adhere to the timelines specified. Complaints for the process must be submitted to:

Partner4Work

Attention: Partner4Work, CEO

Email: admin@partner4work.org

Complaint

Complaints may be filed with the CEO and appealed to the Partner4Work Board of Directors Chairman or his/her designee within 180 days of the award date.

### **1.20 Suspension and Debarment (2 CFR part 180)**

Non-federal entities and contractors are subject to the non-procurement debarment and suspension regulations implementing Executive Orders 12549 and 12689, as well as all terms and conditions in 2 CFR 2900. These regulations restrict awards, subawards, and contracts with certain parties that are debarred, suspended, or otherwise excluded from or ineligible for participation in federal assistance programs or activities. Partner4Work will also adhere to any state, state agency, or other restrictions concerning subcontractors(vendors) and sub-recipients as applicable to individual subawards.

#### **1.20.1 PA State Integrity Provision**

For PA state funded contracts there is an additional integrity provision that subrecipients of said funding must comply with. This provision, outlined in management directive 215.8



## **1.21 WIOA Specific Regulations**

For the expenditure of WIOA funds, Partner4Work will adhere to all WIOA specific procurement rules and guidance as set forth in:

- A. Workforce Innovation and Opportunity Act (Pub. L. 113-128). July 22, 2014.
- B. Workforce Innovation and Opportunity Act (“DOL WIOA Final Rule”), at 81 FR 56072. August 19, 2016.
- C. WIOA Joint Rule for Unified and Combined State Plans, Performance Accountability, and the One-Stop System Joint Provisions (“WIOA Joint Final Rule”), at 81 FR 55791. August 19, 2016.
- D. Office of Management and Budget (OMB) CFR Chapter II, Part 200, et al. Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards: Final Rule. December 26, 2013.
- E. Workforce Innovation and Opportunity Act (121(d)(2)(A)) and as set forth in U.S. Department of Labor TRAINING AND EMPLOYMENT GUIDANCE LETTER WIOA NO. 15-16, dated January 17, 2017.

Partner4Work will also adhere to any State specific WIOA [policies and directives](#) WIOA funding.

## **1.22 TANF Specific Regulations**

Partner4Work will also adhere to any State specific TANF [policies and directives](#) for state pass-through TANF funding.

## **1.23 Program Specific Guidelines**

Partner4Work will adhere to Program Specific funding guidelines not already specified including federally funded program requirements

## **1.24 Purchases that will be charged to programs funded with federal awards are subject to the additional policies listed below**

- A. Partner4Work will avoid purchasing items that are not necessary for the performance of the activities required by a Federal award or any other activity of the organization.
- B. Where appropriate, an analysis will be made of lease and purchase alternatives to determine which would be the most economical and practical procurement for the Federal government. This policy is not needed if there are no funds available for purchases, in which case leasing will be the only choice

## **1.25 Compliance with Laws, Regulations and Provisions of Awards**

Partner4Work recognizes that as a recipient of private, State and Federal funds, the Organization is responsible for compliance with all applicable laws, regulations, and provisions of contracts and grants. To ensure that the Organization meets this responsibility and allocates funds appropriately, the following policies will be applied with respect to every grant or contract received directly or indirectly from a State and Federal agency. (Private funding grants will be reviewed on a case by case basis for requirements):

- A. Read each award and prepare a summary of key compliance requirements and references to specific laws and regulations.
- B. Review the OMB Uniform Guidance for compliance requirements unique to the award and for compliance requirements common to all awards.
- C. Review the section of the Catalog of Federal Domestic Assistance applicable to the award.
- D. Identify and communicate any special changes in policies and procedures necessitated by awards as a result of the review of each award.
- E. Contracts Management will take all reasonable steps necessary to identify applicable changes in laws, regulations, and provisions of contracts and grants. Steps taken in this regard will include, but not be limited to, reviewing subsequent grant and contract renewals, and reviewing annual revisions to the OMB Uniform Guidance Compliance Supplement.”
- F. The CEO will facilitate any communications with Federal awarding agency personnel. The CEO may choose to delegate this responsibility.

### **1.26 Monitoring of Sub recipients**

When Partner4Work utilizes Federal funds to make sub-awards to sub recipients, Partner4Work is subject to a requirement to monitor sub recipients based on the results of a risk assessment, in order to provide reasonable assurance that sub recipients are complying, in all material respects, with laws, regulations, and award provisions applicable to the program.

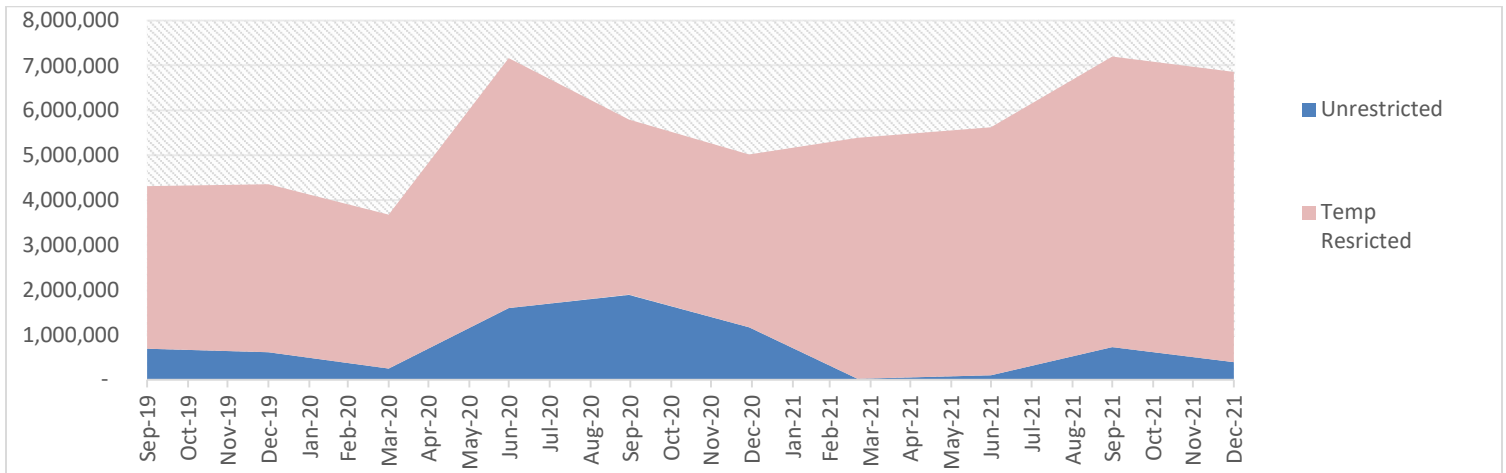
In fulfillment of its obligation to monitor sub recipients, the following policies apply to all sub-awards of federal funds made by Partner4Work to sub recipients:

- A. Sub-award agreements will include all information necessary to identify the funds as federal funding. This information will include:
- B. The applicable Catalog of Federal Domestic Assistance (CFDA) title and number
  - i. Award name
  - ii. Name of Federal agency
  - iii. Amount of award
  - iv. Period of performance
  - v. Scope of work
- C. Sub-award agreements will identify all applicable audit requirements, including the requirement to obtain an audit in accordance with OMB Uniform Guidance, if the sub recipient meets the criteria for having to undergo such an audit.

- D. Sub-awards will include a listing of all applicable Federal requirements that each sub recipient must follow.
- E. Sub-awards will require that sub recipient employees responsible for program compliance obtain appropriate training in current grant administrative and program compliance requirements.
- F. Sub- awards will require that sub recipients submit financial and program reports to Partner4Work on a basis no less frequently than monthly or as defined in the contract.
- G. Partner4Work will follow- up with all sub recipients to determine whether all required audits have been completed. Partner4Work will cease all funding of sub recipients failing to meet the requirement to undergo an audit in accordance with OMB Uniform Guidance. For sub recipients that properly obtain an audit in accordance with OMB Uniform Guidance, Partner4Work will obtain and review the resulting audit reports for possible effects on Partner4Work accounting records or audit.
- H. Partner4Work Compliance Department monitors subrecipients based on the results of their risk assessments, on an ongoing basis, during the period of performance by each subrecipient. A system for the ongoing monitoring of the sub recipient shall be established. The Director of Compliance will maintain a manual identifying the procedural requirements of the monitoring process.
- I. Ongoing monitoring of sub recipients by Partner4Work will inherently vary from sub recipient to sub recipient, based on the nature of work assigned to each sub recipient. However, ongoing monitoring activities may involve any or all of the following
  - i. Regular contacts with sub recipients and appropriate inquiries regarding the program.
  - ii. Reviewing programmatic and financial reports prepared and submitted by the sub recipient and following up on areas of concern.
  - iii. Monitoring sub recipient budgets.
  - iv. Performing site visits to the sub recipient to review financial and programmatic records and assess compliance with applicable laws, regulations, and provisions of the sub-award.
  - v. Offering sub recipients technical assistance where needed.
  - vi. Maintaining a system to track and follow up on deficiencies noted at the sub recipient in order to assure that appropriate corrective action is taken.
  - vii. Establishing and maintaining a tracking system to assure timely submission of all reports required of the sub recipient.
- J. Documentation will be maintained in support of all efforts associated with Partner4Work's monitoring of sub recipients.

# Dashboard Report

## Cash Flow Unrestricted and Temp Restricted Funds



## Current Assets, Liabilities & Equity

### Cash:

Temp Restricted \$6,469,337

Unrestricted \$393,032

**Total Cash \$6,862,369**

### Line of Credit secured by Money Market

\$0 of \$500,000

### Other Current Assets

Prepaid Expenses \$33,134

Prepaid Insurance \$10,373

Security Deposit \$6,067

Fixed Assets Net of Depreciation \$140,444

### Liabilities

A/P \$4,140,954 (\$4,091,582 due to subrecipients)

PA Unclaimed Property \$1,309

Accrued Vacation \$75,577

Deferred Rent \$0

A/R Clean Up \$ 128,927

### Equity

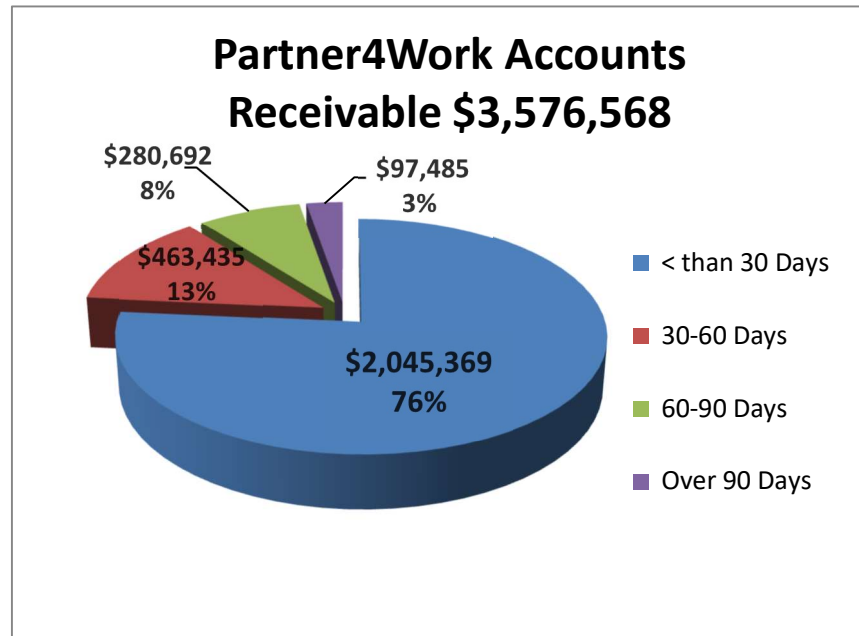
Unrestricted Net Assets \$898,489

Temp Restricted Net Assets \$7,888,245\*\*

Net Income (\$2,500,769)

\*\*Career Link \$136,878; M&G \$2,733; Sector Strat. \$899,751; Adult TANF \$3,666,349; L&E \$3,182,533

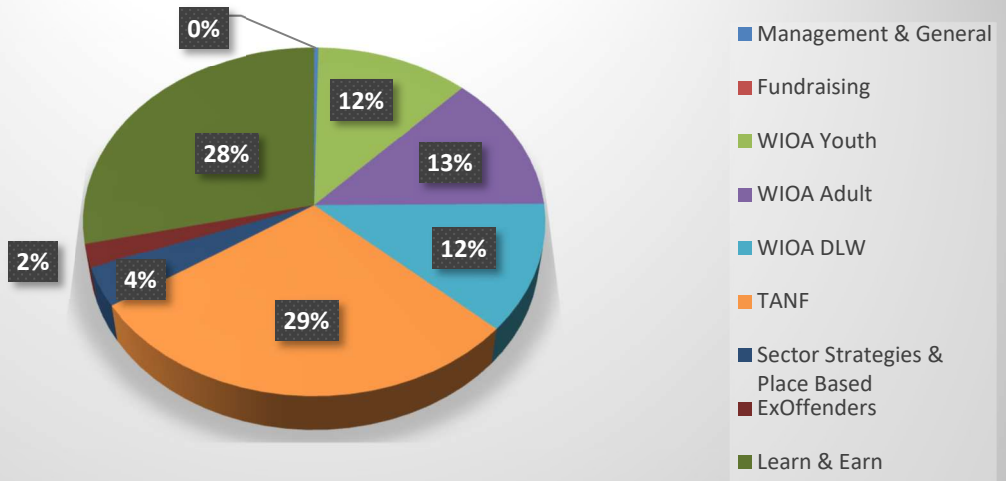
This is reflective of activity through 7/1/2021



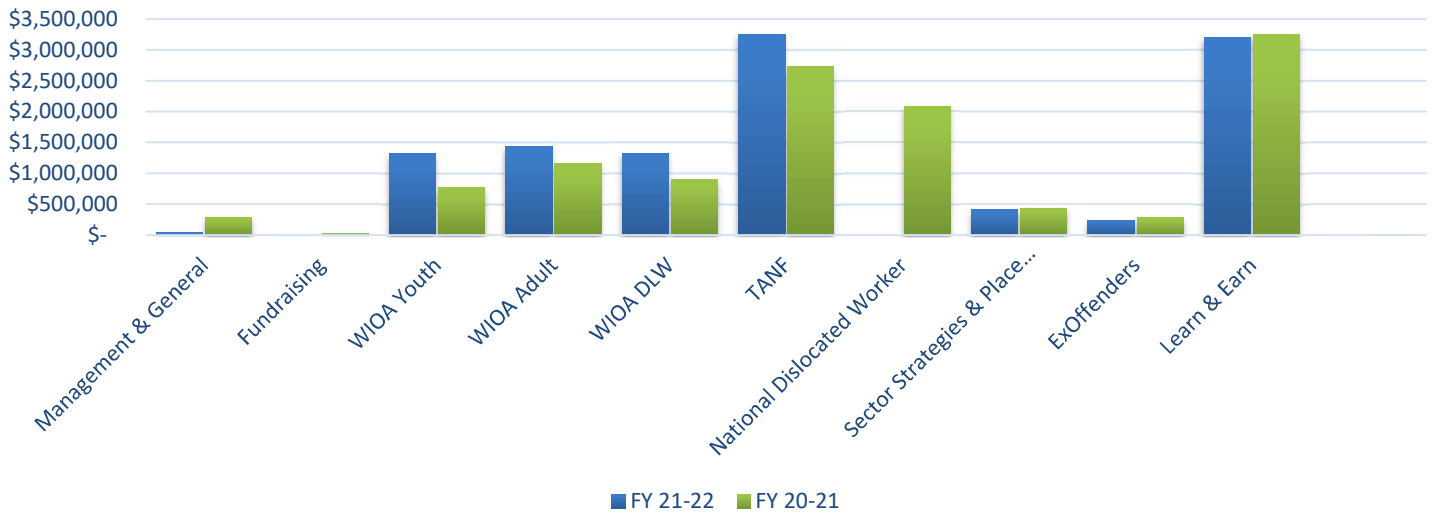
Items over 90+ days: Employ Milwaukee \$97,485

**Expense section**

**Total Partner4Work Expenditures \$11,231,239**



**Expense Comparison FY 21-22 vs. 20-21**



**Comments**

- Management & General has a balance of about \$36K, primarily related to the reimbursement of leasehold improvements from KPP (\$33K). Last fiscal year we had the Paycheck Protection Loan for \$242,377 and the Pittsburgh Passport Program for \$30,000.
- WIOA Youth is \$550K above prior year. Providers were timelier in submitting invoices this fiscal year vs. prior year. I believe the impact we saw during COVID reduced spending in prior year across the board.
- WIOA Adult is \$270K above prior year and WIOA Dislocated Worker is \$422K above prior year. We have added additional Industry Recognized Training Program (IRTP) contracts to enhance our training portfolio. Additionally, we have increased our level of outreach and communications to job seekers in order to drive enrollment levels.
- TANF funding is \$526K more than last year. EARN and WR providers spent more money in the first half this year vs. prior year. Again, COVID played a large part in the reduced spending in prior year.
- National Dislocated worker is \$2M below prior year. The program ended March 31, 2021. This variance will continue to grow until we arrive at March 31, 2022.

## Program and Strategy Updates

### *Programs for Adults*

**PA CareerLink<sup>®</sup>** continues to offer in-person workforce development services to job seekers and employers from career centers in Downtown Pittsburgh and Forest Hills, as well as newly developed partnership sites in community locations throughout Allegheny County (see Career Services Expansion below). In addition to in-person services, PA CareerLink continues to offer a full range of workforce development services to job seekers and employers remotely. The lessons learned from building virtual platforms, increasing access to training programs, and developing new strategic partnerships during the pandemic will keep driving progress for PA CareerLink and its partner agencies.

The Adult and Dislocated Worker programs operated through **PA CareerLink<sup>®</sup>** registered more than 1,300 new participants and assisted in securing more than 600 job placements out of 780 exits in the year ending June 30, 2021, despite the difficult challenges of the COVID-19 Pandemic. In all, nearly 25,000 people in Allegheny County created new accounts with PA CareerLink<sup>®</sup> in PY20-21. The labor market has strengthened considerably since early 2021 and recruitment of job seekers into all programs has posed challenges. In the current program year, for the period from July 1, 2021 to January 31, 2022, PA CareerLink<sup>®</sup> has registered approximately 900 new participants in Adult and Dislocated Worker programs and helped job seekers obtain 400 jobs to date.

The **Career Services Expansion Project** expands the reach of PA CareerLink<sup>®</sup> services in targeted neighborhoods across the city and county, utilizing new and existing networks of community-based organizations to refer unemployed and underemployed area residents for workforce services. PA CareerLink<sup>®</sup> Career Navigators conduct in-person services five days per week at 15+ community-based host sites, meeting people in their neighborhoods to engage in recruitment, enrollment, and delivery of career services. These Career Navigators are also participating in community event-based recruitment efforts to get the word out about PA CareerLink<sup>®</sup> services. Six PA CareerLink<sup>®</sup> computer stations have been placed at host sites in target neighborhoods to serve people where they are by providing access to technology to complete employment services activities and enable virtual meetings with Career Navigators. This pilot will be expanded upon in June with nine additional computer stations installed for use at new partner sites.

The **Industry Recognized Training Program (IRTP)** has entered its second year of operation, providing access for job seekers to quality vocational training to prepare for good paying jobs in high-demand occupations. Training focus areas include web development, IT security and maintenance, CDL preparation, emergency medicine,

advanced manufacturing, construction, and more. Partner4Work began IRTP in November 2020, in close partnership with PA CareerLink<sup>®</sup> and various training partners, including UPMC, Tech Elevator, NuPaths, the Builders Guild, All State, Phase 4, CMU, and New Century Careers. Since then, more than 200 job seekers have participated. Based on the early success of IRTP, Partner4Work issued a second RFP to identify quality occupational programs to be included in the IRTP portfolio, expanding the breadth of opportunities available to job seekers and employers. Recent program additions coming from the RFP include Per Scholas, APRI's Breaking the Chains of Poverty, Fortyx80's Apprenti program, and Resilient Coders.

Work with the Community College of Allegheny County continues on the **Near Completers Demonstration Project (NCDP)**. The focus of this project is to develop new approaches to connect job seekers who previously dropped out of higher education and who were affected by the covid-19 pandemic. By supporting rapid credential attainment that qualifies the job seeker for work in high priority occupations, participants will be immediately able to enter the job market and earn family sustaining wages in their field of study. NCDP will support job seekers who have been displaced from employment due to the COVID-19 pandemic and who were within two semesters of completing training. NCDP is off to a slow start; eligibility for the grant is narrow. Grant activities must be completed by June 30, 2023.

Partner4Work issued new service delivery contracts for the **EARN and Work Ready programs**, beginning July 1, 2021, resulting from a competitive procurement conducted in the spring. EARN and Work Ready programs provide case management, career services, supportive services, job placement and retention services to clients of Temporary Assistance to Needy Families (TANF) and the Supplemental Nutrition Assistance Program (SNAP) in Allegheny County. Under the new contract structure, EDSI, Goodwill, and Grant Associates continue to serve as the primary EARN and Work Ready service providers in Allegheny County. EARN enrollments have begun to grow from very low levels seen during the covid-19 pandemic. In the current program year, for the period from July 1, 2021 to February 28, 2022, EARN and Work Ready programs have enrolled over 300 new participants. Enrollments are driven almost exclusively by referrals from the County Assistance Office (CAO).

The **Pathway Home** program provides career services, occupational training, transitional employment, and comprehensive case management to 100 adults 18 and older exiting the Allegheny County Jail. Participants will begin receiving services while incarcerated, including occupational training and employment planning activities, and transition to additional training and career and supportive services after release. Funded by a DOL Reentry Employment Opportunities grant in partnership with Midwest Urban Strategies, Partner4Work is one of three grantees in the MUS Reentry Network. Due to pandemic safety measures restricting access to and movement within the Jail, enrolling and serving individuals residing in the primary jail facility has

continued to be challenging. In September 2021, DOL approved expanding eligibility to individuals granted work release and living in facilities outside the jail. To date, 32 individuals have been enrolled in the program. MUS plans to ask for a grant extension to meet project goals.

#### *Programs for Young Adults and Youth*

The **Career Pipeline Program for Justice-Involved Young Adults**, operated by the Auberle Employment Institute and funded by a Youth Reentry grant from the PA Department of L&I, is in its second and final year of implementation and will serve participants through June 30, 2022. The target population for this project includes young adults with dual system involvement in the criminal justice and foster care systems. After a delayed start in 2020 to state restrictions to curb the spread of COVID-19, Partner4Work has exceeded almost all performance outcomes, including credential attainment and employment placements, and have begun over-enrolling to maximize community benefit of the grant. Program participants are engaged in GED preparation, legal services, career readiness activities, and vocational training with providers including the Builder's Guild and Professional Training Associates, Inc. Auberle has been particularly successful in working with the Allegheny Health Network to screen justice-involved candidates for entry into the AHN Nursing Assistant Academy, a paid training-to-employment pipeline for entry-level nursing assistants who are then paired with on-the-job mentors.

**Year Round Youth Programs** are currently serving 947 young people (478 WIOA and 469 TANF) through the work of 14 providers across the County and City. TANF programs have exceeded enrollment goals for the year and are 112% enrolled. WIOA programs have enrolled 94% of their total capacity, a reflection of the shift in the administration of WIOA youth programs to maintain open enrollment through the program year. These programs, too, will be able to over-enroll, provide youth eligibility and suitability is determined and provider outcome data are strong. Other areas of focus this program year are building intentional bridges between youth workforce programs and the Allegheny County Department of Human Services Programs, adult services offered through PAEL and industry partners, and strengthening case management strategies.

The **Business Education Partnership 3** project is a collaboration between Partner4Work, the City of Pittsburgh, Pittsburgh Public Schools' Career and Technical Education Program and Youth Enrichment Services. The goal of the project is to build stronger connections between youth in public sector CTE programs to employment pathways with local government. Programming included paid work experience for youth in fields of their interest and will conclude by June 30, 2022. Building off of lessons learned, Partner4Work was awarded BEP 4 funding by the PA Department of Labor and Industry, which will support additional co-operative education opportunities



for youth in Career and Technical Education (CTE) Centers in the county with employers that include UPMC, AHN and the Pittsburgh Airport, resulting in a pipeline of CTE graduates as employees.

Partner4Work administers the **Learn & Earn** program on behalf of Allegheny County and the City of Pittsburgh. Both the Learn & Earn Corporate and Learn & Earn general program applications are now open. More information can be found at [www.jobs4summer.org](http://www.jobs4summer.org).

### *Programs to Build Systems*

The **Aspen Institute Family Prosperity Project** seeks to expand equitable opportunities for low-income working families by engaging individual employers in adopting family supportive policies and practices that improve job quality. Over the coming months, Partner4Work staff will give presentations to Industry Partnership Councils, local Chambers of Commerce, and other employer associations, and work with individual employers to analyze and improve policies and practices related to job quality.

Work on Partner4Work's **Industry Partnerships** continues building employer-led initiatives. The **Technology Industry Partnership**, in collaboration with the Pittsburgh Technology Council, is registering additional apprenticeship tracks for careers in Tech, including Cybersecurity and Business Analyst. These additional tracks will increase choices for regional job seekers while integrating more training providers such as Per Scholas. Additionally, last month the 10 apprentices of the inaugural cohort started their 12-month long on-the-job training and full time employment. The **Financial Services Industry Partnership (FSIP)** continues to work to expand the BankWork\$ program, looking into geographical locations and curriculum expansion, to keep pace with changing customer behavior as communicated by our bank partners. This will be addressed in an upcoming FSIP meeting co-hosted by the PA Bankers Association, where we will also celebrate the graduation of the ninth cohort of BankWork\$ in early March. The **Healthcare Industry Partnership team** continues its work planning for registering apprenticeships in several healthcare roles, while building training pipelines for high-demand clinical roles. These positions include medical assistants and patient care technicians and wouldn't be possible without the commitment and support of our healthcare partners investing their resources with us to expand training and mentoring opportunities for our region's job seekers.

### **Summary of Partner4Work Policy Updates:**

To ensure alignment with the Workforce Innovation and Opportunity Act (WIOA) and additional state and federal requirements, Partner4Work must develop program policies that guide how Partner4Work-funded Adult, Dislocated Worker, and Youth services are delivered in Pittsburgh and Allegheny County. Fiscal, administrative, and

program policies must be voted on and approved by the Partner4Work Board of Directors prior to local implementation. Partner4Work staff have drafted the following for approval from the Board:

Program	Policy	Recommendation
WIOA Adult and Dislocated Worker	Eligibility Policy	<p><b>Policy Description:</b> This policy describes the eligibility criteria and documentation/verification requirements for WIOA Adult and Dislocated Worker program services.</p> <p><b>Recommendation:</b> Approve the following updates to the WIOA Adult and Dislocated Worker Eligibility:</p> <ul style="list-style-type: none"> <li>● <u>Definitions:</u> Added “Family” and “Homeless Individual” to the Definitions section. Moved “Displaced Homemaker” from the Definitions section to the Dislocated Worker Eligibility section. Added language clarifying difference between the definitions of “Self-Attestation” and “Self-Certification”.</li> <li>● Updated Underemployment section to clarify that all other WIOA eligibility criteria must also be met.</li> <li>● Added language describing the differences between eligibility “verification” and “documentation”.</li> <li>● Added language describing how Wagner-Peyser services may be provided prior to WIOA Title I eligibility determination.</li> <li>● Updated Self-Certification section to improve alignment with PA Department of Labor &amp; Industry’s WORKFORCE SYSTEM GUIDANCE No. 04-2015 (Change 1), September 11, 2017. Changes include: <ul style="list-style-type: none"> <li>○ Added section on “Rare Circumstances” in which self-certification may be used for eligibility determination.</li> <li>○ Reformatting to create individual sections for “Acceptable Eligibility Criteria”, “Prohibited Use”, “CWDS Case Note Requirements”, and “Telephone Verification”.</li> </ul> </li> <li>● Additional mechanical editing and formatting.</li> </ul>
WIOA and TANF Youth	Eligibility Policy	<p><b>Policy Description:</b> This policy describes the eligibility criteria and documentation/verification requirements for WIOA and TANF Youth program services.</p> <p><b>Recommendation:</b> Approve the following updates to the WIOA and TANF Youth Eligibility Policy:</p> <ul style="list-style-type: none"> <li>● Added language describing differences between eligibility “verification” and “documentation”.</li> <li>● Updated “Self-Certification” section to improve alignment with PA Department of Labor &amp; Industry’s WORKFORCE SYSTEM GUIDANCE No. 04-2015 (Change 1), September 11, 2017. Changes include:</li> </ul>

		<ul style="list-style-type: none"> <li>○ Added language further clarifying the allowability of self-certification for out-of-school youth (OSY).</li> <li>○ Added section on “Rare Circumstances” in which self-certification may be used for in-school youth (ISY) eligibility determination.</li> <li>○ Reformatting to create individual sections for “Acceptable Eligibility Criteria”, “Prohibited Use”, “CWDS Case Note Requirements”, and “Telephone Verification”.</li> <li>● Updated Federal Poverty Guidelines table with 2022 numbers.</li> <li>● Additional mechanical editing and formatting.</li> </ul>
WIOA Adult, Dislocated Worker, and Youth	Supportive Services Policy	<p><b>Policy Description:</b> This policy describes how supportive services are to be made available to participants of Workforce Innovation and Opportunity Act (WIOA) Title I Adult, Dislocated Worker, and Youth programs in Allegheny County and the City of Pittsburgh.</p> <p><b>Recommendation:</b> Approve the following updates to the P4W Supportive Services Policy:</p> <ul style="list-style-type: none"> <li>● Added ridesharing (Uber, Lyft, etc.) as an allowable supportive service cost under the transportation category. Included criteria that must be met prior to providing vouchers for ridesharing.</li> </ul>

### Summary of Fund Development Updates

Below is a summary of funded proposals awarded during Quarter 3 of 2021-2022. In addition, fund development efforts for the quarter focused significantly on the development and submission of the Good Jobs Challenge proposal to the US Economic Development Administration in February.

Funder	Amount	Project
Pennsylvania Department of Labor & Industry	\$150,000	Business Education Partnership - This project will support additional co-operative education opportunities for youth in Career and Technical Education (CTE) Centers in the county with employers that include UPMC, AHN and the Pittsburgh Airport, resulting in a pipeline of CTE graduates as employees.
Pennsylvania Department of Labor & Industry	\$250,000	Pennsylvania Industry Partnership Grant - This project will focus on supporting the Healthcare Industry. The central component of the project will be to develop a Medical Assistant pathway that goes from pre-hire work experience to On-

		the-Job training to certification. It will also look to build apprenticeship pathways in the industry.
Pennsylvania Department of Labor & Industry	\$250,000	Pennsylvania Industry Partnership Grant - This project will focus on supporting the Technology Industry. The central component of the project will be to support the coordination of training activities provided by Per Scholas in order to ensure alignment with the needs of local employers. It will also develop further apprenticeship pathways in the industry and support employers in improving their Diversity, Equity and Inclusion efforts.
Cities for Financial Empowerment	\$20,000 Planning grant for 2022 \$50,000 Implementation grant for 2023	Summer Jobs Connect - This project will build Learn & Earn's capacity to support young adults financial literacy education and their ability to open and effectively utilize bank accounts. The 2022 summer will focus on developing curriculum which can be used program wide as well as piloting bank account access services with 1-3 providers. The 2023 summer will look to expand upon the pilot program and make the services available to all participants.

## Partner4Work Full Employee List - Updated March 2022

Last Name	First Name	Job Title
ARMSTRONG	Kaleb	Youth Program Coordinator
BALTZER	Michael	Compliance Specialist
BARBIAUX	Michelle	Compliance Specialist
BINNIX	James	Communications Coordinator
BROMAN	Timothy	Database Specialist
CHERRY	Robert	Chief Executive Officer
CHRISTIANSEN	Mayada	Senior Director of Youth Programs
COLLINGTON-DENNISON	Miracle	Learn & Earn Program Coordinator
CONWAY	David	Industry Partnership Manager
CORBRIDGE	Dillon	Data Analyst
CRAIG	Karen	Youth Compliance Manager
CROWE	John	Earn and Work Ready Program Coordinator
DODSON	Ryan	Senior Accountant
DUTTON	LaDonna	Executive Assistant
FELICE	Toni	Director of Data and Evaluation
FORD	Carolyn	Contracts Manager
FORNARI	Emma	Compliance Specialist
GAGOSIAN	Julia	Special Projects Manager
IZIMBETOVA	Raihan	Earn and Work Ready Program Manager
JACOB	Debra	Communications Manager
JOHNSON	Jeanne	HR Generalist
JOHNSON	Jennifer	Accounting Clerk
KADISEVSKIS	Katrina	Director of Special Projects
KNUTSON	Dylan	Fund Development Manager
KRAMER	Kristin	Chief Financial Officer
KREIT	Brian	Director of Operations
LARGAESPADA	Edgar	Director of Industry Strategy
LONG	Markese	Director of Diversity, Equity & Inclusion and Community Engagement
MOLITOR	Ellen	Contract Management Specialist
MOORE	Dillon	Director of Policy
MOSLEY	Franklin	Administrative Assistant
PAJEWSKI	Jennifer	Chief of Staff
PETERSON	Stephanie	Learn & Earn Program Coordinator
POWELL	Kathleen	Program Manager, Adult Workforce Services
PUSKAR	Susan	Chief Policy and Research Manager (effective April 1)
ROPER	Kris	Director of Fiscal
ROSCHE	Hannah	Data Coordinator
ROSS	Jon	Subrecipient Compliance Manager/ EO Officer
SMITH	Aja	Youth Programs Manager
SMITH	Andrew	Senior Director of Adult Programs
TOMEIO	Melina	Development & Industry Partnership Specialist
WATKINS	Sharon	Community Engagement & Diversity Manager

WESLEY	Carl	Chief Program Officer (effective April 1)
WITT	Spencer	Payroll Specialist/Accountant
YEAGER	Bonny	Special Projects Manager
YOST	Monique	Program Manager , Adult Workforce Services

## PA CAREERLINK® PITTSBURGH/ALLEGHENY COUNTY SYSTEM

### COMPREHENSIVE CENTERS

#### **Allegheny East**

2040 Ardmore  
Boulevard  
Pittsburgh, PA 15221  
412-436-2225  
TTY 412-271-4217

#### **Downtown Pittsburgh**

Wood Street  
Commons  
301 Wood Street  
Pittsburgh, PA 15222  
412-552-7100  
TTY 412-552-7044

### REGIONAL CENTERS

#### **Alle-Kiski**

1150 5th Avenue,  
Suite 200  
New Kensington, PA  
15068  
724-334-8600  
TTY 724-334-8713

#### **Mon Valley Regional**

570 Galiffa Drive  
Donora, PA 15033  
724-379-4750  
TTY 724-379-5981

Partner4Work, formerly 3 Rivers Workforce Investment Board, leads the development, integration and implementation of a world-class workforce development system in Pittsburgh and Allegheny County.

**Mission**

Lead the development, integration, and implementation of a world-class workforce development system in Pittsburgh and Allegheny County.

**Vision**

We will be a community leader, an innovator, a strong partner, inclusive, a bridge builder between human services and workforce development systems, a model workplace.

**Values**

We will lead with integrity; treat individuals respectfully and support all individuals in their quest for meaningful employment; be inclusive in recognizing diversity; be excellent stewards of public resources; respect employers' diverse talent needs.

**Partner4Work**

Centre City Tower, Suite 2600  
650 Smithfield Street  
Pittsburgh, PA 15222  
Phone: (412) 552-7090  
Fax: (412) 552-7091  
[www.partner4work.org](http://www.partner4work.org)

*Equal Opportunity Employer*

*Auxiliary aids and services are available upon request. Reasonable accommodations can be made when requested in advance. Please call (412) 552-7090 or email [info@partner4work.org](mailto:info@partner4work.org) with your request.*

