



# Mississippi Valley Workforce Development Board

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## Chief Elected Officials (CEOs) Meeting Agenda

Tuesday, August 15, 2023, at 2 p.m.

Join Zoom Meeting

<https://us02web.zoom.us/j/89347318640?pwd=Szc2UW1FZDdYeXpybkt2VC85eitUQT09>

Meeting ID: 893 4731 8640 Passcode: 863306

One tap mobile +16465588656,,89347318640# US

Call to Order	Jim Irwin
Roll Call	Tyler Lanz
*Consent Agenda	Jim Irwin
Approval of Agenda	
Approval of Previous Minutes	
Financial Reports	
*Member Resignation (Page 24)	Mandy Tripp
*Member Nominations (Page 26)	Mandy Tripp
*Contract Management and Authorization Policy (Page 45)	Miranda Swafford
*Additional MOU Partners (Page 49)	Miranda Swafford
CEO Dashboard (Page 51)	Mandy Tripp
Title I Annual Report (Page 57)	Kendra Schaapveld
Business Services Update (Page 68)	Andrea Taylor
Board Report (Page 70)	Miranda Swafford
Other Business	
Public Comment	
Adjournment	Jim Irwin

\* Items requiring a vote \*\* Items Requiring a Roll Call Vote

### Accommodations

Accommodations are available upon request for individuals with disabilities. If you need accommodation, please contact: Andrea Taylor at [associate@mississippivalleyworkforce.org](mailto:associate@mississippivalleyworkforce.org) or at 1-844-967-5365



## Mississippi Valley Workforce Development Board

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### **Chief Elected Officials (CEOs) Meeting Agenda**

Tuesday, June 20, at 2 p.m. via Zoom

#### **CALLED TO ORDER**

Irwin called the meeting to order at 2:02 p.m.

#### **CEO PRESENT**

**Present:** Jim Irwin, Chuck Holmes, Jean Dickson, Don Schwenker, Danny Chick, Chad White, and Shane McCampbell

**Absent:** Shawn Maine (unexcused)

**Staff Present:** Miranda Swafford, Executive Director, Andrea Taylor, Associate Director, Mandy Tripp, Executive Assistant

**One-Stop Operator:** Nick Clayton

#### **QUORUM**

There was a quorum present to conduct business.

#### **APPROVAL OF AGENDA**

Holmes made a motion to approve the agenda, seconded by Dickson, and the motion carried.

#### **APPROVAL OF MINUTES**

McCampbell made a motion to approve the previous meeting minutes, seconded by Schwenker, and the motion carried.

#### **CEO TRAINING QUESTIONS**

Swafford advised there are still two people that need to complete the training. If anyone has any questions, please reach out.

#### **\*REVISIONS TO THE CEO AGREEMENT**

Swafford presented the revisions to the CEO agreement, a motion to approve it as presented by Schwenker, seconded by Holmes and the motion carried.

#### **\*ANNUAL MONITORING REPORT**

Tripp presented the annual monitoring report, reviewing the findings and areas of concern. Swafford presented why it would be important for the fiscal agent to do time tracking. White asked if we can require a time tracking log and Swafford advised we can for our grant. Motion to approve the report by Dickson, seconded by Chick and the motion carried.

#### **REVIEW ATTENDANCE**

Taylor presented the CEO, Board, and Committee attendance. Irwin will reach out to the CEO and if unsuccessful, will send a letter regarding attendance. Chick asked what happens if they

don't attend, the policy was reviewed, but essentially the County Board Supervisor is contacted to be made aware and possibly assign a new supervisor.

#### **\*BOARD RE-APPOINTMENTS**

Irwin advised Quigley's board term will expire on June 30, 2023. His position needs to be filled within 60 days and must be from a small business with policy-making power, if anyone has suggestions or contacts send it to Tripp. Motion to accept re-appointments of Dennis Duke, Kirby Phillips, Jacob Nye, and Carol Reynolds by Holmes, seconded by Dickson and the motion carried.

#### **\*NEW BOARD MEMBER APPOINTMENTS**

Taylor presented Nick Fogel and Chris Caves as new board members, Caves is on the Business Committee and Nick will join the Operations Committee. Chick made a motion to appoint Caves and Fogel, seconded by Schwenker and the motion carried. Schwenker asked what committee he was assigned to, and Tripp advised the opening is on the Business Committee at this time.

#### **\*CONTRACT EXTENSIONS**

Swafford presented the contract extensions that the Executive Committee voted to extend. The extension is for all three contracts through June 30, 2024. RFPs are required every 4 years they are initially a one-year contract with the option of a 3- 1 year extension. Holmes made a motion to extend the contracts, seconded by Dickson and the motion carried.

#### **\*APPROVE FISCAL AGENT BUDGET**

Swafford presented the CIJDC Fiscal Agent budget for PY23, which only increased by a few hundred dollars. Holmes made a motion to approve the Fiscal Agent budget, seconded by Schwenker, and the motion carried.

#### **\*PY23 BUDGETS**

Swafford advised we do not have final allocations yet but presented the proposed budget and showed last year's expenditures/carryover. Holmes made a motion to approve the budgets as long as there was no more than a 10% variance, seconded by Dickson and the motion carried.

#### **BUSINESS SERVICES UPDATE**

Taylor presented what the business team has been working on and how they are coming on the strategic plan. White asked about the impact of Iowa Wesleyan's closure and Taylor advised the teaching staff seemed to have jobs lined up and it was mostly janitorial and administrative staff that would be looking for work. The Mount Pleasant Chamber hosted office hours with IowaWORKS staff to assist weekly through the month of May. Swafford asked what information Irwin wanted brought to the board and he expressed concern over duplication of services and employer contact fatigue. Swafford advised they are working with IWD to minimize employer fatigue from too many business contacts.

#### **BOARD REPORT**

Swafford presented the board report advising we were selected for the Job Quality Academy and Jobs for the Future Workforce Communities of Action. Tripp advised we were awarded the North Scott Rotary grant and gave a social media update. Swafford reviewed the updates from the Executive Committee and Full Board meetings. Swafford advised the local board training would be on November 30<sup>th</sup>, 2023, in Burlington, more information to come on that. She also

advised that at the August Full Board meeting, the in-demand industries for our local areas will be determined. July 1<sup>st</sup> the board staff will begin the process of working on the IFA that is required to be in place by July 1, 2024.

**OTHER BUSINESS**

Swafford brought up for discussion the change in the IowaWORKS hours that was emailed out by Linda Rouse on 6/19/23. The concern is they did not consult with the local areas or CEOs to determine what was best for the area, they just changed it statewide to open at 8:00 a.m. instead of 8:30 a.m. Monday, Tuesday, Thursday, and Friday. After extensive discussion of options, it was determined a letter from each of the boards affected sent to Director Townsend and copy the Region 5 DOL representative would be the best approach at this time. Holmes made a motion to support sending a letter to IWD, seconded by Chick and the motion carried.

**PUBLIC COMMENT**

There were no public comments.

**ADJOURNMENT**

Irwin adjourned the meeting at 3:33 p.m.

# Financial Reports

**CIJDC**

**WIOA Statement of Rev & Exp YTD**

**For the Month Ending June 30th, 2023 Preliminary**

	<b>Administration</b>	<b>Adult Program</b>	<b>Dislocated Worker Program</b>	<b>NDWG Program</b>
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration	\$332,332.24			
WIOA Grant- Adult		\$916,983.92		
WIOA Grant- Dislocated Worker			\$674,063.94	
WIOA Grant- NDWG				\$59,336.07
WIOA Grant- Youth Out of School				
WIOA Grant- Youth In School				
<b>TOTAL</b>	<b>\$332,332.24</b>	<b>\$916,983.92</b>	<b>\$674,063.94</b>	<b>\$59,336.07</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$189,952.57	\$30,108.27	\$30,108.27	\$419.75
Fiscal Agent Costs	\$68,196.00	\$0.00	\$0.00	\$0.00
Subleases	\$0.00	\$52,880.37	\$52,880.37	\$0.00
Contractual RFP's	\$0.00	\$0.00	\$0.00	\$0.00
One Stop Operator	\$0.00	\$33,634.37	\$33,634.37	\$0.00
60110-60190 Salaries 60310-60330 & 60610-60560	\$0.00	\$243,549.16	\$209,426.01	\$32,139.20
Payroll Taxes, Fringe / Work Comp	\$0.00	\$58,146.12	\$46,956.47	\$7,607.26
60850 Mileage & Travel	\$37,919.60	\$16,206.03	\$13,904.92	\$1,203.54
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$1,422.97	\$6,603.61	\$5,622.51	\$110.98
62830, 62860 Outreach & Public Relations / Job Fairs	\$2,092.16	\$7,840.07	\$5,588.60	\$3,940.22
65610 Reimbursable Equipment	\$2,251.11	\$3,789.58	\$2,127.00	\$0.00
62510-62520 Resource Sharing Allocation	\$0.00	\$11,807.19	\$6,787.39	\$0.00
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$5,493.23	\$17,659.06	\$13,771.16	\$76.69
Information Technology	\$5,982.18	\$0.00	\$0.00	\$0.00
Dues & Subscriptions	\$6,648.50	\$0.00	\$0.00	\$0.00
Meeting Expenses	\$1,487.16	\$0.00	\$0.00	\$0.00
Conferences and Trainings	\$10,049.56	\$0.00	\$0.00	\$0.00
Printing	\$837.20	\$0.00	\$0.00	\$0.00
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$0.00	\$38,132.16	\$31,726.39	\$4,469.83
Management Fee	\$0.00	\$48,057.46	\$42,683.02	\$4,641.72
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	\$0.00
67408 Instructional Training	\$0.00	\$197,977.28	\$50,867.20	\$0.00
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$0.00	\$81,545.83	\$130,633.70	\$0.00
67426 Individual Career Services- New Service	\$0.00	\$2,766.00	\$2,045.00	\$0.00
67422 On the Job Training	\$0.00	\$81,094.05	\$26,497.34	\$0.00
67418,67420 Client Awards/Incentives	\$0.00	\$13,473.09	\$0.00	\$4,726.88
5% WEX Markup	\$0.00	\$4,054.72	\$1,324.86	\$0.00
<b>Unobligated/Unbudgeted Grant</b>	<b>\$0.00</b>	<b>\$1,293.87</b>	<b>\$1,113.73</b>	<b>\$0.00</b>
<b>TOTAL</b>	<b>\$332,332.24</b>	<b>\$916,983.92</b>	<b>\$674,063.94</b>	<b>\$59,336.07</b>

**CIJDC**

**WIOA Statement of Rev & Exp YTD**

**For the Month Ending June 30th, 2023 Preliminary**

	<b>Youth Program Out of School</b>	<b>Youth Program In School</b>	<b>One Stop Operator</b>	<b>Year To Date</b>
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration			\$0.00	\$332,332.24
WIOA Grant- Adult			\$33,634.37	\$950,618.29
WIOA Grant- Dislocated Worker			\$33,634.37	\$707,698.31
WIOA Grant- NDWG			\$0.00	\$59,336.07
WIOA Grant- Youth Out of School	\$1,210,005.47		\$25,225.75	\$1,235,231.22
WIOA Grant- Youth In School		\$302,137.28	\$8,408.60	\$310,545.88
<b>TOTAL</b>	<b>\$1,210,005.47</b>	<b>\$302,137.28</b>	<b>\$100,903.09</b>	<b>\$3,595,762.01</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$22,581.20	\$7,527.07	\$0.00	\$280,697.13
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	\$68,196.00
Subleases	\$40,862.08	\$13,620.67	\$0.00	\$160,243.49
Contractual RFP's	\$2,580.00	\$860.00	\$0.00	\$3,440.00
One Stop Operator	\$25,225.75	\$8,408.60	\$0.00	\$100,903.09
60110-60190 Salaries 60310-60330 & 60610-60560	\$456,227.32	\$118,459.24	\$44,675.15	\$1,059,800.93
Payroll Taxes, Fringe / Work Comp	\$113,378.18	\$29,708.98	\$10,631.21	\$255,797.01
60850 Mileage & Travel	\$27,445.74	\$7,099.65	\$7,401.60	\$103,779.48
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$18,100.25	\$4,578.43	\$743.78	\$36,438.75
62830, 62860 Outreach & Public Relations / Job Fairs	\$20,946.32	\$3,434.14	\$0.00	\$43,841.51
65610 Reimbursable Equipment	\$94,220.06	\$14,406.51	\$0.00	\$116,794.26
62510-62520 Resource Sharing Allocation	\$22,243.47	\$4,291.33	\$0.00	\$45,129.38
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$29,679.53	\$7,461.23	\$2,563.25	\$74,140.90
Information Technology	\$0.00	\$0.00	\$0.00	\$5,982.18
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	\$6,648.50
Meeting Expenses	\$0.00	\$0.00	\$0.00	\$1,487.16
Conferences and Trainings	\$0.00	\$0.00	\$0.00	\$10,049.56
Printing	\$0.00	\$0.00	\$0.00	\$837.20
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$81,587.72	\$19,758.54	\$6,885.37	\$175,674.64
Management Fee	\$84,668.25	\$22,680.01	\$7,944.64	\$202,730.46
65602, 65603 Work Experience	\$36,825.79	\$10,789.80	\$0.00	\$47,615.59
67408 Instructional Training	\$23,760.00	\$0.00	\$0.00	\$272,604.48
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$33,777.27	\$5,028.65	\$0.00	\$250,985.45
67426 Individual Career Services- New Service	\$1,441.00	\$0.00	\$0.00	\$6,252.00
67422 On the Job Training	\$5,199.88	\$5,523.65	\$0.00	\$118,314.92
67418,67420 Client Awards/Incentives	\$90,362.61	\$25,610.00	\$0.00	\$134,172.58
5% WEX Markup	\$1,841.30	\$539.49	\$0.00	\$7,760.37
<b>Unobligated/Unbudgeted Grant</b>	<b>\$2,277.50</b>	<b>\$759.89</b>	<b>\$0.00</b>	<b>\$5,444.99</b>
<b>TOTAL</b>	<b>\$1,210,005.47</b>	<b>\$302,137.28</b>	<b>\$80,845.00</b>	<b>\$3,595,762.01</b>

**CIJDC**

**WIOA Statement of Rev & Exp YTD**

**For the Month Ending June 30th, 2023 Preliminary**

	<b>Total Annual Budget</b>	<b>Remaining Budget</b>
<b>WIOA Grant Revenues</b>		
WIOA Grant - Administration	\$493,239.03	\$160,906.79
WIOA Grant- Adult	\$1,176,299.98	\$225,681.69
WIOA Grant- Dislocated Worker	\$881,657.99	\$173,959.68
WIOA Grant- NDWG	\$234,163.40	\$174,827.33
WIOA Grant- Youth Out of School	\$1,375,634.61	\$140,403.39
WIOA Grant- Youth In School	\$553,565.84	\$243,019.96
<b>TOTAL</b>	<b>\$4,714,560.85</b>	<b>\$1,118,798.84</b>
<b>WIOA Expenses</b>		
Board Salaries and Benefits	\$304,440.97	\$23,743.84
Fiscal Agent Costs	\$68,196.31	\$0.31
Subleases	\$155,006.09	-\$5,237.40
Contractual RFP's	\$75,275.01	\$71,835.01
One Stop Operator	\$107,391.09	\$6,488.00
60110-60190 Salaries 60310-60330 & 60610-60560	\$1,145,218.15	\$85,417.22
Payroll Taxes, Fringe / Work Comp	\$298,586.25	\$42,789.24
60850 Mileage & Travel	\$112,167.53	\$8,388.05
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$42,271.19	\$5,832.44
62830, 62860 Outreach & Public Relations / Job Fairs	\$58,293.23	\$14,451.72
65610 Reimbursable Equipment	\$121,126.57	\$4,332.31
62510-62520 Resource Sharing Allocation	\$45,129.38	\$0.00
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$80,535.33	\$6,394.43
Information Technology	\$7,000.00	\$1,017.82
Dues & Subscriptions	\$10,000.00	\$3,351.50
Meeting Expenses	\$4,000.00	\$2,512.84
Conferences and Trainings	\$15,000.00	\$4,950.44
Printing	\$4,000.00	\$3,162.80
Special Initiatives	\$15,000.00	\$15,000.00
Indirect Cost	\$191,476.82	\$15,802.18
Management Fee	\$202,730.45	-\$0.01
65602, 65603 Work Experience	\$459,092.82	\$411,477.23
67408 Instructional Training	\$336,891.64	\$64,287.16
Incumbent Worker Training	\$50,000.00	\$50,000.00
67412 Customer Support Service	\$306,683.73	\$55,698.28
67426 Individual Career Services- New Service	\$17,239.40	\$10,987.40
67422 On the Job Training	\$228,876.26	\$110,561.34
67418,67420 Client Awards/Incentives	\$115,972.61	-\$18,199.97
5% WEX Markup	\$22,954.64	\$15,194.27
<b>Unobligated/Unbudgeted Grant</b>	<b>\$114,005.41</b>	<b>\$108,560.42</b>
<b>TOTAL</b>	<b>\$4,714,560.88</b>	<b>\$1,118,798.87</b>



**CIJDC**  
**WIOA Statement of Revenue and Expenses- Administration YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Administration Budget	Remaining Budget	
<b>WIOA Grant Revenue</b>				
<b>WIOA Grant - Administration</b>	\$332,332.24	\$493,239.03	\$160,906.79	32.62%
	0			
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$189,952.57	\$210,757.90	\$20,805.33	9.87%
Fiscal Agent Costs	\$68,196.00	\$68,196.31	\$0.31	0.00%
Subleases	\$0.00	\$0.00	\$0.00	#DIV/0!
Contractual RFP's	\$0.00	\$0.00	\$0.00	#DIV/0!
60110-60190 Salaries	\$0.00	\$0.00	\$0.00	#DIV/0!
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$0.00	\$0.00	\$0.00	#DIV/0!
60850 Mileage & Travel	\$37,919.60	\$30,000.00	-\$7,919.60	-26.40%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$1,422.97	\$5,000.00	\$3,577.03	71.54%
62830, 62860 Outreach & Public Relations / Job Fairs	\$2,092.16	\$15,000.00	\$12,907.84	86.05%
65610 Reimbursable Equipment	\$2,251.11	\$5,000.00	\$2,748.89	54.98%
62510-62520 Resource Sharing Allocation	\$0.00		\$0.00	#DIV/0!
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$5,493.23	\$8,500.00	\$3,006.77	35.37%
Information Technology	\$5,982.18	\$7,000.00	\$1,017.82	14.54%
Dues & Subscriptions	\$6,648.50	\$10,000.00	\$3,351.50	33.52%
Meeting Expenses	\$1,487.16	\$4,000.00	\$2,512.84	62.82%
Conferences and Trainings	\$10,049.56	\$15,000.00	\$4,950.44	33.00%
Printing	\$837.20	\$4,000.00	\$3,162.80	79.07%
Special Initiatives	\$0.00	\$15,000.00	\$15,000.00	100.00%
Indirect Cost	\$0.00	\$0.00	\$0.00	#DIV/0!
Management Fee	\$0.00	\$0.00	\$0.00	#DIV/0!
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	#DIV/0!
67408 Instructional Training	\$0.00	\$0.00	\$0.00	#DIV/0!
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$0.00	\$0.00	\$0.00	#DIV/0!
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$0.00	#DIV/0!
65602 Work Based Learning	\$0.00	\$0.00	\$0.00	#DIV/0!
67422 On the Job Training	\$0.00	\$0.00	\$0.00	#DIV/0!
5% WEX Markup	\$0.00	\$0.00	\$0.00	#DIV/0!
<b>Unobligated/Unbudgeted Grant</b>	\$0.00	\$95,784.82	\$95,784.82	100.00%
<b>TOTAL</b>	<b>\$332,332.24</b>	<b>\$493,239.03</b>	<b>\$160,906.79</b>	

**CIJDC**  
**WIOA Statement of Revenue and Expenses- Adult YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Adult Budget	Remaining Budget	
<b>WIOA Grant Revenue</b>				
<b>WIOA Grant- Adult</b>	\$950,618.29	\$1,176,299.98	\$225,681.69	19.19%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$30,108.27	\$30,108.27	\$0.00	0.00%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$52,880.37	\$51,152.00	-\$1,728.37	-3.38%
Contractual RFP's	\$0.00	\$25,091.67	\$25,091.67	100.00%
One Stop Operator	\$33,634.37	\$35,797.03	\$2,162.66	6.04%
60110-60190 Salaries	\$243,549.16	\$275,175.82	\$31,626.66	11.49%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$58,146.12	\$77,368.25	\$19,222.13	24.84%
60850 Mileage & Travel	\$16,206.03	\$29,458.38	\$13,252.35	44.99%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$6,603.61	\$8,760.00	\$2,156.39	24.62%
62830, 62860 Outreach & Public Relations / Job Fairs	\$7,840.07	\$8,500.00	\$659.93	7.76%
65610 Reimbursable Equipment	\$3,789.58	\$4,500.00	\$710.42	15.79%
62510-62520 Resource Sharing Allocation	\$11,807.19	\$11,807.19	\$0.00	0.00%
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$17,659.06	\$19,615.15	\$1,956.09	9.97%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$38,132.16	\$45,389.77	\$7,257.61	15.99%
Management Fee	\$48,057.46	\$48,057.46	\$0.00	0.00%
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	#DIV/0!
67408 Instructional Training	\$197,977.28	\$241,891.64	\$43,914.36	18.15%
Incumbent Worker Training	\$0.00	\$25,000.00	\$25,000.00	100.00%
67412 Customer Support Service	\$81,545.83	\$100,000.00	\$18,454.17	18.45%
67426 Individual Career Services- New Service	\$2,766.00	\$6,000.00	\$3,234.00	53.90%
65602 Work Based Learning	\$81,094.05	\$96,717.92	\$15,623.87	16.15%
67422 On the Job Training	\$13,473.09	\$25,000.00	\$11,526.91	46.11%
5% WEX Markup	\$4,054.72	\$4,835.90	\$781.18	16.15%
<b>Unobligated/Unbudgeted Grant</b>	\$1,293.87	\$6,073.53	\$4,779.66	78.70%
<b>TOTAL</b>	<b>\$950,618.29</b>	<b>\$1,176,299.98</b>	<b>\$225,681.69</b>	

**CIJDC**  
**WIOA Statement of Revenue and Expenses- Dislocated Worker YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Dislocated Worker Budget	Remaining Budget	
<b>WIOA Grant Revenues</b>				
<b>WIOA Grant- Dislocated Worker</b>	\$707,698.31	\$881,657.99	\$173,959.68	19.73%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$30,108.27	\$30,108.27	\$0.00	0.00%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$52,880.37	\$51,152.00	-\$1,728.37	-3.38%
Contractual RFP's	\$0.00	\$25,091.67	\$25,091.67	100.00%
One Stop Operator	\$33,634.37	\$35,797.03	\$2,162.66	6.04%
60110-60190 Salaries	\$209,426.01	\$263,216.57	\$53,790.56	20.44%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$46,956.47	\$70,366.63	\$23,410.16	33.27%
60850 Mileage & Travel	\$13,904.92	\$16,757.51	\$2,852.59	17.02%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$5,622.51	\$5,622.51	\$0.00	0.00%
62830, 62860 Outreach & Public Relations / Job Fairs	\$5,588.60	\$6,000.00	\$411.40	6.86%
65610 Reimbursable Equipment	\$2,127.00	\$3,000.00	\$873.00	29.10%
62510-62520 Resource Sharing Allocation	\$6,787.39	\$6,787.39	\$0.00	0.00%
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$13,771.16	\$14,765.97	\$994.81	6.74%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$31,726.39	\$40,313.68	\$8,587.29	21.30%
Management Fee	\$42,683.02	\$42,683.02	\$0.00	0.00%
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	#DIV/0!
67408 Instructional Training	\$50,867.20	\$62,000.00	\$11,132.80	17.96%
Incumbent Worker Training	\$0.00	\$25,000.00	\$25,000.00	100.00%
67412 Customer Support Service	\$130,633.70	\$132,261.64	\$1,627.94	1.23%
67426 Individual Career Services- New Service	\$2,045.00	\$2,045.00	\$0.00	0.00%
65602 Work Based Learning	\$26,497.34	\$40,586.26	\$14,088.92	34.71%
67422 On the Job Training	\$0.00	\$0.00	\$0.00	#DIV/0!
5% WEX Markup	\$1,324.86	\$2,029.31	\$704.45	34.71%
<b>Unobligated/Unbudgeted Grant</b>	\$1,113.73	\$6,073.53	\$4,959.80	81.66%
<b>TOTAL</b>	<b>\$707,698.31</b>	<b>\$881,657.99</b>	<b>\$173,959.68</b>	

**CIJDC**  
**WIOA Statement of Revenue and Expenses- NDWG YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	NDWG Budget	Remaining Budget	
<b>WIOA Grant Revenue</b>				
<b>WIOA Grant- NDWG</b>	\$59,336.07	\$234,163.40	\$174,827.33	74.66%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$419.75	\$3,358.26	\$2,938.51	87.50%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$0.00	\$0.00	\$0.00	#DIV/0!
Contractual RFP's	\$0.00	\$0.00	\$0.00	#DIV/0!
One Stop Operator	\$0.00	\$0.00	\$0.00	#DIV/0!
60110-60190 Salaries	\$32,139.20	\$32,139.20	\$0.00	0.00%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$7,607.26	\$7,764.21	\$156.95	2.02%
60850 Mileage & Travel	\$1,203.54	\$1,406.25	\$202.71	14.41%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$110.98	\$210.00	\$99.02	47.15%
62830, 62860 Outreach & Public Relations / Job Fairs	\$3,940.22	\$4,000.00	\$59.78	1.49%
65610 Reimbursable Equipment	\$0.00	\$0.00	\$0.00	#DIV/0!
62510-62520 Resource Sharing Allocation	\$0.00	\$0.00	\$0.00	#DIV/0!
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$76.69	\$513.45	\$436.76	85.06%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$4,469.83	\$4,384.05	-\$85.78	-1.96%
Management Fee	\$4,641.72	\$4,641.72	\$0.00	0.00%
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	#DIV/0!
67408 Instructional Training	\$0.00	\$0.00	\$0.00	#DIV/0!
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$0.00	\$0.00	\$0.00	#DIV/0!
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$0.00	#DIV/0!
65602 Work Based Learning	\$0.00	\$0.00	\$0.00	#DIV/0!
67422 On the Job Training	\$4,726.88	\$175,746.26	\$171,019.38	97.31%
5% WEX Markup	\$0.00	\$0.00	\$0.00	#DIV/0!
<b>Unobligated/Unbudgeted Grant</b>	\$0.00	\$0.00	\$0.00	#DIV/0!
<b>TOTAL</b>	<b>\$59,336.07</b>	<b>\$234,163.40</b>	<b>\$171,370.36</b>	

**CIJDC**  
**WIOA Statement of Revenue and Expenses- Youth Combined YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Youth Budget	Remaining Budget	
<b>WIOA Grant Revenues</b>				
<b>WIOA Grant- Youth</b>	\$1,545,777.07	\$1,929,200.48	\$383,423.41	19.87%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$30,108.27	\$30,108.27	\$0.00	0.00%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$54,482.75	\$52,702.09	-\$1,780.66	-3.38%
Contractual RFP's	\$3,440.00	\$25,091.67	\$21,651.67	86.29%
One Stop Operator	\$33,634.35	\$35,797.03	\$2,162.68	6.04%
60110-60190 Salaries	\$574,686.56	\$574,686.56	\$0.00	0.00%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$143,087.16	\$143,087.16	\$0.00	0.00%
60850 Mileage & Travel	\$34,545.39	\$34,545.39	\$0.00	0.00%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$22,678.68	\$22,678.68	\$0.00	0.00%
62830, 62860 Outreach & Public Relations / Job Fairs	\$24,380.46	\$24,793.23	\$412.77	1.66%
65610 Reimbursable Equipment	\$108,626.57	\$108,626.57	\$0.00	0.00%
62510-62520 Resource Sharing Allocation	\$26,534.80	\$26,534.80	\$0.00	0.00%
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$37,140.76	\$37,140.76	\$0.00	0.00%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$101,346.26	\$101,389.32	\$43.06	0.04%
Management Fee	\$107,348.23	\$107,348.25	\$0.02	0.00%
65602, 65603 Work Experience	\$47,615.59	\$321,788.64	\$274,173.05	85.20%
67408 Instructional Training	\$23,760.00	\$33,000.00	\$9,240.00	28.00%
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$38,805.92	\$74,422.09	\$35,616.17	47.86%
67426 Individual Career Services- New Service	\$1,441.00	\$9,194.40	\$7,753.40	84.33%
67422 On the Job Training	\$10,723.53	\$28,130.00	\$17,406.47	61.88%
67418, 67420 Client Awards/Incentives	\$115,972.61	\$115,972.61	\$0.00	0.00%
5% WEX Markup	\$2,380.79	\$16,089.43	\$13,708.64	85.20%
<b>Unobligated/Unbudgeted Grant</b>	<b>\$3,037.39</b>	<b>\$6,073.53</b>	<b>\$3,036.14</b>	<b>49.99%</b>
<b>TOTAL</b>	<b>\$1,545,777.07</b>	<b>\$1,929,200.48</b>	<b>\$383,423.41</b>	
<b>WEP- 20% Expected Expenditure</b>				
Board Staff Salaries	\$2,030.58			
Staff Wages	\$160,773.83			
Client Wage Subsidy	\$43,581.03			
Client Wages Taxes	\$4,034.56			
WEX Markup 5%	\$2,380.79			
On the Job Training	\$7,756.17			
Client Awards / Incentives	\$35,025.00			
Customer Support Service	\$482.93			
VR Headsets for WBL Training	\$101,837.03			
<b>Total WEP Expenditures</b>	<b>\$357,901.92</b>	<b>\$385,840.10</b>	<b>\$27,938.18</b>	<b>7.24%</b>

**CIJDC**  
**WIOA Statement of Revenue and Expenses- Youth Out of School YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Youth Out of School Budget	Remaining Budget	
<b>WIOA Grant Revenue</b>				
WIOA Grant- Youth Out of School	\$1,235,231.22	\$1,375,634.61	\$140,403.39	10.21%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$22,581.20	\$22,581.20	\$0.00	0.00%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$40,862.08	\$39,526.57	-\$1,335.51	-3.38%
Contractual RFP's	\$2,580.00	\$18,818.75	\$16,238.75	86.29%
One Stop Operator	\$25,225.75	\$26,847.77	\$1,622.02	6.04%
60110-60190 Salaries	\$456,227.32	\$451,516.22	-\$4,711.10	-1.04%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$113,378.18	\$113,378.18	\$0.00	0.00%
60850 Mileage & Travel	\$27,445.74	\$27,445.74	\$0.00	0.00%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$18,100.25	\$17,371.00	-\$729.25	-4.20%
62830, 62860 Outreach & Public Relations / Job Fairs	\$20,946.32	\$20,946.32	\$0.00	0.00%
65610 Reimbursable Equipment	\$94,220.06	\$88,966.25	-\$5,253.81	-5.91%
62510-62520 Resource Sharing Allocation	\$22,243.47	\$17,410.88	-\$4,832.59	-27.76%
Professional Services and Business Expenses	\$29,679.53	\$29,679.53	\$0.00	0.00%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$81,587.72	\$79,968.28	-\$1,619.44	-2.03%
Management Fee	\$84,668.25	\$84,668.24	-\$0.01	0.00%
65602, 65603 Work Experience	\$36,825.79	\$118,740.63	\$81,914.84	68.99%
67408 Instructional Training	\$23,760.00	\$33,000.00	\$9,240.00	28.00%
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$33,777.27	\$59,333.79	\$25,556.52	43.07%
67426 Individual Career Services- New Service	\$1,441.00	\$6,580.47	\$5,139.47	78.10%
67422 On the Job Training	\$5,199.88	\$18,000.00	\$12,800.12	71.11%
67418,67420 Client Awards/Incentives	\$90,362.61	\$90,362.61	\$0.00	0.00%
5% WEX Markup	\$1,841.30	\$5,937.03	\$4,095.73	68.99%
<b>Unobligated/Unbudgeted Grant</b>	<b>\$2,277.50</b>	<b>\$4,555.15</b>	<b>\$2,277.65</b>	<b>50.00%</b>
<b>TOTAL</b>	<b>\$1,235,231.22</b>	<b>\$1,375,634.61</b>	<b>\$140,403.39</b>	
<b>WEP- 20% Expected Expenditure</b>				
Board Staff Salaries	\$1,469.40			
Staff Wages	\$126,471.30			
Client Wage Subsidy	\$33,700.04			
Client Wages Taxes	\$3,125.75			
WEX Markup 5%	\$1,841.30			
On the Job Training	\$7,089.80			
Client Awards / Incentives	\$29,675.00			
Customer Support Service	\$482.93			
VR Headsets for WBL Training	\$88,343.59			
<b>Total WEP Expenditures</b>	<b>\$291,716.18</b>	<b>\$291,020.10</b>	<b>-\$696.08</b>	<b>-0.24%</b>

**CIJDC**  
**WIOA Statement of Revenue and Expenses- Youth In School YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	Youth in School Budget	Remaining Budget	
<b>WIOA Grant Revenues</b>				
<b>WIOA Grant- Youth In School</b>	\$310,545.88	\$553,565.84	\$243,019.96	43.90%
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$7,527.07	\$7,527.07	\$0.00	0.00%
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$13,620.67	\$13,175.52	-\$445.15	-3.38%
Contractual RFP's	\$860.00	\$6,272.92	\$5,412.92	86.29%
One Stop Operator	\$8,408.60	\$8,949.26	\$540.66	6.04%
60110-60190 Salaries	\$118,459.24	\$118,459.24	\$0.00	0.00%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$29,708.98	\$31,733.22	\$2,024.24	6.38%
60850 Mileage & Travel	\$7,099.65	\$9,351.00	\$2,251.35	24.08%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$4,578.43	\$5,068.00	\$489.57	9.66%
62830, 62860 Outreach & Public Relations / Job Fairs	\$3,434.14	\$6,773.44	\$3,339.30	49.30%
65610 Reimbursable Equipment	\$14,406.51	\$22,241.56	\$7,835.05	35.23%
62510-62520 Resource Sharing Allocation	\$4,291.33	\$4,291.33	\$0.00	0.00%
61745,64120,65120,65544,65520,65530,65125,65128,65130				
Professional Services and Business Expenses	\$7,461.23	\$7,461.23	\$0.00	0.00%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$19,758.54	\$21,421.03	\$1,662.49	7.76%
Management Fee	\$22,680.01	\$22,680.01	\$0.00	0.00%
65602, 65603 Work Experience	\$10,789.80	\$203,048.01	\$192,258.21	94.69%
67408 Instructional Training	\$0.00	\$0.00	\$0.00	#DIV/0!
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$5,028.65	\$15,088.29	\$10,059.64	66.67%
67426 Individual Career Services- New Service	\$0.00	\$2,613.93	\$2,613.93	100.00%
67422 On the Job Training	\$5,523.65	\$10,130.00	\$4,606.35	45.47%
67418,67420 Client Awards/Incentives	\$25,610.00	\$25,610.00	\$0.00	0.00%
5% WEX Markup	\$539.49	\$10,152.40	\$9,612.91	94.69%
Unobligated/Unbudgeted Grant	\$759.89	\$1,518.38	\$758.49	49.95%
<b>TOTAL</b>	<b>\$310,545.88</b>	<b>\$553,565.84</b>	<b>\$243,019.96</b>	
<b>WEP- 20% Expected Expenditure</b>				
Board Staff Salaries	\$454.11			
Staff Wages	\$34,302.53			
Client Wage Subsidy	\$9,880.99			
Client Wages Taxes	\$908.81			
WEX Markup 5%	\$539.49			
On the Job Training	\$4,211.27			
Client Awards / Incentives	\$5,350.00			
VR Headsets for WBL Training	\$13,493.44			
<b>Total WEP Expenditures</b>	<b>\$69,140.64</b>	<b>\$97,006.70</b>	<b>\$27,866.06</b>	<b>28.73%</b>

**CIJDC**  
**WIOA Statement of Revenue and Expenses- One Stop Operator YTD**  
**For the Month Ending June 30th, 2023**

	Year to Date	OSO Budget	Remaining Budget	
<b>WIOA Grant Revenues</b>				
WIOA Grant- Adult	\$33,634.37	\$35,797.03	\$2,162.66	6.04%
WIOA Grant- Dislocated Worker	\$33,634.37	\$35,797.03	\$2,162.66	6.04%
WIOA Grant- Youth	\$33,634.35	\$35,797.03	\$2,162.68	6.04%
<b>TOTAL</b>	<b>\$100,903.09</b>	<b>\$107,391.09</b>	<b>\$6,488.00</b>	<b>6.04%</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$0.00	\$0.00	\$0.00	#DIV/0!
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	#DIV/0!
Subleases	\$0.00	\$0.00	\$0.00	#DIV/0!
Contractual RFP's	\$0.00	\$0.00	\$0.00	#DIV/0!
60110-60190 Salaries	\$44,675.15	\$48,214.97	\$3,539.82	7.34%
60310-60330 & 60610-60560 Payroll Taxes, Fringe / Work Comp	\$10,631.21	\$12,718.82	\$2,087.61	16.41%
60850 Mileage & Travel	\$7,401.60	\$7,551.75	\$150.15	1.99%
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$743.78	\$894.00	\$150.22	16.80%
62830, 62860 Outreach & Public Relations / Job Fairs	\$0.00	\$0.00	\$0.00	#DIV/0!
65610 Reimbursable Equipment	\$0.00	\$0.00	\$0.00	#DIV/0!
62510-62520 Resource Sharing Allocation	\$0.00	\$0.00	\$0.00	#DIV/0!
Professional Services and Business Expenses	\$2,563.25	\$2,563.25	\$0.00	0.00%
Information Technology	\$0.00	\$0.00	\$0.00	#DIV/0!
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	#DIV/0!
Meeting Expenses	\$0.00	\$0.00	\$0.00	#DIV/0!
Conferences and Trainings	\$0.00	\$0.00	\$0.00	#DIV/0!
Printing	\$0.00	\$0.00	\$0.00	#DIV/0!
Special Initiatives	\$0.00	\$0.00	\$0.00	#DIV/0!
Indirect Cost	\$6,885.37	\$7,503.63	\$618.26	8.24%
Management Fee	\$7,944.64	\$7,944.64	\$0.00	0.00%
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	#DIV/0!
67408 Instructional Training	\$0.00	\$0.00	\$0.00	#DIV/0!
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	#DIV/0!
67412 Customer Support Service	\$0.00	\$0.00	\$0.00	#DIV/0!
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$0.00	#DIV/0!
65602 Work Based Learning	\$0.00	\$0.00	\$0.00	#DIV/0!
67422 On the Job Training	\$0.00	\$0.00	\$0.00	#DIV/0!
<b>5% WEX Markup</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>#DIV/0!</b>
Unobligated/Unbudgeted Grant	\$0.00	\$0.00	\$0.00	#DIV/0!
<b>TOTAL</b>	<b>\$80,845.00</b>	<b>\$87,391.06</b>	<b>\$6,546.06</b>	



**Administration:**

	<b>PY21 Carryover</b>	<b>FY22 Carryover</b>	<b>PY 22</b>	<b>FY23</b>	<b>Cumulative Totals</b>
Grant	\$22,556.31	\$144,567.72	\$178,978.00	\$147,137.00	\$493,239.03
Unobligated Funds	\$0.00	\$0.00	\$0.00	\$95,784.82	\$95,784.82
Total Obligated Funds	\$22,556.31	\$144,567.72	\$178,978.00	\$51,352.18	\$397,454.21
Expenditures to Date	\$22,556.31	\$144,567.72	\$165,208.21	\$0.00	\$332,332.24
Obligated Balance as of (06/30/23)	\$0.00	\$0.00	\$13,769.79	\$51,352.18	\$65,121.97
Unspent Funds	\$0.00	\$0.00	\$13,769.79	\$51,352.18	\$65,121.97
Funds that can be carried over	\$0.00	\$0.00	\$178,978.00	\$147,137.00	\$326,115.00

**Dislocated Workers:**

	<b>FY22 Carryover</b>	<b>PY 22</b>	<b>FY 23</b>	<b>Cumulative Totals</b>
Grant	\$180,288.99	\$159,003.00	\$512,366.00	\$851,657.99
Unobligated Funds	\$0.00	\$0.00	\$4,959.80	\$4,959.80
Total Obligated Funds	\$180,288.99	\$159,003.00	\$507,406.20	\$846,698.19
Expenditures to date	\$180,288.99	\$159,003.00	\$368,406.32	\$707,698.31
Obligated Balance as of (06/30/23)	\$0.00	\$0.00	\$143,959.68	\$143,959.68
Unspent funds	\$0.00	\$0.00	\$143,959.68	\$143,959.68
Funds that can be carried over	\$0.00	\$31,800.60	\$102,473.20	\$134,273.80

**Adult:**

	<b>FY22 Carryover</b>	<b>PY22</b>	<b>FY23</b>	<b>Cumulative Totals</b>
Grant	\$212,751.97	\$181,674.00	\$811,874.00	\$1,206,299.97
Unobligated Funds	\$0.00	\$0.00	\$4,959.80	\$4,959.80
Total Obligated Funds	\$212,751.97	\$181,674.00	\$806,914.20	\$1,201,340.17
Expenditures to date	\$212,751.97	\$181,674.00	\$556,192.32	\$950,618.29
Obligated Balance as of (06/30/23)	\$0.00	\$0.00	\$250,721.88	\$250,721.88
Unspent funds	\$0.00	\$0.00	\$250,721.88	\$250,721.88
Funds that can be carried over	\$0.00	\$0.00	\$162,374.80	\$162,374.80

**Youth Combined:**

	<b>PY21 Carryover</b>	<b>PY 22</b>	<b>Cumulative Totals</b>
Grant	\$659,066.47	\$1,270,134.00	\$1,929,200.47
Unobligated Funds	\$0.00	\$3,036.14	\$3,036.14
Total Obligated Funds	\$659,066.47	\$1,267,097.86	\$1,926,164.33
Expenditures to date	\$659,066.47	\$886,710.60	\$1,545,777.07
Obligated Balance as of (06/30/23)	\$0.00	\$380,387.26	\$380,387.26
Unspent funds	\$0.00	\$380,387.26	\$380,387.26
Funds that can be carried over	\$0.00	\$254,026.80	\$254,026.80

**Youth Work Experience:**

	<b>PY21 Carryover</b>	<b>PY 22 Expenses</b>	<b>Cumulative Totals</b>
Drawn Amount to Date	\$659,066.47	\$886,710.60	\$1,545,777.07
Work Experience Expended	\$131,813.29	\$226,088.63	\$357,901.92
Work Experience Required	\$131,813.29	\$254,026.80	\$385,840.09
<b>Percentage Expended</b>	100%	89%	93%

**NDWG:**

Grant	\$234,163.40
Unobligated Funds	\$3,125.30
Total Obligated Funds	\$231,038.10
Expenditures to date	\$59,336.07
Obligated Balance as of (06/30/23)	\$171,702.03
Unspent funds	\$171,702.03
Funds that can be carried over	\$0.00

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**WIOA Statement of Rev & Exp YTD Comparison  
For the Month Ending June 30th, 2023 Preliminary**

	Administration	SIRPC Administration	Adult Program	SIRPC Adult Program
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration	\$332,332.24	\$309,324.34		
WIOA Grant- Adult			\$916,983.92	\$1,022,885.91
WIOA Grant- Dislocated Worker				
WIOA Grant- NDWG				
WIOA Grant- Youth Out of School				
WIOA Grant- Youth In School				
<b>TOTAL</b>	<b>\$332,332.24</b>	<b>\$309,324.34</b>	<b>\$916,983.92</b>	<b>\$1,022,885.91</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$189,952.57	\$160,125.44	\$30,108.27	\$22,375.54
Fiscal Agent Costs	\$68,196.00	\$76,593.29	\$0.00	\$0.00
Subleases	\$0.00	\$880.26	\$52,880.37	\$43,893.95
Contractual RFP's	\$0.00	\$2,212.50	\$0.00	\$2,921.47
One Stop Operator	\$0.00	\$0.00	\$33,634.37	\$25,329.76
60110-60190 Salaries	\$0.00	\$0.00	\$243,549.16	\$277,351.62
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$0.00	\$0.00	\$58,146.12	\$71,575.57
60850 Mileage & Travel	\$37,919.60	\$20,447.11	\$16,206.03	\$10,865.46
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$1,422.97	\$182.00	\$6,603.61	\$8,353.16
62830, 62860 Outreach & Public Relations / Job Fairs	\$2,092.16	\$13,840.53	\$7,840.07	\$8,502.86
65610 Reimbursable Equipment	\$2,251.11	\$5,134.48	\$3,789.58	\$9,943.09
62510-62520 Resource Sharing Allocation	\$0.00	\$0.00	\$11,807.19	\$8,669.59
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$5,493.23	\$11,777.46	\$17,659.06	\$2,947.38
Information Technology	\$5,982.18	\$4,784.01	\$0.00	\$0.00
Dues & Subscriptions	\$6,648.50	\$4,796.25	\$0.00	\$0.00
Meeting Expenses	\$1,487.16	\$1,840.69	\$0.00	\$0.00
Conferences and Trainings	\$10,049.56	\$5,733.13	\$0.00	\$0.00
Printing	\$837.20	\$977.19	\$0.00	\$0.00
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$0.00	\$0.00	\$38,132.16	\$38,071.30
Management Fee	\$0.00	\$0.00	\$48,057.46	\$51,553.30
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	\$76,299.45
67408 Instructional Training	\$0.00	\$0.00	\$197,977.28	\$310,012.22
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$0.00	\$0.00	\$81,545.83	\$63,559.76
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$2,766.00	\$2,282.00
67422 On the Job Training	\$0.00	\$0.00	\$81,094.05	\$9,893.22
67418,67420 Client Awards/Incentives	\$0.00	\$0.00	\$13,473.09	\$0.00
5% WEX Markup	\$0.00	\$0.00	\$4,054.72	\$3,814.97
<b>Unobligated/Unbudgeted Grant</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,293.87</b>	<b>\$0.00</b>
<b>TOTAL</b>	<b>\$332,332.24</b>	<b>\$309,324.34</b>	<b>\$916,983.92</b>	<b>\$1,022,885.91</b>

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**WIOA Statement of Rev & Exp YTD Comparison  
For the Month Ending June 30th, 2023 Preliminary**

	<b>Dislocated Worker Program</b>	<b>SIRPC Dislocated Worker Program</b>	<b>NDWG Program</b>	<b>SIRPC NDWG Program</b>
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration				
WIOA Grant- Adult				
WIOA Grant- Dislocated Worker	\$674,063.94	\$505,118.52		
WIOA Grant- NDWG			\$59,515.26	\$55,255.60
WIOA Grant- Youth Out of School				
WIOA Grant- Youth In School				
<b>TOTAL</b>	<b>\$674,063.94</b>	<b>\$505,118.52</b>	<b>\$59,515.26</b>	<b>\$55,255.60</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$30,108.27	\$22,375.54	\$419.75	\$5,213.88
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	\$0.00
Subleases	\$52,880.37	\$43,893.95	\$0.00	\$0.00
Contractual RFP's	\$0.00	\$2,325.59	\$0.00	-\$0.03
One Stop Operator	\$33,634.37	\$25,329.76	\$0.00	\$0.00
60110-60190 Salaries	\$209,426.01	\$185,676.38	\$32,139.20	\$31,476.65
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$46,956.47	\$41,492.92	\$7,607.26	\$3,463.29
60850 Mileage & Travel	\$13,904.92	\$9,249.69	\$1,203.54	\$6.25
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$5,622.51	\$5,051.11	\$110.98	\$21.91
62830, 62860 Outreach & Public Relations / Job Fairs	\$5,588.60	\$4,507.56	\$3,940.22	\$0.00
65610 Reimbursable Equipment	\$2,127.00	\$7,708.06	\$0.00	\$0.00
62510-62520 Resource Sharing Allocation	\$6,787.39	\$5,356.92	\$0.00	\$0.00
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$13,771.16	\$2,385.48	\$76.69	\$0.00
Information Technology	\$0.00	\$0.00	\$0.00	\$0.00
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	\$0.00
Meeting Expenses	\$0.00	\$0.00	\$0.00	\$0.00
Conferences and Trainings	\$0.00	\$0.00	\$0.00	\$0.00
Printing	\$0.00	\$0.00	\$0.00	\$0.00
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$31,726.39	\$25,183.86	\$4,469.83	\$3,416.38
Management Fee	\$42,683.02	\$38,504.63	\$4,641.72	\$4,972.50
65602, 65603 Work Experience	\$0.00	\$0.00	\$0.00	\$0.00
67408 Instructional Training	\$50,867.20	\$63,545.79	\$0.00	\$0.00
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$130,633.70	\$45,930.04	\$0.00	\$0.00
67426 Individual Career Services- New Service	\$2,045.00	\$1,931.00	\$0.00	\$0.00
67422 On the Job Training	\$26,497.34	\$0.00	\$0.00	\$6,684.77
67418,67420 Client Awards/Incentives	\$0.00	\$0.00	\$4,726.88	\$0.00
5% WEX Markup	\$1,324.86	\$0.00	\$0.00	\$0.00
<b>Unobligated/Unbudgeted Grant</b>	<b>\$1,113.73</b>	<b>\$0.00</b>	<b>\$179.19</b>	<b>\$0.00</b>
<b>TOTAL</b>	<b>\$674,063.94</b>	<b>\$505,118.52</b>	<b>\$59,515.26</b>	<b>\$55,255.60</b>

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**WIOA Statement of Rev & Exp YTD Comparison  
For the Month Ending June 30th, 2023 Preliminary**

	YOUTH PROGRAM Out of School	SIRPC Youth Program Out of School	YOUTH PROGRAM In School	SIRPC Youth Program In School
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration				
WIOA Grant- Adult				
WIOA Grant- Dislocated Worker				
WIOA Grant- NDWG				
WIOA Grant- Youth Out of School	\$1,210,005.47	\$728,230.45		
WIOA Grant- Youth In School			\$302,137.28	\$205,792.21
<b>TOTAL</b>	<b>\$1,210,005.47</b>	<b>\$728,230.45</b>	<b>\$302,137.28</b>	<b>\$205,792.21</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$22,581.20	\$19,031.63	\$7,527.07	\$6,343.91
Fiscal Agent Costs	\$0.00	\$0.00	\$0.00	\$0.00
Subleases	\$40,862.08	\$32,880.43	\$13,620.67	\$13,565.95
Contractual RFP's	\$2,580.00	\$2,970.79	\$860.00	\$1,256.97
One Stop Operator	\$25,225.75	\$18,997.33	\$8,408.60	\$6,332.47
60110-60190 Salaries	\$456,227.32	\$285,230.62	\$118,459.24	\$89,625.12
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$113,378.18	\$68,940.28	\$29,708.98	\$19,404.32
60850 Mileage & Travel	\$27,445.74	\$10,091.69	\$7,099.65	\$3,119.38
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$18,100.25	\$10,541.30	\$4,578.43	\$3,454.27
62830, 62860 Outreach & Public Relations / Job Fairs	\$20,946.32	\$3,987.01	\$3,434.14	\$1,243.07
65610 Reimbursable Equipment	\$94,220.06	\$86,409.53	\$14,406.51	\$25,313.81
62510-62520 Resource Sharing Allocation	\$22,243.47	\$7,105.27	\$4,291.33	\$2,266.65
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$29,679.53	\$10,594.64	\$7,461.23	\$3,403.81
Information Technology	\$0.00	\$0.00	\$0.00	\$0.00
Dues & Subscriptions	\$0.00	\$0.00	\$0.00	\$0.00
Meeting Expenses	\$0.00	\$0.00	\$0.00	\$0.00
Conferences and Trainings	\$0.00	\$0.00	\$0.00	\$0.00
Printing	\$0.00	\$0.00	\$0.00	\$0.00
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$81,587.72	\$45,923.59	\$19,758.54	\$14,291.31
Management Fee	\$84,668.25	\$61,710.91	\$22,680.01	\$17,002.18
65602, 65603 Work Experience	\$36,825.79	\$44,675.20	\$10,789.80	\$3,334.72
67408 Instructional Training	\$23,760.00	\$14,238.50	\$0.00	\$0.00
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$33,777.27	\$16,941.83	\$5,028.65	\$1,685.00
67426 Individual Career Services- New Service	\$1,441.00	\$0.00	\$0.00	\$0.00
67422 On the Job Training	\$5,199.88	\$904.31	\$5,523.65	\$0.00
67418,67420 Client Awards/Incentives	\$90,362.61	\$3,830.00	\$25,610.00	\$315.00
5% WEX Markup	\$1,841.30	\$2,222.92	\$539.49	\$166.74
<b>Unobligated/Unbudgeted Grant</b>	<b>\$2,277.50</b>	<b>\$0.00</b>	<b>\$759.89</b>	<b>\$0.00</b>
<b>TOTAL</b>	<b>\$1,210,005.47</b>	<b>\$728,230.45</b>	<b>\$302,137.28</b>	<b>\$205,792.21</b>

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**WIOA Statement of Rev & Exp YTD Comparison  
For the Month Ending June 30th, 2023 Preliminary**

	<b>One Stop Operator</b>	<b>SIRPC One Stop Operator</b>	<b>Year To Date</b>	<b>SIRPC Year To Date</b>
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration	\$0.00	\$0.00	\$332,332.24	\$309,324.34
WIOA Grant- Adult	\$33,634.37	\$25,329.76	\$950,618.29	\$1,048,215.67
WIOA Grant- Dislocated Worker	\$33,634.37	\$25,329.76	\$707,698.31	\$530,448.28
WIOA Grant- NDWG	\$0.00	\$0.00	\$59,515.26	\$55,255.60
WIOA Grant- Youth Out of School	\$25,225.75	\$18,997.33	\$1,235,231.22	\$747,227.78
WIOA Grant- Youth In School	\$8,408.60	\$6,332.47	\$310,545.88	\$212,124.68
<b>TOTAL</b>	<b>\$100,903.09</b>	<b>\$75,989.32</b>	<b>\$3,595,941.20</b>	<b>\$2,902,596.35</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$0.00	\$0.00	\$280,697.13	\$235,465.94
Fiscal Agent Costs	\$0.00	\$0.00	\$68,196.00	\$76,593.29
Subleases	\$0.00	\$0.00	\$160,243.49	\$135,114.54
Contractual RFP's	\$0.00	\$91.15	\$3,440.00	\$11,778.44
One Stop Operator	\$0.00	\$0.00	\$100,903.09	\$75,989.32
60110-60190 Salaries	\$44,675.15	\$49,090.67	\$1,059,800.93	\$918,451.06
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$10,631.21	\$9,721.12	\$255,797.01	\$214,597.50
60850 Mileage & Travel	\$7,401.60	\$2,575.74	\$103,779.48	\$56,355.32
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$743.78	\$795.60	\$36,438.75	\$28,399.35
62830, 62860 Outreach & Public Relations / Job Fairs	\$0.00	\$0.00	\$43,841.51	\$32,081.03
65610 Reimbursable Equipment	\$0.00	\$0.00	\$116,794.26	\$134,508.97
62510-62520 Resource Sharing Allocation	\$0.00	\$0.00	\$45,129.38	\$23,398.43
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$2,563.25	\$403.11	\$74,140.90	\$31,511.88
Information Technology	\$0.00	\$0.00	\$5,982.18	\$4,784.01
Dues & Subscriptions	\$0.00	\$0.00	\$6,648.50	\$4,796.25
Meeting Expenses	\$0.00	\$0.00	\$1,487.16	\$1,840.69
Conferences and Trainings	\$0.00	\$0.00	\$10,049.56	\$5,733.13
Printing	\$0.00	\$0.00	\$837.20	\$977.19
Special Initiatives	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$6,885.37	\$6,123.58	\$175,674.64	\$133,010.02
Management Fee	\$7,944.64	\$7,188.35	\$202,730.46	\$180,931.87
65602, 65603 Work Experience	\$0.00	\$0.00	\$47,615.59	\$124,309.37
67408 Instructional Training	\$0.00	\$0.00	\$272,604.48	\$387,796.51
Incumbent Worker Training	\$0.00	\$0.00	\$0.00	\$0.00
67412 Customer Support Service	\$0.00	\$0.00	\$250,985.45	\$128,116.63
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$6,252.00	\$4,213.00
67422 On the Job Training	\$0.00	\$0.00	\$118,314.92	\$17,482.30
67418,67420 Client Awards/Incentives	\$0.00	\$0.00	\$134,172.58	\$4,145.00
5% WEX Markup	\$0.00	\$0.00	\$7,760.37	\$6,204.63
<b>Unobligated/Unbudgeted Grant</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$5,624.18</b>	<b>\$0.00</b>
<b>TOTAL</b>	<b>\$80,845.00</b>	<b>\$75,989.32</b>	<b>\$3,590,317.02</b>	<b>\$2,902,596.35</b>

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**WIOA Statement of Rev & Exp YTD Comparison  
For the Month Ending June 30th, 2023 Preliminary**

	<b>Total Annual Budget</b>	<b>SIRPC Total Annual Budget</b>	<b>Remaining Budget</b>	<b>SIRPC Remaining Budget</b>
<b>WIOA Grant Revenues</b>				
WIOA Grant - Administration	\$493,239.03	\$476,448.36	\$160,906.79	\$167,124.02
WIOA Grant- Adult	\$1,176,299.98	\$1,260,967.64	\$225,681.69	\$212,751.97
WIOA Grant- Dislocated Worker	\$881,657.99	\$710,737.24	\$173,959.68	\$180,288.96
WIOA Grant- NDWG	\$234,163.40	\$289,419.00	\$174,648.14	\$234,163.40
WIOA Grant- Youth Out of School	\$1,375,634.61	\$1,298,239.45	\$140,403.39	\$551,011.67
WIOA Grant- Youth In School	\$553,565.84	\$320,179.48	\$243,019.96	\$108,054.80
<b>TOTAL</b>	<b>\$4,714,560.85</b>	<b>\$4,355,991.17</b>	<b>\$1,118,619.65</b>	<b>\$1,453,394.82</b>
<b>WIOA Expenses</b>				
Board Salaries and Benefits	\$304,440.97	\$196,908.77	\$23,743.84	-\$38,557.17
Fiscal Agent Costs	\$68,196.31	\$72,500.00	\$0.31	-\$4,093.29
Subleases	\$155,006.09	\$111,050.00	-\$5,237.40	-\$24,064.54
Contractual RFP's	\$75,275.01	\$22,851.00	\$71,835.01	\$11,072.56
One Stop Operator	\$107,391.09	\$99,882.00	\$6,488.00	\$23,892.68
60110-60190 Salaries	\$1,145,218.15	\$1,020,952.43	\$85,417.22	\$102,501.37
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$298,586.25	\$243,165.26	\$42,789.24	\$28,567.76
60850 Mileage & Travel	\$112,167.53	\$103,609.00	\$8,388.05	\$47,253.68
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$42,271.19	\$34,409.63	\$5,832.44	\$6,010.28
62830, 62860 Outreach & Public Relations / Job Fairs	\$58,293.23	\$65,729.15	\$14,451.72	\$33,648.12
65610 Reimbursable Equipment	\$121,126.57	\$31,422.24	\$4,332.31	-\$103,086.73
62510-62520 Resource Sharing Allocation	\$45,129.38	\$28,735.00	\$0.00	\$5,336.57
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$80,535.33	\$35,777.51	\$6,394.43	\$4,265.63
Information Technology	\$7,000.00	\$2,801.99	\$1,017.82	-\$1,982.02
Dues & Subscriptions	\$10,000.00	\$10,000.00	\$3,351.50	\$5,203.75
Meeting Expenses	\$4,000.00	\$2,500.00	\$2,512.84	\$659.31
Conferences and Trainings	\$15,000.00	\$15,371.86	\$4,950.44	\$9,638.73
Printing	\$4,000.00	\$7,007.00	\$3,162.80	\$6,029.81
Special Initiatives	\$15,000.00	\$0.00	\$15,000.00	\$0.00
Indirect Cost	\$191,476.82	\$141,142.77	\$15,802.18	\$8,132.75
Management Fee	\$202,730.45	\$163,509.63	-\$0.01	-\$17,422.24
65602, 65603 Work Experience	\$459,092.82	\$288,851.00	\$411,477.23	\$164,541.63
67408 Instructional Training	\$336,891.64	\$449,449.00	\$64,287.16	\$61,652.49
Incumbent Worker Training	\$50,000.00	\$0.00	\$50,000.00	\$0.00
67412 Customer Support Service	\$306,683.73	\$335,620.00	\$55,698.28	\$207,503.37
67426 Individual Career Services- New Service	\$17,239.40	\$0.00	\$10,987.40	-\$4,213.00
67422 On the Job Training	\$228,876.26	\$394,256.00	\$110,561.34	\$376,773.70
67418,67420 Client Awards/Incentives	\$115,972.61	\$22,503.00	-\$18,199.97	\$18,358.00
5% WEX Markup	\$22,954.64	\$14,443.00	\$15,194.27	\$8,238.37
<b>Unobligated/Unbudgeted Grant</b>	<b>\$117,130.71</b>	<b>\$538,704.14</b>	<b>\$111,506.53</b>	<b>\$538,704.14</b>
<b>TOTAL</b>	<b>\$4,717,686.18</b>	<b>\$4,353,269.38</b>	<b>\$1,121,744.98</b>	<b>\$1,450,673.03</b>

## \*Member Resignation

**Reason** - Board member resignation must be accepted by CEOs.

**Documents Included** - Resignation email

**Action Requested** - Accept resignation



## **Mandy Tripp**

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**From:** Christine Caves <ccaves@quadcitieschamber.com>  
**Sent:** Friday, July 28, 2023 10:49 AM  
**To:** Mandy Tripp  
**Subject:** Board Resignation Notice - Chris Caves

Hello Mandy,  
Please accept this email as notice of my resignation from the Mississippi Valley Workforce Board. I will continue to serve on the business committee for the board.

Thank you,  
Chris Caves

**Chris Caves**  
**Vice President, Business & Economic Growth**  
**Quad Cities Chamber**  
Office: 563.823.2672  
Mobile: 309.373.8404  
[QuadCitiesChamber.com](https://www.quadcitieschamber.com)

**If you appreciated the assistance I've provided you today, please take a moment to complete this brief survey and tell us about your experience**  
<https://www.surveymonkey.com/r/KNY2QN7>

## \*Member Nominations

**Reason** - Fill current vacancies.

**Documents Included** - Summary Page, Conflict of Interest  
Attestations, Nomination Forms

**Action Requested** - Approve new board members.

## **Board Member Nominations**

We had several people reach out to us that they were interested, and all were given a deadline of August 1, 2023, for nomination forms to be completed and submitted.

Kimberly Jaber is the Human Resources Manager at Berry Global and would represent business and would take Chris Caves' position that she has to resign from due to meeting conflicts with her full-time job.

Caitlin Bliesener is the Talent Acquisition Manager at Great River Health. She would fill the vacancy left by Brad Quigley and represent business as well as the Healthcare Sector, which we currently do not have any representation from on our board. Her political affiliation is democratic.

Amy McCabe is the nominee from IWD to be the Title III board member to replace Jana Wittenberg. She is the Operations Manager at the Davenport Iowa *WORKS* center.

One nomination was received after the deadline.

Tracy McCampbell is the Director of District and Capital for Alliant Energy.

If any of them are not selected to serve on the board at this time, we will ask them to join a committee to still have their voice at the table and then when a vacancy opens, they would be contacted to be moved to board membership if they still wished to continue.



**IOWA** State Workforce  
Development Board

## Local Workforce Development Board Member Conflict of Interest Attestation Form

Local Workforce Development Area: Mississippi Valley IWD

I, the undersigned, have read Section 107(h) of the Workforce Innovation and Opportunity Act, and do hereby attest that a conflict of interest does not exist between my individual interests and my ability to make unbiased decisions while serving as a member of the Local Workforce Development Board.

If a conflict of interest arises between my individual interests and duties as a member of the Local Workforce Development Board, I will immediately acknowledge, disclose and act according to Local Workforce Development Board By-Laws for such conflicts.

Amy E McCabe

Local Workforce Development Board Member's Printed Name

Amy McCabe

Local Workforce Development Board Member's Signature

July 11, 2023

Date

Submit completed copy to:

[WIOAgovernance@iwd.iowa.gov](mailto:WIOAgovernance@iwd.iowa.gov)

### Legal References

- [WIOA sec. 107\(h\)](#)
- [Iowa Code sec. 15A.2](#)

## Local Workforce Development Board Member Nomination Form

### Section 1: Nominee Information

Local Workforce Development Area: Mississippi Valley LWDA

Name: Amy McCabe Gender:  Male  Female

Business/Organization: Iowa Workforce Development Position/Title: workforce Development manager

# of Employees: 900 Industry Sector: \_\_\_\_\_

Business Address: 1801 E. Kimberly Rd. Davenport, IA County: Scott

Email: amy.r.mccabe@iwd.iowa.gov Business Phone: 563-445-3200  
Ext. 43326

Describe briefly why you would like to serve on the Local Workforce Development Board:

To represent title III services under local area.

Local Workforce Development Board category the nominee represents:

(Check one category and type of organization under that category)

Business

Small Business (as defined by the U.S. Small Business Administration)

Business

Workforce

Labor Organization

Labor Organization or Training Director from an Apprenticeship Program

Community-Based Organization serving individuals with barriers to employment with employment, training, or education needs

Organization serving youth with employment, training, or education needs

Employment & Training

Adult Education and Literacy

Institution of Higher Education providing workforce activities (including Community Colleges)

Government

Economic and Community Development Entity

State Wagner-Peyser Act Representative

Vocational Rehabilitation Representative

Other: \_\_\_\_\_

## Local Workforce Development Board Member Nomination Form

### Section 2: Nominator Information

Organization: Iowa Workforce Development


Name: Beth Townsend Position/Title: Agency Director

Email: beth.townsend@jwd.iowa.gov Business Phone: 515-281-5634

*The nominee must serve as either owner, chief executive or operative officer, other type of executive officer, or a person with optimum policymaking or hiring authority within the entity they represent.*

Does the nominee qualify?  Yes  No

*I hereby recommend and nominate the above-named person for membership on the Local Workforce Development Board.*

Signature of Nominator:  Date: 07/12/2023

### Section 3: Action by the Chief Lead Elected Official

Subject to certification required by Section 107 of the Workforce Innovation and Opportunity Act of 2014 and Policy 1.4.1.1 Submission of Nominations, the person nominated herein has been duly appointed to the Local Workforce Development Board by the Chief Lead Elected Official.

Political Affiliation: \_\_\_\_\_ Term of Appointment: From \_\_\_\_\_ To \_\_\_\_\_

Signature of Chief Lead Elected Official: \_\_\_\_\_ Date: \_\_\_\_\_

### Section 4: Action by Iowa Workforce Development

Appointment is:  Affirmed  Denied

Signature of IWD Representative: \_\_\_\_\_ Date: \_\_\_\_\_

### Legal References

- [WIOA sec. 107\(h\)](#)

ATTACHMENT A

Mississippi Valley Workforce Area
Conflict of Interest Declaration Form

I, Tracy McCampbell, a Member of the Mississippi Valley Workforce Development Board or committee, Chief Elected Officials (CEO), or staff member hereby affirm that I have read and understand the Conflict-of-Interest Policy. I also hereby declare and promise to carry out my responsibilities in relation to upholding the Conflict-of-Interest Policy during my term as a Board Member, Committee Member, CEO, or Staff Member.

I disclose the following conflict(s) of interest:

Check All That Apply:

I represent an organization that has current business/contractual dealings with MVWA or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I have an immediate family member(s) who is employed by a current or potential WIOA funded Service Provider/Contractor or by another organization that that has current business/contractual dealings with MVWA, or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I represent a WIOA funded Service Provider/Contractor.

I represent an entity that provides monitoring and/or oversight of MVWA or any of its partners.

I represent a WIOA Core or Required Partner.

Other: NA

For any conflicts checked above, please describe the nature of the conflict(s):

NA

X I have no conflicts at this time.

I have received a copy, read, and fully understand the Mississippi Valley Workforce Area, (MVWA) Conflict of Interest Policy and agree to abide by its requirements.

For the reasons stated above, I promise and attest that I will hereby declare, before a vote or discussion on the matter, the nature and extent of any conflict. I will hereby voluntarily withhold from participating in any discussions pertaining to this matter and abstain from voting on the subject. I further understand that this shall not prohibit me from responding to any direct questions on the matter from other Members. I further understand that my duty to disclose conflicts hereunder is an ongoing duty and I will continue to abide by this Policy as long as I remain a Member of: the MVWA Chief Elected Officials, the MVWDB or its Committees, or the MVWDB Staff.

Member Signature: Tracy McCampbell

Print Name: Tracy McCampbell

Date: 2023-Aug-02 | 11:09:00 CDT



# Local Workforce Development Board Member Nomination Form

## Section 1: Nominee Information

Local Workforce Development Area: Burlington

Name: Tracy McCampbell Gender:  Male  Female

Business/Organization: Alliant Energy Position/Title: Director, Distr. & Capital

# of Employees: \_\_\_\_\_ Industry Sector: Utilities

Business Address: 527 S Roosevelt Ave, Burlington, IA County: Des Moines

Email: tracymccampbell@alliantenergy.com Business Phone: 319-213-3951

Describe briefly why you would like to serve on the Local Workforce Development Board:  
I am interested in learning about the needs of workforce in our area while offering information that may be useful in the future workforce.

Local Workforce Development Board category the nominee represents:

*(Check one category and type of organization under that category)*

- Business
  - Small Business (as defined by the U.S. Small Business Administration)
  - Business
- Workforce
  - Labor Organization
  - Labor Organization or Training Director from an Apprenticeship Program
  - Community-Based Organization serving individuals with barriers to employment with employment, training, or education needs
  - Organization serving youth with employment, training, or education needs
- Employment & Training
  - Adult Education and Literacy
  - Institution of Higher Education providing workforce activities (including Community Colleges)
- Government
  - Economic and Community Development Entity
  - State Wagner-Peyser Act Representative
  - Vocational Rehabilitation Representative
- Other: \_\_\_\_\_





## Local Workforce Development Board Member Nomination Form

### Section 2: Nominator Information

Organization: Greater Burlington Partnership

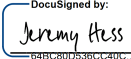
Name: Jeremy Hess Position/Title: Director of Economic Development

Email: jhess@greaterburlington.com Business Phone: 319-208-0050

*The nominee must serve as either owner, chief executive or operative officer, other type of executive officer, or a person with optimum policymaking or hiring authority within the entity they represent.*

Does the nominee qualify?  Yes  No

*I hereby recommend and nominate the above-named person for membership on the Local Workforce Development Board.*

Signature of Nominator:  Date: 2023-Aug-02 | 13:12:20 CDT

### Section 3: Action by the Chief Lead Elected Official

Subject to certification required by Section 107 of the Workforce Innovation and Opportunity Act of 2014 and Policy 1.4.1.1 Submission of Nominations, the person nominated herein has been duly appointed to the Local Workforce Development Board by the Chief Lead Elected Official.

Political Affiliation: \_\_\_\_\_ Term of Appointment: From \_\_\_\_\_ To \_\_\_\_\_

Signature of Chief Lead Elected Official: \_\_\_\_\_ Date: \_\_\_\_\_

### Section 4: Action by Iowa Workforce Development

Appointment is:  Affirmed  Denied

Signature of IWD Representative: \_\_\_\_\_ Date: \_\_\_\_\_

### Legal References

- [WIOA sec. 107\(h\)](#)

**ATTACHMENT A**

**Mississippi Valley Workforce Area  
Conflict of Interest Declaration Form**

I, Caitlin Bliesener, a Member of the Mississippi Valley Workforce Development Board or committee, Chief Elected Officials (CEO), or staff member hereby affirm that I have read and understand the Conflict-of-Interest Policy. I also hereby declare and promise to carry out my responsibilities in relation to upholding the Conflict-of-Interest Policy during my term as a Board Member, Committee Member, CEO, or Staff Member.

I disclose the following conflict(s) of interest:

**Check All That Apply:**

I represent an organization that has current business/contractual dealings with MVWA or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I have an immediate family member(s) who is employed by a current or potential WIOA funded Service Provider/Contractor or by another organization that that has current business/contractual dealings with MVWA, or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I represent a WIOA funded Service Provider/Contractor.

I represent an entity that provides monitoring and/or oversight of MVWA or any of its partners.

I represent a WIOA Core or Required Partner.

Other: \_\_\_\_\_

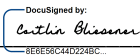
For any conflicts checked above, please describe the nature of the conflict(s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I have no conflicts at this time.

I have received a copy, read, and fully understand the Mississippi Valley Workforce Area, (MVWA) Conflict of Interest Policy and agree to abide by its requirements.

For the reasons stated above, I promise and attest that I will hereby declare, before a vote or discussion on the matter, the nature and extent of any conflict. I will hereby voluntarily withhold from participating in any discussions pertaining to this matter and abstain from voting on the subject. I further understand that this shall not prohibit me from responding to any direct questions on the matter from other Members. I further understand that my duty to disclose conflicts hereunder is an ongoing duty and I will continue to abide by this Policy as long as I remain a Member of: the MVWA Chief Elected Officials, the MVWDB or its Committees, or the MVWDB Staff.

Member Signature:  \_\_\_\_\_

Print Name: Caitlin Bliesener

Date: 2023-Jul-24 | 15:40:27 CDT



### Local Workforce Development Board Member Nomination Form

#### Section 1: Nominee Information

Local Workforce Development Area: Des Moines County  
 Name: Caitlin Bliesener Gender:  Male  Female  
 Business/Organization: Great River Health Position/Title: Talent Acq.  
 # of Employees: 2,500 Industry Sector: Healthcare  
 Business Address: 1221 S. Gear Ave County: Des Moines  
 Email: cbliesener@greatriverhealth.org Business Phone: 319-768-3759

Describe briefly why you would like to serve on the Local Workforce Development Board:  
I would like to utilize my knowledge of recruitment and the workforce in the healthcare sector to make a positive impact for our area.

Local Workforce Development Board category the nominee represents:  
 (Check one category and type of organization under that category)

- Business
  - Small Business (as defined by the U.S. Small Business Administration)
  - Business
- Workforce
  - Labor Organization
  - Labor Organization or Training Director from an Apprenticeship Program
  - Community-Based Organization serving individuals with barriers to employment with employment, training, or education needs
  - Organization serving youth with employment, training, or education needs
- Employment & Training
  - Adult Education and Literacy
  - Institution of Higher Education providing workforce activities (including Community Colleges)
- Government
  - Economic and Community Development Entity
  - State Wagner-Peyser Act Representative
  - Vocational Rehabilitation Representative
- Other: \_\_\_\_\_



## Local Workforce Development Board Member Nomination Form

### Section 2: Nominator Information

Organization: Greater Burlington Partnership

Name: Jeremy Hess

Position/Title: Director of Economic Development

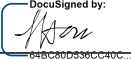
Email: [jhess@greaterburlington.com](mailto:jhess@greaterburlington.com)

Business Phone: 319-208-0050

*The nominee must serve as either owner, chief executive or operative officer, other type of executive officer, or a person with optimum policymaking or hiring authority within the entity they represent.*

Does the nominee qualify?  Yes  No

*I hereby recommend and nominate the above-named person for membership on the Local Workforce Development Board.*

Signature of Nominator:  \_\_\_\_\_ Date: 2023-Jul-26 | 10:16:15 CDT

### Section 3: Action by the Chief Lead Elected Official

Subject to certification required by Section 107 of the Workforce Innovation and Opportunity Act of 2014 and Policy 1.4.1.1 Submission of Nominations, the person nominated herein has been duly appointed to the Local Workforce Development Board by the Chief Lead Elected Official.

Political Affiliation: \_\_\_\_\_ Term of Appointment: From \_\_\_\_\_ To \_\_\_\_\_

Signature of Chief Lead Elected Official: \_\_\_\_\_ Date: \_\_\_\_\_

### Section 4: Action by Iowa Workforce Development

Appointment is:  Affirmed  Denied

Signature of IWD Representative: \_\_\_\_\_ Date: \_\_\_\_\_

### Legal References

- [WIOA sec. 107\(h\)](#)



# CAITLIN BLIESENER

109 W. Van Weiss Blvd, West Burlington, IA 52655

[caitlinnacole@yahoo.com](mailto:caitlinnacole@yahoo.com)

319-850-9454

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## PROFILE

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*Driven individual with a degree in Human Resources Management and 4 years of HR experience. I have a high focus on employee engagement, satisfaction, retention, and everything in between. My goal is to facilitate change in an organization and to make a difference for employees by improving company culture, encouraging career development, building on training processes, and improving overall employee satisfaction.*

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## EXPERIENCE

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### **Great River Health – full-time – West Burlington, Iowa**

*Talent Acquisition Specialist | April 2022 - present*

Duties include: Onboarding process with new hires, recruiting new hires, job fairs, screening candidates, scheduling interviews and orientations, job posting management, working with leaders on recruitment and staffing needs, filing documents, phone calls, data entry, working with Marketing team on brand building, networking

Supervisor: Nicole Panther | Manager of Talent Management | 319-768-3750

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### **Carl A. Nelson & Co. – full-time – Burlington, Iowa**

*HR Generalist | June 2021 – April 2022*

Duties include: Onboarding process with new hires, job fairs, scheduling interviews, completing new hire orientation, filing documents, phone calls, data entry, tracking employee training and certifications,

Reason for leaving: Accepted position as Talent Acquisition Specialist for Great River Health

Supervisor: Julie Totten | VP of Administration | 319-754-8415

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### **Team Staffing Solutions, Inc – full-time – Burlington, Iowa**

*Talent Acquisition Administrator | November 2020 – June 2021*

Duties include: Onboarding process with new hires, recruiting new hires, job fair support, scheduling interviews and orientations, drug screens, helping new employees through tax and insurance information, filing documents, phone calls, data entry

Reason for leaving: Accepted position as HR Generalist for Carl A. Nelson & Company

Supervisor: Michael Dear | General Manager | 319-753-9844

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**AIM Credit Union – full-time – Cedar Rapids, Iowa**

*Member Service Representative | May 1<sup>st</sup>, 2017 – October 23<sup>rd</sup>, 2020*

Duties include: Office management, ordering cash, ACH and share draft processing, receiving, and counting cash, balancing vaults, drawers and general ledgers, clerical duties, answering phone calls, opening/closing accounts, opening and closing the branch, etc.

Reason for leaving: Moved to Burlington, Iowa

Supervisor: Denice Habel | Vice President of Operations | 563-585-3728

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**EDUCATION**

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Southern New Hampshire University, Manchester, NH

Bachelors in Business Administration *with a concentration in Human Resource Management*

GPA: 3.8 / 4.0

Awards/Acknowledgements: Dean's list, President's list, Member of the National Society of Leadership and Success

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**SKILLS**

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- Office management
- Creative
- Leadership development
- Planning/Organizing
- Training/Onboarding
- Customer Service
- Teamwork

**ATTACHMENT A**

**Mississippi Valley Workforce Area  
Conflict of Interest Declaration Form**

I, kimberly Jaber, a Member of the Mississippi Valley Workforce Development Board or committee, Chief Elected Officials (CEO), or staff member hereby affirm that I have read and understand the Conflict-of-Interest Policy. I also hereby declare and promise to carry out my responsibilities in relation to upholding the Conflict-of-Interest Policy during my term as a Board Member, Committee Member, CEO, or Staff Member.

I disclose the following conflict(s) of interest:

**Check All That Apply:**

I represent an organization that has current business/contractual dealings with MVWA or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I have an immediate family member(s) who is employed by a current or potential WIOA funded Service Provider/Contractor or by another organization that that has current business/contractual dealings with MVWA, or one or more of its Core or Required WIOA Partners, or other WIOA funded Service Providers/Contractors.

I represent a WIOA funded Service Provider/Contractor.

I represent an entity that provides monitoring and/or oversight of MVWA or any of its partners.

I represent a WIOA Core or Required Partner.

Other: \_\_\_\_\_


For any conflicts checked above, please describe the nature of the conflict(s):

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I have no conflicts at this time.

I have received a copy, read, and fully understand the Mississippi Valley Workforce Area, (MVWA) Conflict of Interest Policy and agree to abide by its requirements.

For the reasons stated above, I promise and attest that I will hereby declare, before a vote or discussion on the matter, the nature and extent of any conflict. I will hereby voluntarily withhold from participating in any discussions pertaining to this matter and abstain from voting on the subject. I further understand that this shall not prohibit me from responding to any direct questions on the matter from other Members. I further understand that my duty to disclose conflicts hereunder is an ongoing duty and I will continue to abide by this Policy as long as I remain a Member of: the MVWA Chief Elected Officials, the MVWDB or its Committees, or the MVWDB Staff.

Member Signature:  \_\_\_\_\_

Print Name: kimberly Jaber

Date: 2023-Jul-27 | 13:55:49 CDT



### Local Workforce Development Board Member Nomination Form

#### Section 1: Nominee Information

Local Workforce Development Area: Mississippi Valley

Name: Kimberly Jaber Gender:  Male  Female

Business/Organization: Berry Global, Inc. Position/Title: HR Manager

# of Employees: 155 Industry Sector: Manufacturing

Business Address: 2732 62nd St Ct. Bettendorf County: Scott

Email: Kimberly.jaber@berryglobal.com Business Phone: 563-449-0400

Describe briefly why you would like to serve on the Local Workforce Development Board:  
I would very much like to use my leadership skills and HR expertise to help make a positive impact on our local workforce

Local Workforce Development Board category the nominee represents:

(Check one category and type of organization under that category)

- Business
  - Small Business (as defined by the U.S. Small Business Administration)
  - Business
- Workforce
  - Labor Organization
  - Labor Organization or Training Director from an Apprenticeship Program
  - Community-Based Organization serving individuals with barriers to employment with employment, training, or education needs
  - Organization serving youth with employment, training, or education needs
- Employment & Training
  - Adult Education and Literacy
  - Institution of Higher Education providing workforce activities (including Community Colleges)
- Government
  - Economic and Community Development Entity
  - State Wagner-Peyser Act Representative
  - Vocational Rehabilitation Representative
- Other: \_\_\_\_\_





## Local Workforce Development Board Member Nomination Form

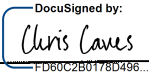
### Section 2: Nominator Information

Organization: Quad Cities Chamber  
 Name: Chris Caves Position/Title: VP, Business & Economic Growth  
 Email: ccaves@quadcitieschamber.com Business Phone: 563-823-2672

*The nominee must serve as either owner, chief executive or operative officer, other type of executive officer, or a person with optimum policymaking or hiring authority within the entity they represent.*

Does the nominee qualify?  Yes  No

*I hereby recommend and nominate the above-named person for membership on the Local Workforce Development Board.*

Signature of Nominator:  Date: 2023-Jul-27 | 16:04:27 CDT

### Section 3: Action by the Chief Lead Elected Official

Subject to certification required by Section 107 of the Workforce Innovation and Opportunity Act of 2014 and Policy 1.4.1.1 Submission of Nominations, the person nominated herein has been duly appointed to the Local Workforce Development Board by the Chief Lead Elected Official.

Political Affiliation: \_\_\_\_\_ Term of Appointment: From \_\_\_\_\_ To \_\_\_\_\_

Signature of Chief Lead Elected Official: \_\_\_\_\_ Date: \_\_\_\_\_

### Section 4: Action by Iowa Workforce Development Appointment is: Affirmed Denied

Signature of IWD Representative: \_\_\_\_\_ Date: \_\_\_\_\_

#### Legal References

- WIOA sec. 107(h)

## ***Kimberly D. Jaber, MBA***

2625 Sandgate Lane  
Muscatine, IA 52761  
(309) 333-3182  
[kd\\_wagy@hotmail.com](mailto:kd_wagy@hotmail.com)

### **PROFESSIONAL SUMMARY**

Organized and self-motivated professional with 15 years of operations management experience, 7 years at a director level. Robust knowledge of multiple areas of business, from Human Resources to Procurement and Marketing. Critical thinker adept at making analytical decisions and solving problems efficiently with excellent communication and relationship development skills.

- Successful leader with years of HR (Human Resources) & Marketing management skills along with P&L and budget experience.
- Top performer with proven record of accomplishment in aiding in decreasing expenses, increasing revenues, improving profit, and maximizing employee satisfaction.
- Assisted in developing and implementing corporate wide onboarding and training plan for new Human Resources Managers. Personally, trained and mentored 5 new HRMs in the past 3 years.
- Developing content and aiding in launch of corporate wide Plant Manager training program, expected to launch in 2024.
- Created and launched plant wide employee engagement and retention initiative reducing hourly turnover from 27% to 13% in 12 months.
- Twenty-two-year history of loyal dedication to one employer and promoted more than 5 times in 10 years.
- Strong communicator with experience in delivering motivational and educational presentations and training.
- 

### **WORK EXPERIENCE**

#### **Berry Global**

**Multi-Site Human Resource Manager**, Muscatine, IA (formally Letica Corp.) – January 2019 to July 2020  
Bettendorf, IA. – April 2020 to present. Multi-Site responsibilities from June 2023 to present. (Anaheim, CA., Tacoma, WA., Peosta, IA. and home plant of Bettendorf, IA.)

- Responsible for assisting plant management in implementing safety programs and educating associates about safety.
- Experienced with responsibility of multiple sites.
- Helped develop, implement, and manage changes of new Plant pandemic policies and procedures.
- In charge of establishing and maintaining plant associate records and reports; ensures compliance with all associate regulations regarding associate files; establishes and maintains security/confidentiality of associate data.
- Manage the recruitment effort for all plant hourly and salaried associates; conducts new associate orientations; implements and monitors career path program, associate relations counseling, and exit interviews; writes and places advertisements including radio, print and social.
- Acts as Management's liaison with the workforce and fosters continuing and ongoing excellent associate/management relations; recommends common sense and equitable solutions to associate problems; anticipates and advises management of potential associate related problems.
- Responsible for remaining current on foreign national associate regulations; ensures foreign nationals are maintaining and pursuing correct visa status paperwork.
- Supervises Human Resource or office staff, as necessary; provides training and development opportunities for all levels of associates.
- Lead the investigation of workers' compensation claims and collect and record claim data.
- Accountable for all State and Federal government procedures, policies, guidelines, rules, and regulations as instructed by corporate; select applicable guidelines and regulations to different situations.

- Responsible for communicating, verbally and in writing, with associates, physicians, and others to collect and provide information related to workers' compensation claims and property claims; facilitate return to work of injured associates using modified duty programs and medical case management.
- Manage associate eligibility, calculate vacation, and sick time requests for salaried and hourly associates and maintain attendance program for hourly associates.
- In charge of bulletin boards throughout the building and ensure information is transmitted promptly.
- Responsible for processing payroll for plant hourly and salaried associates.
- Direct discipline issues and obtain corporate approval for terminations when necessary.
- Assist in the annual review process for both hourly and salary employees.
- Communicate changes and administer benefits for all new hires and during open enrollment.
- Accountable for reducing and maintaining an acceptable level of employee turnover.
- Plan, develop, budget, and implement employee engagement and retention initiatives.
- Conduct and/or coordinate training at all levels of the facility.

## **Hy-Vee, Inc.**

**Store Director**, Fort Madison, IA - January 2016- February 2018, Waterloo, IA – May 2012 - December 2015 and Cedar Rapids, IA - July 2011-April 2012

- Lead teams of up to 450 in all areas of operations, from Procurement to Sales.
- Oversee all management-related issues, including human resources, hiring/coaching/mentoring team members, conducting performance reviews, ensuring compliance with regulatory requirements, scheduling, setting, and maintaining a labor budget.
- Recognized by Progressive Grocer Magazine as a Top Women in Grocery in 2017.
- Develop pricing structure and merchandising plan to meet established goals.
- Ensured delivery of superior customer service and satisfaction, including increasing customer satisfaction rating by 37% in FY 2016.
- Accountable for setting and achieving sales and profit goals while keeping company assets in working order.
- Reduced store expenses from \$1.9 million to \$1.7 million in Q1 FY 2018.
- Recognized for increasing sales by over 7% in FY 2016.
- Managed \$250,000 advertising and marketing budget.
- Experienced and trained in media appearances, both television and radio.
- Write and review all local media layout, including radio, print, social and digital advertising.
- Determine in-store advertising plan, including the selection of items, medium for placement and prices for maximum sales and profitability.
- Understand consumer trends and react to those trends in a timely and appropriate manner to drive sales growth.
- Familiar with all aspects of pharmacy operations. Involved in the negotiation of 340b contracts.
- Manage all aspects of the inventory process.
- Oversaw major facility changes, including a store renovation in 2017 with a \$500,000 budget and a 15-month store expansion with a \$14 million budget.
- Supervise cash accountability, accounting procedures, and audits to ensure compliance.
- Problem solve, create and implement process changes to guarantee future compliance.

**Assistant Store Director**, Cedar Rapids, IA - December 2007-July 2011

- Assist in overseeing all store level operations.
- Instruct, assign, plan and review the work of 75-100.
- Conduct internal quality assurance inspection.
- Completed corporate Management Rotation Program.
- Monitor expenses and recommend cost reduction programs.
- Coordinate store-wide physical inventories and verify accuracy of results.
- Recruit, interview, orientate, coach and mentor new team members.

**Various Team Member Positions**, Macomb, IL and Galesburg, IL - September 1995 – December 2007

## **VOLUNTEER AND BOARD MEMBER EXPERIENCE**

Blue Zones Project Initiative Leader, Cedar Rapids, IA – 2011-2012  
Junior Achievement, Local Board of Directors Member, Waterloo, IA – 2012-2014  
Junior Achievement of Eastern Iowa, Statewide Board of Directors Member, Cedar Rapids, IA – 2013-2014  
Junior Achievement, Volunteer Teacher in Grades K-12, Waterloo, IA and Fort Madison, IA – 2012 to 2018  
Waterloo Conventions and Visitors Bureau Board of Directors Member, Waterloo, IA – 2012-2014  
Fort Madison Chamber and Partners Board Member, Fort Madison, IA – 2015-2016  
PORT of Fort Madison Board Member, Fort Madison, IA – 2016 to 2018  
Member of Fort Madison Rotary Club, Fort Madison, IA – 2015 to 2018  
Mississippi Valley Workforce Development Board Member- Present  
Jobs for the Future – Job Quality extended team member - Present

## **EDUCATION**

**Western Illinois University**, Macomb, IL  
Master of Business Administration, Emphasis in Marketing, 2003  
Bachelor of Business, Human Resource Management, 2002  
Dale Carnegie Graduate, 2009

## **Computing Skills**

Experience with MS Suite, Time Guardian Pro, Great Plains, Kronos, Infinium, CPro and various Corporate Systems.

## \*Contract Management and Authorization Policy

**Reason** - New policy required since the MVWDB is now the local grant recipient. Policy has already been approved by Executive Committee.

**Documents Included** - Policy

**Action Requested** - Approve the new policy



# Mississippi Valley Workforce Development Board

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## Contract Management and Authorization Policy

**Approved Date:** July 11, 2023

**Effective Date:** July 11, 2023

**Amended Date:**

### PURPOSE

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The purpose of this policy is to satisfy the requirements of the Mississippi Valley Workforce Development Board (MVWDB) as the local grant recipient for the Mississippi Valley Workforce Area (MVWA) as designated by the Chief Elected Officials (CEOs) for Workforce Innovation and Opportunity Act ((WIOA) funds. This policy is intended to supplement, but not replace any applicable state or federal laws.

### BACKGROUND

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The CEOs have the ultimate legal authority and liability over fiscal matters involving WIOA funds but have granted MVWDB as the local grant recipient, giving MVWDB the authority for awarding, withdrawing from, or assigning contracts. The following decision-making matrix has been approved by the CEOs and MVWDB.

### POLICY

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#### Decision Making/Signature Authority

- The Executive Director will have the authority to enter into contracts on behalf of the MVWDB as the local grant recipient when contracts are approved by the MVWDB or designated committee, or other documents authorized in the annual operating budget, or to receive funds as outlined in Appendix A.
- The Executive Director will have the authority to serve as the signatory to approve expenditures and expend funds after the annual budget has been set by the MVWDB. Admin expenditures over the amount of \$2,000 will require prior written approval from the board chair that was not previously outlined in the annual operating budget.
- The Executive Director will have the authority to apply for funding and grants that do not have matching requirements without prior MVWDB approval.
- An authorized individual will not enter into any agreement with respect to MVWDB with any association, partnership, or company in which the individual has a financial interest without the prior written approval of the MVWDB.

### CONTRACT MANAGEMENT

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## **Timely Contract Execution/Use of Pre-Agreement Letters**

As a standard operating procedure, subgrant funds are to be obligated and disbursed in accordance with a fully executed contract and/or subcontract. When the risks associated with having a fully executed contract are outweighed by the need to provide services, the use of a pre-agreement letter/letter of intent should be used to clarify expectations and/or provide estimated funding levels until a fully executed contract or contract modification/extension is finalized. Such costs are allowable only to the extent that they will be incurred after the beginning of the contract or extension period. The letter should be executed by the MVWDB before the program start date. At a minimum, the letter should contain the following information:

- A general description of the service to be provided.
- The estimated line-item budget for the project.
- The period of the proposed contract.
- A statement indicating that a fully executed contract or contract modification will be in place within a specified period, e.g., 60 days.
- Names, titles, and signatures of the individuals for both entities planning to enter the proposed contract or contract modification and agreeing to terms outlined regarding negotiated contract costs.

## **Contract Administration and Records**

The MVWDB must maintain a system for contract administration to ensure that service providers and other contractors comply with the terms, conditions, and applicable performance requirements of contracts. The MVWDB must maintain a file on each executed contract sufficient to document the record of the contract, performance against the contract, and payments made.

## **Contract Renewal Process**

Under WIOA Requests for Proposals (RFPs) must be completed every four (4) years for service provider contracts. Awards are normally made for one (1) year with three (3) possible one-year extensions. The executive committee will review contract extensions at the annual April meeting. The following list comprises various considerations before authorizing a contract renewal or extension:

- Request feedback on the provider's intent to continue the contract.
- Review the terms and conditions of the contract to ensure compliance.
- Conduct a spending analysis to determine the prior year's budgeted versus actual amounts.
- Present vendor with a list of concerns, which need to be resolved to see renewal (if applicable)
- Review common measures and achievement of deliverables.
- Review state and local monitoring reports.

*Equal Opportunity Programs/Employer Auxiliary aids and services  
are available upon request for individuals with disabilities.*

Appendix A - Local Grant Recipient – WIOA or OL Funding

Disbursement of Funds	Full MVWDB	MVWDB Executive Committee	MVWDB Executive Director	CEOs
<b>Contracts from Iowa Workforce Development (IWD)</b>	Informed	Informed	Review/ Signatory	Informed
<b>Master contracts for Department of Labor (DOL) or WIOA service providers funded from WIOA annual program allocations</b>	Ratification of Exec. Com. Approval	Approval	Signatory	Approval
<b>All service provider contracts or modifications greater than \$250,001</b>	Ratification of Exec. Com. approval	Approval	Signatory	Informed
<b>All service provider contract modifications of \$25,001 to \$250,000</b>	Informed	Approval	Signatory	Informed
<b>All service provider contract modifications under \$25,000</b>	Informed	Informed	Approval/ Signatory	Informed
<b>Letters of intent for estimated funding allocations to service providers</b>	Informed	Informed	Approval/ Signatory	Informed
<b>Service provider contract extensions</b>	Informed	Approval	Signatory	Informed
<b>Service provider contract modifications per federal, state, or local policy changes</b>	Informed	Informed	Approval/ Signatory	Informed
<b>Agreements with contractors for projects identified in the annual budget</b>	Informed	Informed	Approval/ Signatory	Informed



## \*Additional MOU Partners

**Reason** - Additional partners outside of the WIOA required partners must be approved by the CEOs.

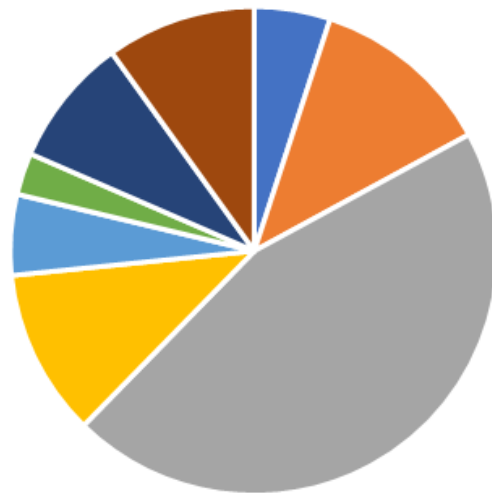
**Documents Included** - List of MOU Partners

**Action Requested** - Approve additional partners highlighted in yellow

<u>MOU Partner List</u>	
Partner	Program
MVWDB	LWDB Board Chair
MVWDB	CLEO
Equus	Title I Adult
Equus	Title I DW
Equus	Title I Youth
Iowa Dept. of Ed	Title II Adult Education and Literacy - Southeastern Community College
Iowa Dept. of Ed	Title II Adult Education and Literacy - Eastern Iowa Community College
Iowa Dept. of Ed	Career Technical Education - Southeastern Community College
Iowa Dept. of Ed	Career Technical Education - Eastern Iowa Community College
Iowa Vocational Rehabilitation Services	Title IV Rehabilitation Act of 1973
AARP	Senior Community Service Employment Program
Job Corps	Job Corps
CA Indian Manpower	Native American Programs
Proteus	National Farmworker Jobs Program
IWD	Unemployment Compensation
IWD	Temporary Assistance for Needy Families
IWD	Jobs for Veterans State Grant
IWD	Re-Entry Employment Opportunities
IWD	Re-Employment Services and Eligibility Assessment (RESEA)
IWD	Ticket to Work
IWD	Title III Wagner-Peyser
IWD	Trade Adjustment Assistance
	Home Base Iowa (HBI)
	Re-Employment Case Management (RCM)
	Dept. of Human Services (DHS)

# CEO Dashboard

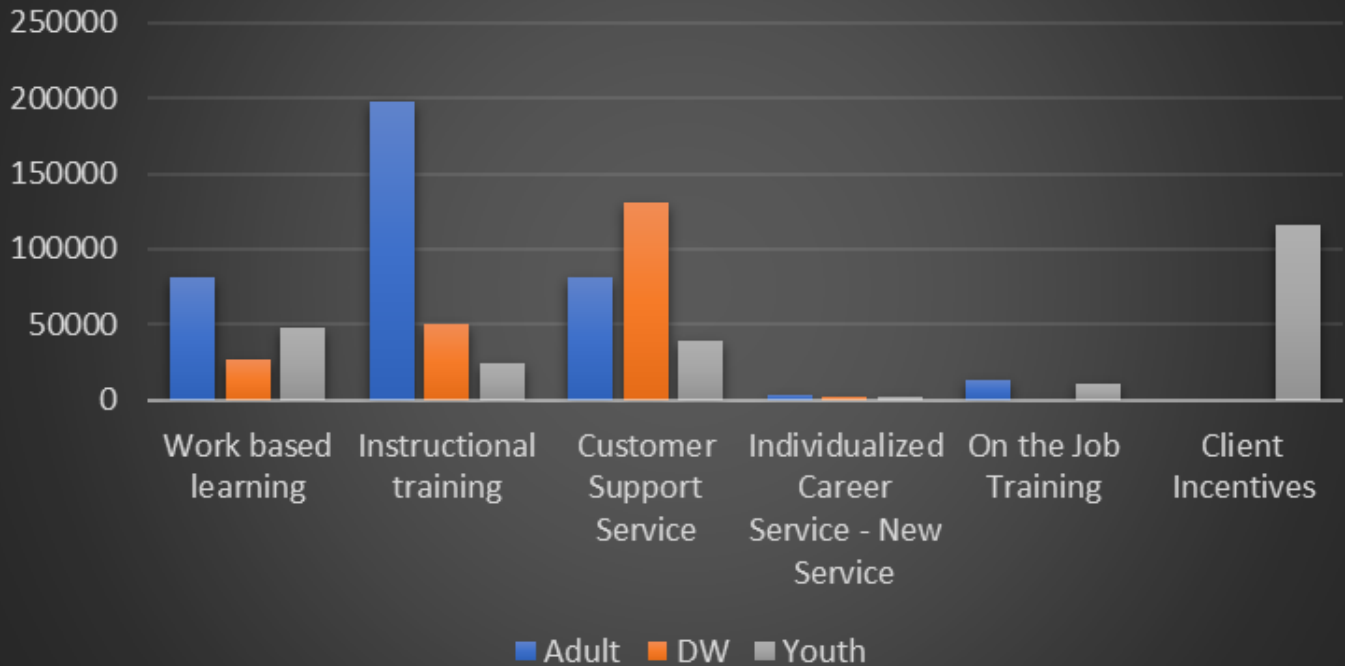
MVWA Population: 386,301



■ Jackson ■ Clinton ■ Scott ■ Muscatine ■ Henry ■ Louisa ■ Lee ■ Des Moines

County	Population	Total Regional Employment	% of MVWA Population
MVWA	386,301	198,788	N/A
Jackson	19,435	6,660	5%
Clinton	46,614	20,880	12%
Scott	174,727	97,431	45%
Muscatine	42,757	23,479	11%
Henry	20,645	9,752	5.3%
Louisa	10,701	4,069	2.7%
Lee	33,088	15,274	8.5%
Des Moines	38,334	21,244	9.90%

## Participant Expenses



Work-based Learning : \$155,206.98

Instructional Training: \$272,604.48

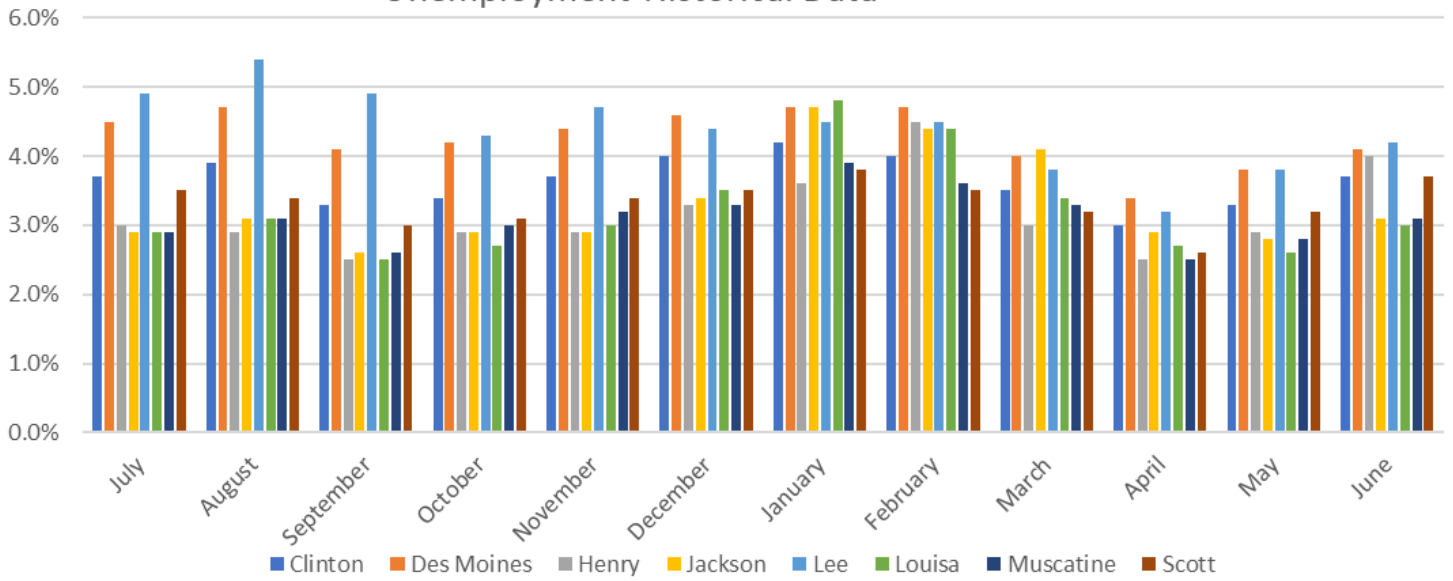
Customer Support Services: \$250,985.45

Individualized Career Services: \$6,252

On-the-Job Training: \$24,196.62

Client Incentives (youth only): \$115,972.61

### Unemployment Historical Data



County	Unemployment Rate	In Labor Force	Unemployed
Jackson	3.1%	10980	350
Clinton	3.7%	22930	850
Scott	3.7%	91030	3330
Muscatine	3.1%	21180	650
Henry	4%	9410	370
Louisa	3%	6070	180
Lee	4.2%	14850	620
Des Moines	4.1%	18570	850

# PY23 Goals

## Adult/Dislocated Worker

- Work Based Learning (WBL) - 40
- Occupational skills training (Scholarships) -100
- Enrollments - 125
- Sector Strategy Events Quarterly - 4
- Customer Satisfaction Level - 90%



## Youth

- Work Based Learning Expenditure - 20%
- Work Based Learning Placements (WBL) - 27
- Occupational skills training (Scholarships) -12
- Enrollments - 60
- Quarterly Outreach Sector Strategy Events - 1 Per quarter
- Customer Satisfaction Level - 90%

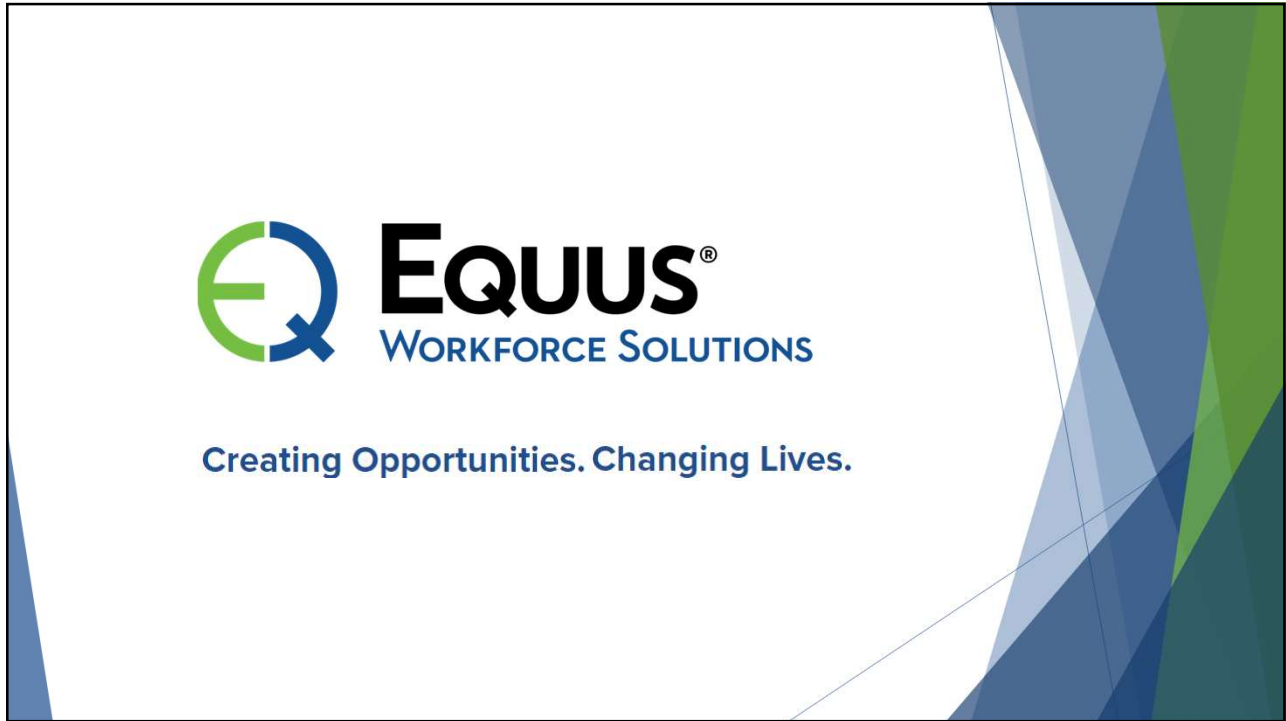
## Iowa *WORKS* Data by County

<b>Title 1 Services Provided by Individual</b>			
<u>County</u>	<u>Distinct Users</u>	<u>Total Services</u>	<u>% of Total</u>
Henry	20	190	4.33%
Clinton	19	152	3.47%
Des Moines	128	1113	25.39%
Jackson	7	80	1.83%
Lee	71	590	13.46%
Louisa	8	61	1.39%
Muscatine	25	258	5.89%
Scott	200	1629	37.17%
Other	30	493	11.24%

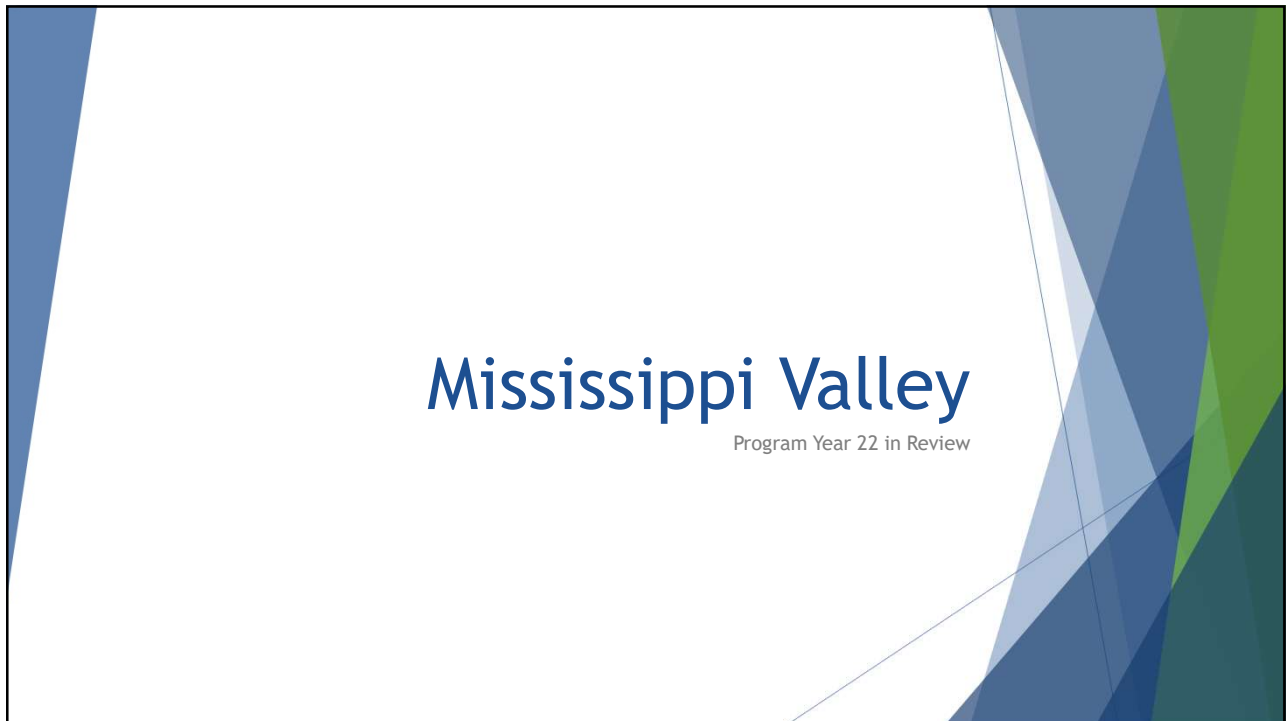
<b>Title III Services</b>		
<u>County</u>	<u>Distinct Users</u>	<u>Total Services</u>
Henry	668	6043
Clinton	690	7643
Des Moines	1545	16414
Jackson	141	1572
Lee	870	11509
Louisa	124	1194
Muscatine	626	7840
Scott	3778	43070



# Title I Annual Report

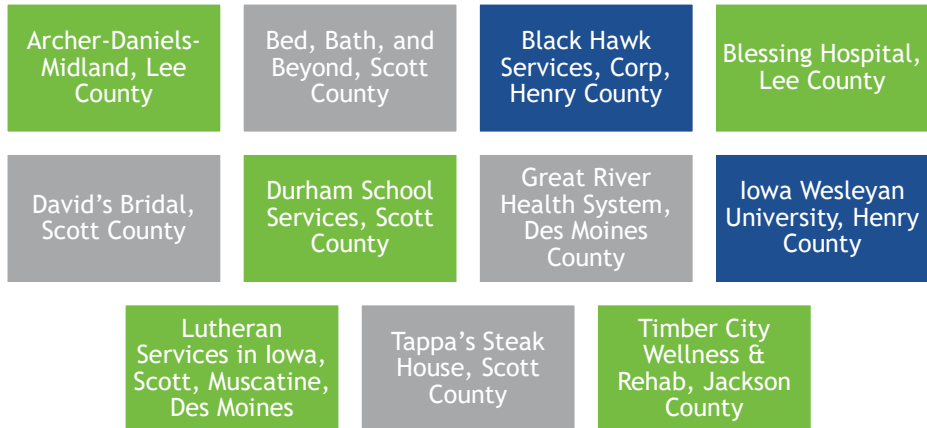


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## Rapid Response



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## Enrollments

	YTD Goal	YTD Actual	% of Goal
Adult	125 (Total)	75	
Dislocated Worker	125 (Total)	63	110%
National Dislocated Worker Grant	40 co-enrolled	127	315%
In School Youth	60 (Total)	18	
Out of School Youth	60 (Total)	105	205%

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## Caseload-June

### Adult

- ▶ 68 Active
- ▶ 113 Follow Up
- ▶ 36.2 Average caseload
- ▶ 11 Exit
  - ▶ 6 Employed
  - ▶ 3 Not employed
  - ▶ 1 Unknown
  - ▶ 1 Stay at Home Mom

### Dislocated Worker

- ▶ 96 Active
- ▶ 64 Follow Up
- ▶ 32 Average caseload
- ▶ 2 Exit
  - ▶ 2 Employed

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## Caseload-June

### Youth

- ▶ 106 Active
- ▶ 68 Follow Up
- ▶ 29 Average caseload
- ▶ 12 Exit
  - ▶ 7 Employed
  - ▶ 3 Not Employed
  - ▶ 1 Unknown

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## Occupational Skills Training

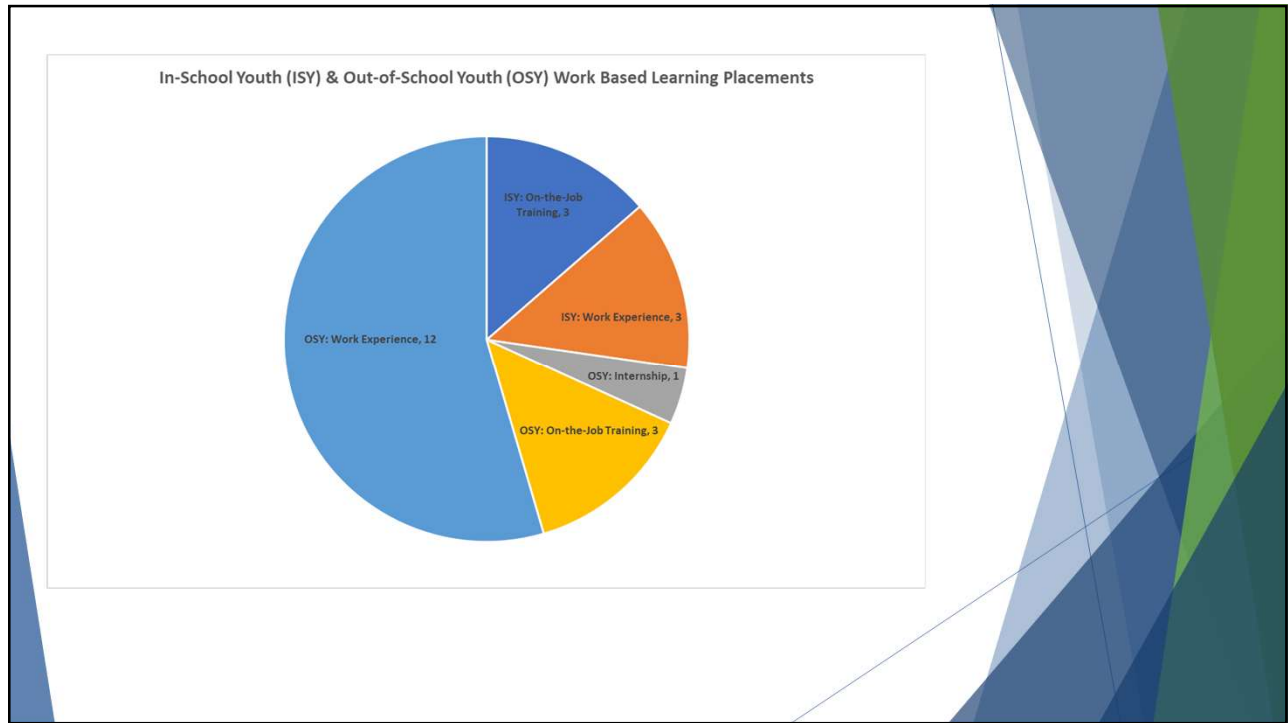
	YTD Goal	YTD Actual	% of Goal
Adult/Dislocated Worker	125	148	118%
Youth	15	30	200%

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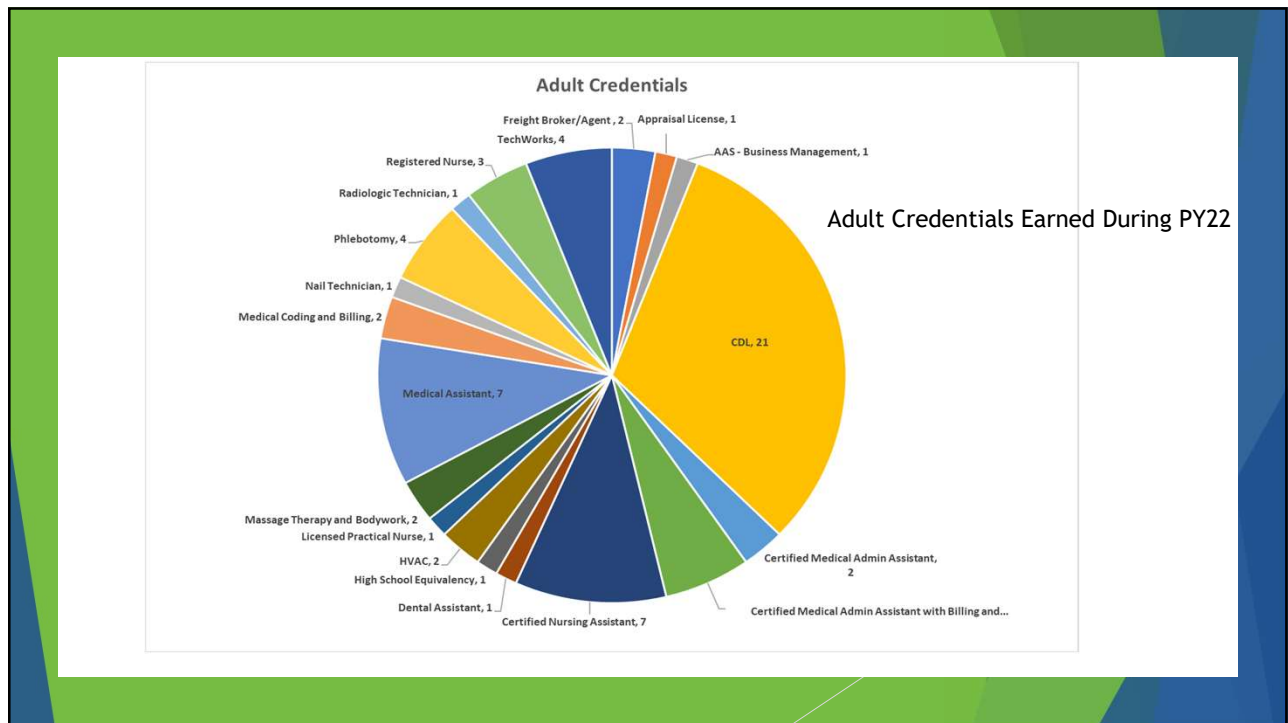
## Work Based Learning

	YTD Goal	YTD Actual	% of Goal
Adult/Dislocated Worker	30	30	100%
NDWG OJT	28	3	11%

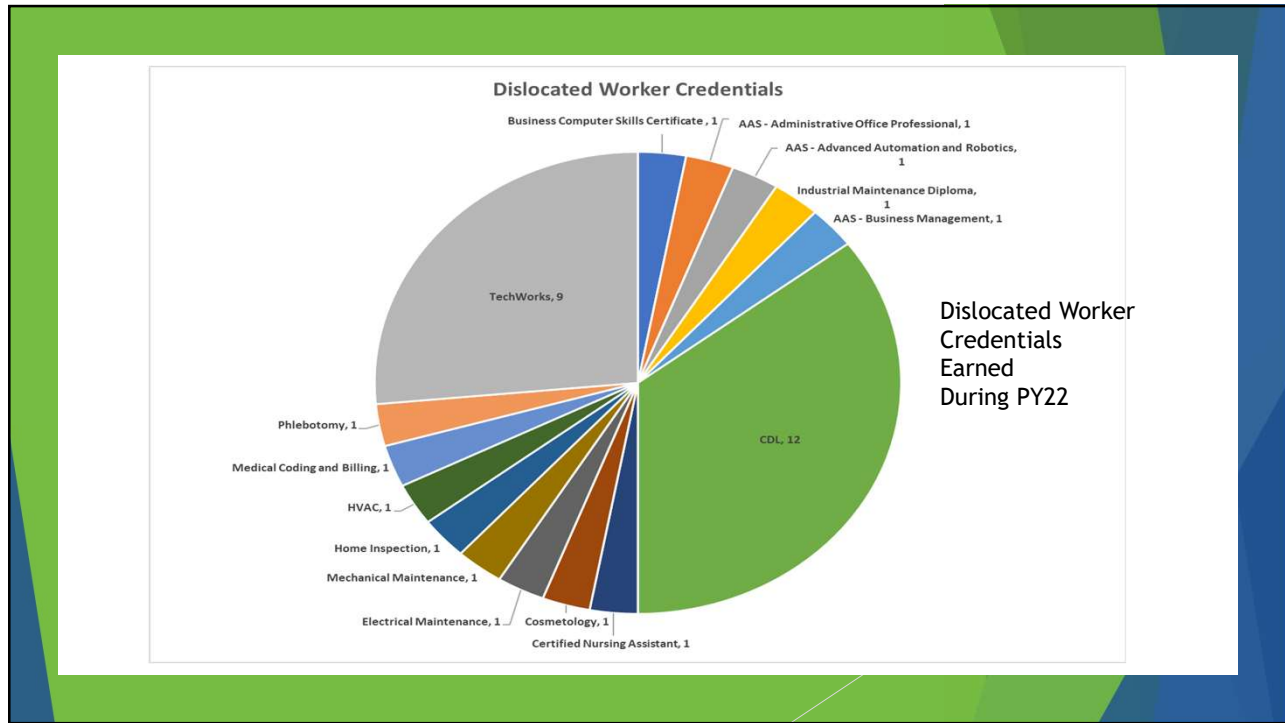
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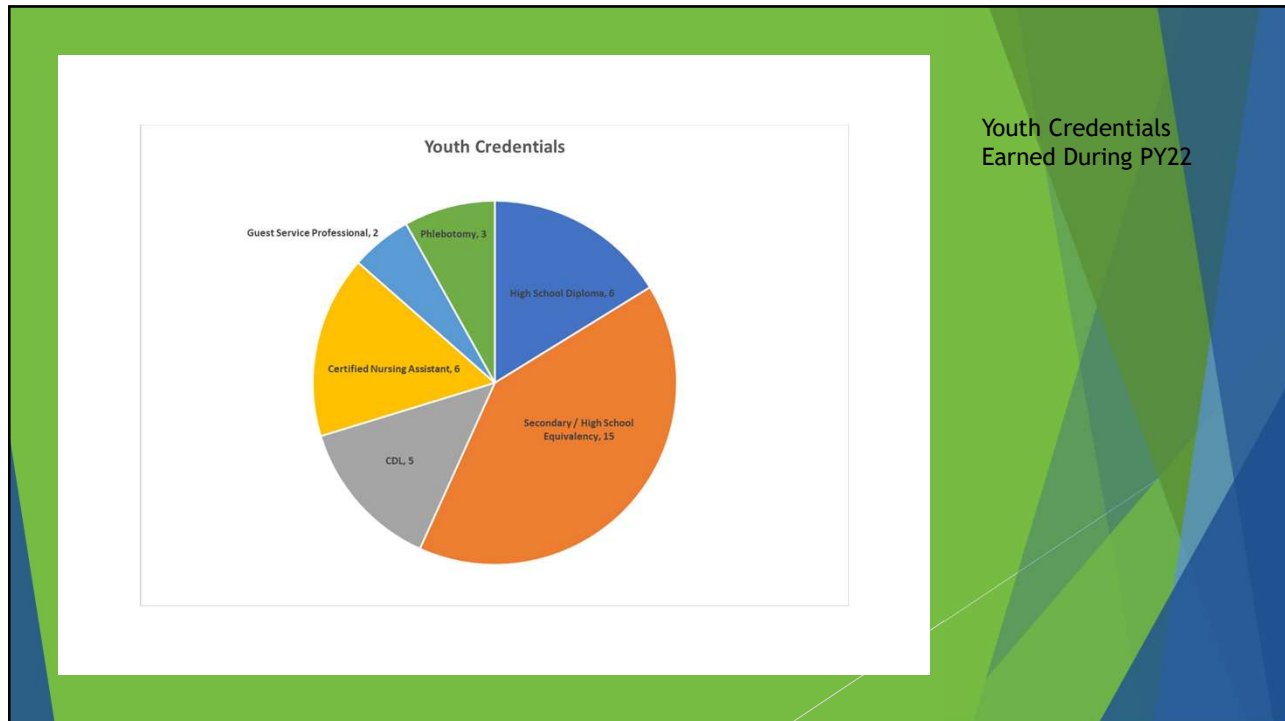
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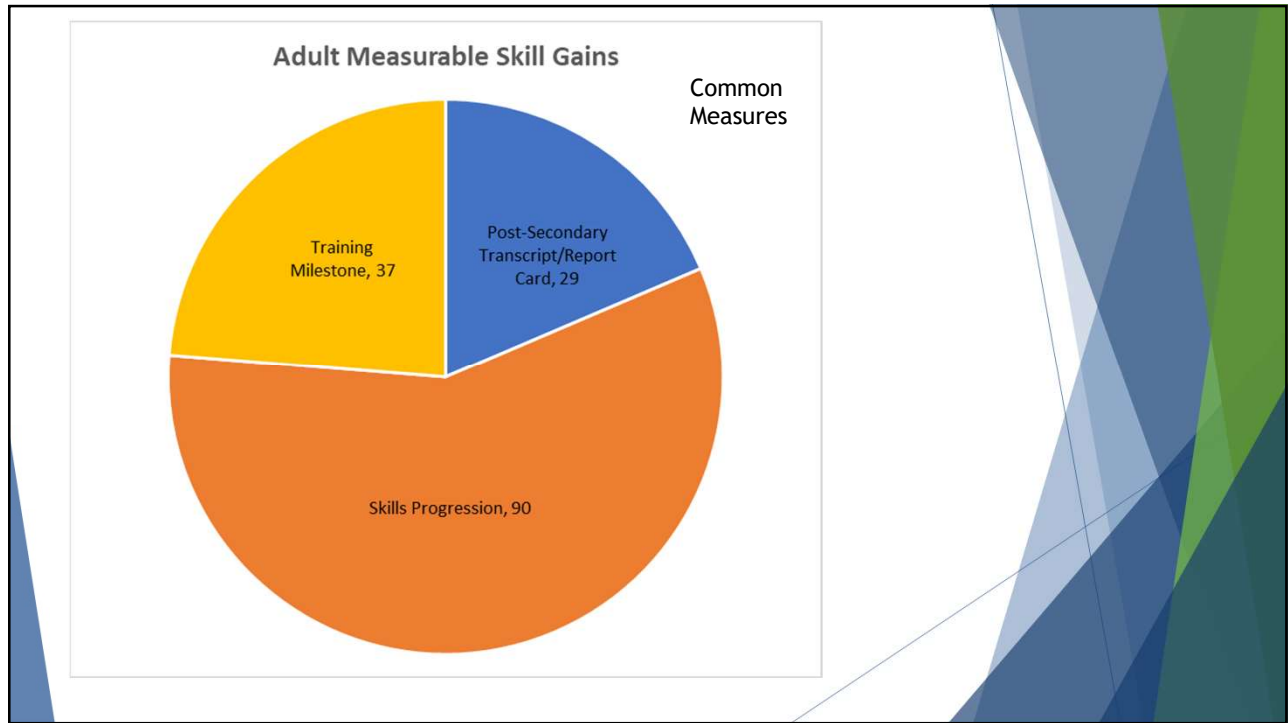
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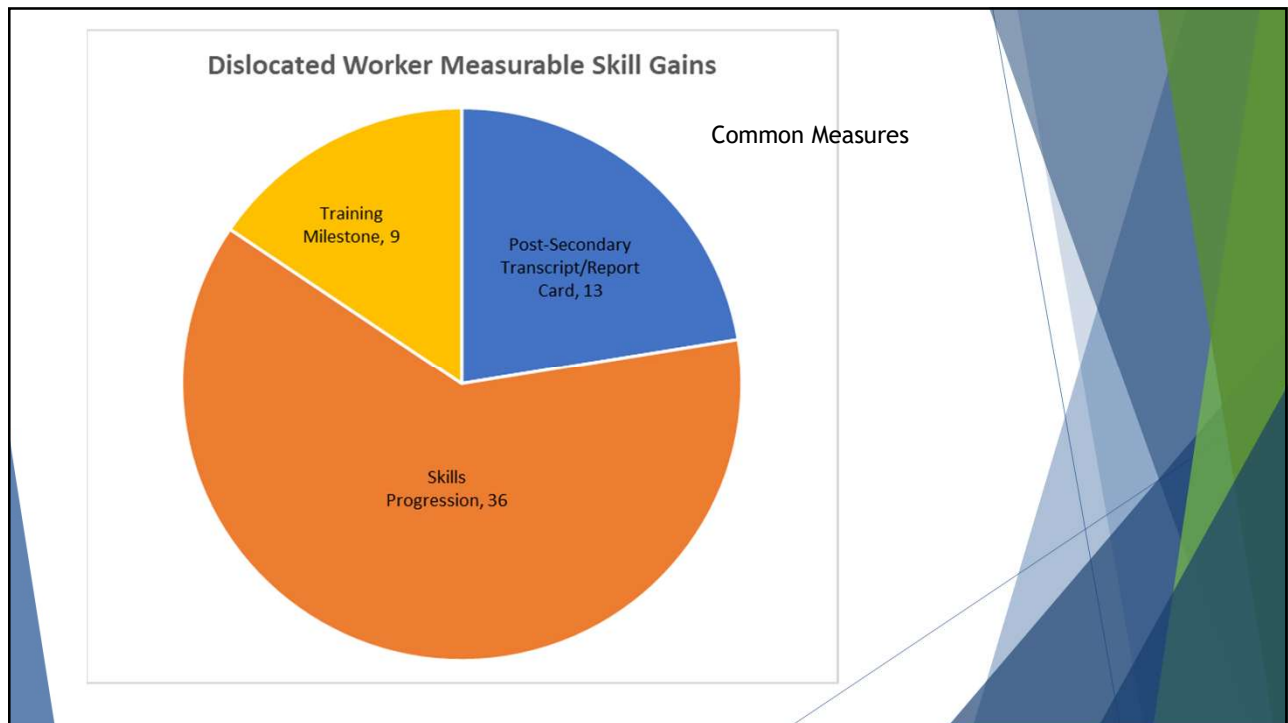
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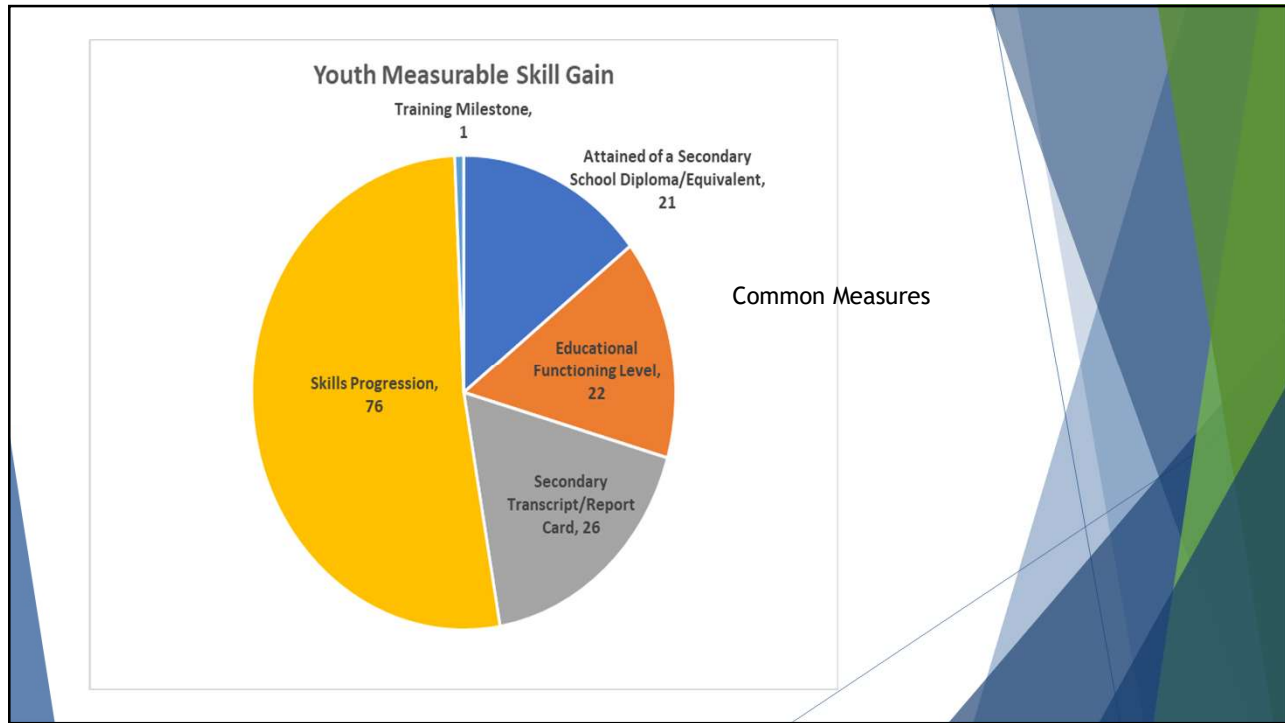


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## Youth Elements Program Year

PY22 Youth Elements	Service	Number of Services Provided	Youth Impacted
1	Tutoring, study skills training, dropout prevention	10	10
2	Alternative secondary school services	5	5
3	Paid and unpaid work experience	22	22
4	Occupational skills training	30	30
5	Education offered concurrently with workforce preparation	0	0
6	Leadership development	16	16
7	Support Services	452	274
8	Adult mentoring	0	0
9	Follow-up services	118	72
10	Comprehensive guidance and counseling	1	1
11	Financial literacy education	8	8
12	Entrepreneurial skills training	0	0
13	Services that provide labor market information	662	590
14	Postsecondary preparation and transition activities	1	1

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## Legacy in Action



323 SURVEYS



94.22% OVERALL CUSTOMER  
SATISFACTION RATE FOR PY22

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## Success Stories-Youth

- ▶ Youth - Six months ago, Accelerate Iowa and Iowa Vocational Rehabilitation worked together to find a first job for a Davenport young adult, Mercedes. Stuff ETC. was happy to partner with both programs to facilitate this exciting opportunity for Mercedes through Accelerate Iowa's Work Based Learning program. Mercedes started her work experience by utilizing our Virtual Reality Headsets. She successfully completed and got paid for her time practicing her skills in hospitality and customer service to prepare for her first day at STUFF ECT. After a few weeks on the job, she brought up her apprehension about getting moved to the cash register to her career navigator, Robert. After that conversation, Robert set up cashier practice for Mercedes in our IowaWORKS office. She practiced her customer service with our staff, made change for purchases, and most importantly, left that day a lot less nervous about being moved to the cash register. After 520 hours of paid experience, Mercedes was hired full time by STUFF ETC., received a pay raise, and will be eligible for benefits. Accelerate Iowa helped her build confidence in herself, try new things, and find a job to add to her resume. This opportunity launched her future in the local workforce. She is now one of the first smiling faces you see when walking into the STUFF ECT. location in Davenport.

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## Success Stories-Adult

- ▶ Adult - While working on her medical billing and coding certification, Employment and Training at IowaWORKS helped Rebecca connect to a career she didn't know she would enjoy. In August of 2022, Rebecca and her career navigator, Sumita, worked together to find her a job closer related to the medical field than the customer service positions she had held in the past. Sumita and Jamie, our business service consultant, met with Rebecca to identify potential work-based learning opportunities. After applying with local hospitals and pharmacies, Main at Locust Pharmacy hired Rebecca and agreed to partner through an on-the-job training opportunity. We were able to support Rebecca by purchasing her required uniform and study book for her pharmacy technician test. We were able to support a local, small business, Main at Locust Pharmacy, by reimbursing part of Rebecca's wages during her agreed upon training period. Rebecca has successfully completed her on-the-job training in February of 2023, she is still studying for her pharmacy technician certification sponsored by Main at Locust Pharmacy and should test around August 2023. She successfully completed her medical billing and coding certification as of July 2023. Rebecca is still working at Main at Locust Pharmacy and intends to use the knowledge she has gained through her occupational skills training and on-the-job training for the rest of her life.

# Business Services Update



## Mississippi Valley Workforce Development Board

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### Business Service Updates

#### **Burlington**

- Success Story!! Siemens came to Hire Talent Tuesday in Burlington, they stated that they plan to ask 70% of the candidates that came to come back for 2<sup>nd</sup> interview.
- Discussion has been started with a local business in Burlington (VO's) about hosting a monthly veteran networking event to help with providing more services to local veterans.

#### **Davenport**

- Registered Apprenticeships! Family Cooling and Heating for HVAC has been approved and another with Iowa American Water Co. for a water operation specialist has made it to DOL but they are wanting to include Union so that will take a bit longer.
- QC Success Fair will be held at St. Ambrose University on August 14<sup>th</sup>.

#### **Both Areas**

- Schools are transferring from Teach Iowa to Iowa*WORKS* for all their job postings, so the Business Engagement Consultant has been working with the schools to get them transitioned to the new program.
- Business Referral Form is up and running!

#### **Rapid Response Services**

- Hearth & Home located in Mount Pleasant 20 office employees were laid off without notice. Multiple attempts to contact to provide services with no response.
- Lutheran Social Services-Loss of the state contract.
  - Number of those affected: Waverly 3, Dubuque 10, Clinton 5, Davenport 20, Muscatine 7, Burlington 19.
  - WIM (Worker Information Meeting) was provided, and several staff have applied for assistance.

# Board Report



# Mississippi Valley Workforce Development Board

## Board Report Prepared for August 15<sup>th</sup>, 2023, CEO Meeting

### General Updates

- Tyler Lanz started as the new Communications Assistant on July 17<sup>th</sup>.
- The Job Quality Academy and Workforce Communities of Action initiatives have started and updates will be given at the next meeting.
- Started initial steps on the Memorandum of Understanding and Infrastructure Funding Agreement.
- KWQC news came to the Davenport center to talk about the Retrain and Retain grant. Aired on July 13<sup>th</sup> at 5p, 6p, 10p and the 14<sup>th</sup> at 6a, and noon.
- 26 Retrain & Retain Grant interest forms have been filled out to date and 4 awarded:

Company	Training	# of Employees	Grant Amount
Carl A Nelson & Co	Rig loads and signal cranes.	10	825
Novelis, Inc	Supervisor Fundamentals Effective Training techniques , Supervisor and the Law	20	6150
Black Cat Parts		9	5820
Economy Coating	NDT Inspection Training.	9-10	9745.2

### Executive Committee and Full Board Approvals

- PY23 Deliverables
- General Budgets
- One Stop Operator Key Performance Indicator Report for Q4.
- Revisions to procurement policy
- Revisions to Retrain & Retain Grant Policy
- Revisions to Support Services Policy
- New Subaward Closeout policy
- New Contract Authorization and Management Policy

### Upcoming Activities

- August 21<sup>st</sup> in-person full board meeting at the Davenport Center
- Presentation at ISAC on August 24<sup>th</sup> about Local Workforce Development Boards
- Determining local area in-demand industries at the August full board meeting.
- Annual local board training on November 30<sup>th</sup> in Burlington. The main focus will be on workforce strategic planning.