



# Mississippi Valley Workforce Development Board

## Executive Committee Agenda

Tuesday, July 12, 2022, at 5:00 p.m.

Join Zoom Meeting

<https://us02web.zoom.us/j/89984623069?pwd=NDVsVzN4bzN5anRpUExrVG5PcmV0dz09>

Meeting ID: 899 8462 3069 Passcode: 899588

One tap mobile: +13126266799,,89984623069# US

Called to Order	Dennis Duke	
Roll Call	Phyllis Wood	
*Excused Absences	Dennis Duke	
*Approval of Agenda	Dennis Duke	page 1
*Approval of Previous Minutes	Dennis Duke	pages 2-4

### Standing Reports

Operations Committee Report	Matthew Nicol	page 6
*OJT Policy Mod		page 8-16
Finance Committee Report	Lori Bassow	pages 18-19
Youth Committee Report	Jacob Nye	page 21
*WEP VR Plan		pages 23-29

### New Business

*Q3 OSO KPI Report	Robert Ryan	pages 31-33
*One Stop Certification Teams	Robert Ryan/Miranda Swafford	page 35
*Annual Inventory Report	Phyllis Wood	pages 37-47
*Contract Mod – Property Clause	Miranda Swafford	pages 49-50
*Inventory System	Phyllis Wood	none
*PY22 Budgets	Miranda Swafford	pages 52-55
*PY21 Monitoring Reports	Miranda Swafford	pages 57-79
*Annual ADA Assessment Reports	Cindy Whalen	pages 81-84
*Travel Policy Modification	Miranda Swafford	pages 86-93
Other Business		
Public Comment		
Adjourn	Dennis Duke	

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

### Accommodations

Accommodations are available upon request for individuals with disabilities. If you need an accommodation, please contact: Miranda Swafford [director@mississippivalleyworkforce.org](mailto:director@mississippivalleyworkforce.org) or at 319-759-8980



# Mississippi Valley Workforce Development Board

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## Executive Committee Meeting Minutes

Tuesday, June 7, 2022, at 5:00 p.m.

**Members Present:** Dennis Duke, Mathew Nicol, Lori Bassow, Kirby Phillips, Cindy Whalen, and Jacob Nye

**Members Absent:** None

**CEOs Present:** Jack Willey

**Staff Present:** Miranda Swafford, Executive Director, Liz Rodriguez, Associate Director, and Phyllis Wood, Executive Assistant

**Service Provider Staff Present:** Kendra Schaapveld, Project Director

**One Stop Operator:** Robert Ryan

### **CALLED TO ORDER**

Duke called the meeting to order at 5:00 p.m.

### **QUORUM**

The committee had a quorum to conduct business.

### **EXCUSED ABSENCES**

There were no absences.

### **APPROVAL OF AGENDA**

Nicol made a motion to accept the agenda as presented, seconded by Phillips, the motion carried.

### **APPROVAL OF MINUTES**

Nicol made a motion to approve the previous meeting minutes, seconded by Phillips, the motion carried.

## **Standing Reports**

### **OPERATIONS COMMITTEE**

Nicol stated the committee would be looking at the OJT policy and social media strategy. He will also be chairing the youth committee for the state workforce board.

### **YOUTH COMMITTEE**

Nye had nothing to report as the Youth committee had not met since reporting out to the full board last month.

## **FINANCE COMMITTEE**

Bassow reported she was not at the May finance committee meeting but reviewed the updates in the packet.

### **New Business**

#### **\*PY22 STAFF SALARY INCREASES**

Duke reviewed the proposed salary increases for MVWDB staff. Duke pointed out the Associate Director would receive the same proposed raise only to align with the funding year and new contract processing with Muscatine County. Nicol made a motion to approve the staff salary increases of 3.5% for the Executive Assistant and Associate Director and a 5.3% raise for the Executive Director, seconded by Nye, the motion carried.

#### **VIRTUAL REALITY PROPOSAL**

Swafford informed the group the Youth program has a very significant budget. Nicol had demoed the proposed devices at the NAWB convention. Schaapveld reviewed the proposal to purchase 20 of the headsets, putting 10 in each center. Nicol asked about the length of the contract. Schaapveld said they were looking to sign a two year all access contract with the provider. Equus would transfer \$100,000 from salary to equipment to cover the expense.

#### **\*YOUTH BUDGET MODIFICATIONS**

Nicol made a motion to approve the youth budget modification moving \$100,000 from salary to equipment, seconded by Whalen, the motion carried.

#### **\*PROJECT BUDGET MODIFICATIONS**

Swafford requested \$3000, from unobligated funding in the Youth program would go into board staff salary to cover expenses that are billable as WEX. Whalen made a motion to approve the program budget modifications, seconded by Nye, the motion carried.

#### **PY 22 DRAFT BUDGETS**

Swafford reviewed the budgets as an informational component not requiring action. Swafford noted the carryover amounts are estimates but the program funding is final. Bassow asked about the telephone line-item increase. Swafford noted the change covers the approved monthly stipend for cellular services for board staff.

#### **PY22 MEETING SCHEDULE**

Wood reviewed the proposed schedule for the executive board noting three potential conflicts with Federal holidays. The committee decided to move the conflicted meetings to the second Tuesday for those months. The committee decided the October meeting would be their in-person meeting, in Muscatine at HNI Training Facility at 5:30pm. Swafford stated the in-person meeting would be a special agenda. The executive committee would probably have Michelle McNertney as the guest speaker. Swafford also suggested the full board would have their in-person meeting in May 2023.

### **OTHER BUSINESS**

Swafford provided an update on the fiscal agent transition. IWD does require SEIRPC to closeout the program year. There will be two FAs through August 15. We must make an addendum for those 45 days and the maximum cost of those services. SEIRPC will process all transactions through June 30 and CIJDC will process all expenses July 1 forward. There will be separate funding available to SEIRPC and CIJDC so there is no chance of double withdrawals nor cross withdrawals.

### **PUBLIC COMMENT**

There was no public comment.

### **ADJOURN**

Nicol made a motion to adjourn, seconded by Nye, the motion carried, and Duke adjourned the meeting at 5:45 p.m.

# Operations Committee Report



## Mississippi Valley Workforce Development Board

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### **Operations Committee Meeting Report for MVWDB Prepared for July 12, 2022, Executive Committee Meeting**

#### **Committee Highlights**

- Approved On-The-Job Training Policy Revisions
  - Simplify and streamline the process for businesses and participants
- Voted a Chair and Vice-Chair
  - Nicol remains Chair for another program year
  - Parchert was voted into the Vice-Chair role
- Rodriguez and Ryan are working to improve their presence with the Business Services Team by attending their meetings. Ryan will be including a presentation at the October in-service training day to inform the group about the roles and responsibilities of the board and one-stop operator.
- Voted on the One Stop Certification Standards assessment and evaluation teams. The board needs to appoint two board members to the evaluation teams, one for the Davenport center and one for the Burlington center.

# On-the-Job Training Policy Revisions



# Mississippi Valley Workforce Development Board

## On-the-Job Training (OJT) Policy

Approved Date: September 28th, 2020

Effective Date: July 1, 2020

Amended Date: January 25, 2021

### A. Purpose

1. This policy establishes requirements to operate the On-the-Job Training (OJT) program under the Workforce Innovation and Opportunity Act (WIOA) in the Mississippi Valley Workforce Development Area (MVWA).

### B. Definition

1. On-the-Job Training (OJT) is training by an employer that is provided to a paid participant while engaged in productive work to develop specific occupational skills or obtain specialized skills required by an individual employer that the participant does not already possess.
2. OJT is a "hire first" program; the OJT participant becomes an employee of the company at the start of the training program.
  - a. The employer is required to certify the intention to retain the OJT participant after the reimbursed training period if the OJT participant accomplished the specific occupational skills to be learned as stated in the OJT contract.
  - b. OJT contracts can be written with employers from the public, private non-profit or private-for-profit business sectors.
  - c. WIOA service providers, including but not limited to Business Services Consultant(s) and Career Navigator works in partnership to facilitate the OJT.

### C. Priority of Services

1. Priority of Service will be followed as defined in the MVWA Local Plan.

### D. OJTs for Employed Workers

1. OJTs may be written for employed workers when the following additional criteria are met:
  - a. The employee is not earning a self-sufficiency wage as defined in the local plan; and

Style Definition: Heading 3: Font: 11 pt, Space After: 8 pt, Line spacing: Multiple 1.08 li

Style Definition: Title1: Line spacing: Multiple 1.08 li

Commented [LR1]: Revision 1: This is to ensure references to these titles are understood throughout the policy -

Commented [LR2]: Revision 2 - Better aligned with state requirements



b. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy or other appropriate purposes identified in the local plan.

c. Documentation of the appropriateness including the assessment (participant and employer/business), contract, training plan, progress, skill evaluation, invoices, and other financial records, etc. must be documented in the data management system.

~~2. OJT can also be provided for currently employed individuals not earning a self-sufficient wage or not earning wages sufficiently comparable to or higher than wages from previous employment. OJTs may be written for employed workers when the following additional criteria are met:~~

~~d. The employee is not earning a self-sufficiency wage as defined in the local plan; and~~

~~e. The OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy or other appropriate purposes identified in the local plan.~~

#### **E. OJTs and Registered Apprenticeship**

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1. OJT contracts may be written with registered apprenticeship programs or participating employers in registered apprenticeship programs for the OJT portion of the registered apprenticeship program.

#### **F. OJT Employer Eligibility**

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1. **Temporary Staffing Agencies:** OJTs may not be written with temporary staffing agencies or employee-leasing firms for positions that will be "hired out" to other employers for probationary seasonal, temporary, or intermittent employment. The only exception is when the OJT position is with the staffing agency itself and not a position that will be "hired out."
2. **Reverse Referrals:** In situations where an employer refers an individual to WIOA Title I services for eligibility determination with the intent of hiring that individual under an OJT contract, the individual referred to the program may be enrolled in an OJT with the referring employer only when the below is true. Board members and committee members are eligible to provide reverse referrals taking into consideration that meeting eligibility requirements and consumer choice are still required.
  - a. The referring employer has not already hired the individual.
  - b. An objective assessment and an IEP or ISS have been completed which support the development of an OJT with the referring employer.

3. **Participant Supervision:** Potential employers must be able to demonstrate their ability to train participants. The person(s) providing instruction and guidance to the OJT participant must be capable of delivering instruction consistent with the employer's needs and must have the time away from his/her other duties to provide the needed training and supervision. For example, a truck driving position where the driver drives alone or without immediate supervision or training would not be appropriate for OJT. To document this, the WIOA service provider **case manager** will document this in the **OJT Contract participant's training plan**.

4. **Employer's Performance:** Service providers may not form agreements with OJT employers who, in two or more previous agreements, which were active within the preceding 18 months, failed to:

a. Retain at least 75% of the participants trained (excluding those who voluntarily resigned, were terminated for cause in accordance with the employer's personnel practices or released due to unforeseen business reversals); and

b. Provide continued long-term employment for those who were retained (6 months or longer upon completion of agreement) with wages, benefits (including scheduled pay increases and health insurance); and

c. Provide working conditions to participants at the same level and to the same extent as other employees working a similar length of time and doing the same type of work.

#### 5. Excluded employers

a. Prior to re-contracting with an OJT employer, the past performance of that employer must be reviewed.

b. An OJT contract must not be entered into with an employer who has previously exhibited a pattern of failing to retain at least 75% of OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as similarly situated employees.

i. OJT participants who voluntarily quit, are terminated for cause, or are released due to unforeseeable changes in business conditions need not result in termination of employer eligibility for future OJT contracts.

c. An employer that has been excluded from OJT contracting because of the requirement(s) described above may again be considered for an OJT placement one year after that sanction was imposed.

d. In this re-contracting situation, if the employer fails to retain the participant after the OJT ends, and there is no apparent cause for dismissing the employee, the employer must not receive any future OJT contracts.

e. MWWA may reconsider the employer for participation in the program if they can demonstrate they have taken appropriate corrective action to comply with WIOA.

#### G. Ineligible Occupations

**Commented [LR3]:** Revision 3 – Consolidating requirements in one document – contract – as opposed to many different documents.

**Commented [LR4]:** Revision 4 – reflects state language, simpler method of tracking those employers who should be excluded using board's original guidance (75% retention of OJT participants)

1. Specific Vocational Preparation (SVP) ratings indicate how long it takes a worker to learn how to do the job at an average performance level. SVP numbers assigned to each job have been pre-determined by the Department of Labor (DOL).

Commented [LR5]: Revision 5 – Uses SVP as criteria for ineligible occupations

2. The specific vocational training used to determine an SVP includes training done in:

- a. vocational schools
- b. the military
- c. by apprenticeships
- d. organized in-plant training
- e. on-the-job training by another qualified employee, or
- f. experience learned in other jobs.

3. There are nine SVP levels: the higher the SVP number the more training needed to learn the job. The SVP levels represent the following amount of training.

- a. SVP 1- a short demonstration
- b. SVP 2 - up to one month
- c. SVP 3-up to three months
- d. SVP 4-three months to six months
- e. SVP 5-six months to one year
- f. SVP 6-one to two years
- g. SVP 7-two to four years
- h. SVP 8-four to ten years
- i. SVP 9-over ten years

4. The SSA uses these SVP ratings to determine skill level:

- a. Jobs with SVP ratings of 1 or 2 are considered unskilled.
- b. Jobs with SVP ratings of 3 or 4 are considered semi-skilled.
- c. Jobs with SVPs greater than 4 are skilled.

2-5 OJT contracts must not be written for the following occupations:

- a. jobs with SVP ratings of 1 or 2 or
- b. those jobs that require employees to sign a non-compete agreement;

- c. jobs used to assist, promote, or deter union organization;
- d. jobs in which the principal source of income is tips, commissions or piecework;
- e. one in which an employer would typically be able to train a new employee in the first few days or weeks on the job;
- f. jobs for commission salespersons, casino or other gambling establishment, aquarium, zoo, golf course, swimming pool, seasonal workers;
- g. those jobs that are intermittent or seasonal in nature;
- h. jobs that are entry level retail or fast food.

**Commented [LR6]:** B, C and D kept from previous list

**H. OJT Payment and Training Length**

1. Payment of WIOA Title I funds to employers is compensation for the extraordinary costs of training participants, including costs of classroom training and compensation for costs associated with the lower productivity of such participants.
2. Payment rate and rate considerations:
  - a. The maximum amount of an OJT contract allowed is \$12,500 per program 10,000.
  - b. The employer is reimbursed up to fifty percent (50%) of the participant's wage rate.
  - c. The employer can be reimbursed up to seventy-five percent (75%) of the wage rate of the participant if any of the following criteria are met:
    - i. The characteristics of the participants, taking into consideration whether they are individuals with barriers to employment, their length of unemployment, and their current skill level.
    - ii. The OJT is with a small businesses with less than 200 employees.
    - iii. In other circumstances a waiver can be submitted to the MVWD Board to request the seventy five percent (75%) wage rate reimbursement.
    - iv. Preference will be given to skilled trades and advanced manufacturing in the Local Area when funds are limited.
    - v. Other circumstances will be considered on a case-by-case basis.
  - d. Wages are considered to be monies paid by the employer to the participant. Wages do not include tips, commissions, piece-rate based earnings or non-wage employer fringe benefits.
  - e. Any shift differentials or shift rate changes will be negotiated, clarified, set and included in final OJT contract.
  - f. Payment for overtime hours and holidays is only allowable in accordance with local policies.
  - g. Holidays may be used as the basis for OJT payments only if the participant actually works and receives training on the holiday.

**Commented [LR7]:** Revision 6 - Reflects changes in TJB Policy

**Commented [LR8]:** Revision 7 – clarifies original language and criteria to allow for easier determination of when 75% wage reimbursement is allowable.

**Commented [LR9]:** Revision 8: To meet the needs of employers and participants.

**Commented [LR10]:** Revision 9: This is to ensure flexibility for employers and participants and that OJT meets the needs of those parties.

**I. OJT Contracts**

1. ~~The Business Services Consultant works in partnership with the Career Navigator to facilitate OJT.~~ OJT must be provided through a contract to provide a structured occupational training opportunity for the OJT participant to gain the knowledge and competencies necessary to be successful in the occupation in which they receive training.
2. The contract must be completed and signed before the OJT participant starts working. [20 CFR 680.720 (b). The WIOA service provider or other designated staff, and the employer must sign an OJT contract for each OJT participant.
3. An OJT contract must be limited to the period of time required for the participant to become proficient in the occupation for which the training is being provided.
4. No OJT contract will be longer than six (6) months and will not exceed 1040 hours.
5. Appropriate contract length will be determined by considering the skill requirements of the occupation, the academic and occupational skill level of the participant, and the participant's prior work experience.
6. In assessing the time requirements, the WIOA service provider ~~case manager~~ will consider the specific skills needed for that occupation as required by that employer for that job; the normal training time for that occupation as shown by O\*NET, which may be accessed at <http://www.doleta.gov/programs/onet>; and the specific additional skills to be learned by the OJT participant as determined by the assessment of the participant's current skills and experience in comparison to what is required for successful performance in that specific occupation.
7. The Training Length Determination Form will be used to calculate the maximum number of hours allowed for the OJT contract. The actual hours of the contract will be determined by the Training Outline/Plan, which is developed jointly by the OJT supervisor and the WIOA service provider ~~case manager~~.
8. Rationale for OJT. The rationale for the OJT training, including duration, must be entered in the participant's Individual Employment Plan (IEP).
9. Under no circumstances can an OJT contract be written for a participant if the hours of training required for the position in which the participant is to be trained is determined to be less than 160 hours.
10. The hours specified must be considered as a departure point for determining actual training hours.
11. If the total number of training hours needed to successfully train a participant for the OJT position cannot be provided during the maximum contract length allowable, as many training hours as possible must be provided.
12. The number of training hours for a participant may be increased/decreased based upon the individual circumstances of the participant and will be approved by the board/executive committee on a case-by-case basis.

Commented [LR11]: Linked Revision 1: Moved to Section B. c.

#### **J. OJT Contract Required Provisions**

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1. Wages paid to OJT participants must be at least the prevailing entry wage for any specific entry occupation in the community. If the employer operates under a collective bargaining agreement, the wage and benefits must be those specified in that union agreement and the job opening must be cleared with the appropriate union.
2. Compliance with requirements of the Civil Rights Act with respect to equal opportunity in employment for the OJT position as well as comply with all federal, state, and local laws.
3. OJT participants hired under this program will be subject to the same personnel policies, rules and regulations, and afforded the same benefits as the other participants of the company.
4. Employers must carry Workers' Compensation Insurance and make Federal and State Tax withholdings as required by law. In addition, the individual OJT participant payroll tax records and receipts for services (if applicable) must be maintained and available for review for a minimum period of three years after the end of the training period.
5. Conditions of employment and training will be in full accordance with all applicable federal, state, and local laws (including but not limited to child labor, health and safety laws), and be appropriate and reasonable in regard to type of work undertaken and the proficiency of the participant.
6. Employer certifies that the OJT participant will not displace any regular employee and certifies that no person was displaced as a result of relocation of the current business in the 120 days prior to signing the Pre-Award Review form.
7. The OJT occupation must not involve religious or political activity.
8. The OJT must be conducted at the employer's place of business or another site, and may not be subcontracted.
9. No employer may hire an OJT participant if a member of the OJT participant's immediate family is engaged in an administrative capacity for that employer.
10. The OJT employer must certify that neither the employing company nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or excluded from participation by any federal department or agency.
11. The OJT Training Outline/Plan must be written for skills that the OJT participant does not already possess. Care must be given to check the OJT participant's work history, and to document that the new skills to be learned are different, more difficult, and/or unique to the new job, and are therefore necessary to perform the new job tasks.
12. ~~Modification provision~~ Contract clause for modification provision in case there are situations where the OJT contract would need to be modified.
13. Participant hourly wage rate and allowable training hours (work zones as noted on O- Net).
14. Agreement on the maximum amount of reimbursement and/or allowable costs of training.
15. Provision for wage increases based upon successful achievement of training goals as provided to other similar employees, if applicable.

**Commented [LR12]:** Revision 10. Clarification from original language

16. A requirement for job retention beyond the training period.
17. A provision for termination due to lack of funds or lack of participant attendance or unsatisfactory progress.
18. Duration of contract.
19. Contract termination clauses.
20. Provision for allowing for MVWA or their designee, state and federal staff monitoring and review of training records.

#### **K. Progress Review**

1. The appropriate **WIOA service providers** ~~Business Services Consultant/WIOA Navigator case manager~~ will conduct monthly progress **review visits** by the employers desired mode of communication, to include but not limited to phone, email, or web conferencing software. The first visit will be in person to ensure compliance with provisions of the contract and that training is being provided as outlined in the contract, unless there are extenuating circumstances. If the progress review is conducted in person, the **WIOA service provider(s)** ~~counselor~~ will ask to see the Training Progress form to ensure that the employee is making progress toward the completion of the Training Outline/Plan.
2. The service provider will maintain a contract file on each OJT with the following documentation:
  - a. Pre-Award Review form
  - b. Original OJT Contract and any modified contracts.
  - c. Proof of Workers Compensation Insurance coverage
  - d. Training Length Determination Form
  - e. Invoices and supporting documentation
  - f. Training Progress form (both interim and final)
  - g. Job description
  - h. Justification of OJT participant's failure to satisfactorily complete (if applicable)

**Commented [LR13]:** Revisions 11, 12, 13: all clarification revisions

#### **L. Monitoring Requirements**

1. Each OJT ~~The board will conduct on-site monitoring on a bi-annual basis to~~ **contract must be**

**Commented [LR14]:** Revision 14: simplified the policy to link to consistent language in Monitoring Policy (M and N below)

monitored on-site at least once during the contract period.

2. The purpose of this review is to:

- a. ensure evaluate compliance with contract terms and
- b. to help solve any concerns between the WIOA service provider(s), Employer(s), and/or OJT Participant.

3. While on-site the monitor will verify that:

- a. the participant is receiving the training contracted for in the agreement, and
- b. that the participant is not required to engage in activities prohibited by WIOA

4. The monitor must also review the participant's attendance records to ensure that the participant is attending and succeeding in the training, and review employer records to assure that the participant is receiving proper wages and that the employer is withholding taxes and paying workers compensation.

#### **M. Monitoring**

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OJT monitoring will be completed to ensure compliance with federal, state and local policy and follow the procedures outlined in the local Monitoring and Oversight Policy.

#### **N. Exceptions**

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Any exceptions to this policy must be approved by the MVWDB Executive Director in consultation with the Operations Committee Chair and must be documented in both the participant's and OJT Employer's files.



# Finance Committee Report

## **Finance Committee Report**

**July 2022**

### **Financial Updates**

The board will have two fiscal agents through August 15 because IWD is requiring SEIRPC to close out the PY21 expenses. There will be different funding streams available to each fiscal agent to prevent duplicative draws. IWD will conduct financial monitoring of SEIRPC July 12-13. There is a new employer of record agreement to reflect the change in fiscal agent and with updated staff salary amounts.

### **May Invoices Approved**

- Adult \$73,018.52
- DW \$38,863.25
- Youth \$81,777.05
- Rapid Response \$4,746.33
- NDWG \$8,390.80.
- One Stop Operator \$7,725.54
- SEIRPC 112.5 hours invoice for \$6,829.76

### **Approvals and Discussions**

- Approved admin and program budgets for recommendation to the executive committee.
- Reviewed support services policy increases in certain categories. Tabled until next meeting so more data can be gathered to make informed decisions.
- Elections - Chair Lori Bassow and Vice Chair Cory Bergfeld
- Insurance financial monitoring report approved with no findings.
- Bank account balance is \$25,745.40. The new fiscal agent will be taking over the management of these funds in the next couple of months.

**Financial Report**  
**Expenditures Through 5/31/2022 (91.66% through Program Year)**

Stream	Expended	% of Total Available	Total Available	Remaining Balance	80% + Carryover Goal to be Spent by 6/30/2022	% of 6/30/2022 Goal Met	Amount to be Recaptured if not spent by 6/30/2022
Admin	246,894.78	51.82%	476,448.36	229,553.58	412,438.16	59.86%	156,397.36
Adult	900,189.93	71.39%	1,260,967.64	360,777.71	1,031,843.84	87.24%	115,348.64
Dislocated Worker	465,286.00	65.47%	710,737.27	245,451.27	606,632.27	76.70%	190,212.27
Youth	717,110.25	44.31%	1,618,418.93	901,308.68	1,377,611.59	52.05%	404,083.93
<b>Ends 6/30/2022</b>							
Nat. DW Grant	45,622.25	15.76%	289,419.00	243,796.75	277,946.94	16.41%	289,419.00
Rapid Response	69,599.16	96.67%	72,000.00	2,400.84	72,000.00	96.67%	72,000.00
<b>Total</b>	<b>2,444,702.37</b>		<b>4,427,991.20</b>	<b>1,983,288.83</b>			<b>1,227,461.20</b>

**Equus Program Expenditure Updates through 5/31/2022**

Adult	Budgeted	% of Total	Actual Expenditures	% of Current Expenditures	Notes
Total P&O	\$ 569,154.25	49.89%	\$ 449,964.67	53.81%	<i>P&amp;O = Personnel and Operations</i> 20% WEX is on the total of all youth expenditures not just funds contracted to Equus
Total Participant	<b>\$ 571,589.75</b>	50.11%	<b>\$ 386,304.41</b>	46.19%	
<b>Total</b>	<b>\$ 1,140,744.00</b>	100.00%	<b>\$ 836,269.08</b>	100.00%	
DW	Budgeted	% of Total	Actual to Date	% of Total	
Total P&O	\$ 425,630.00	72.56%	\$ 298,396.77	74.31%	
Total Participant	<b>\$ 160,959.00</b>	27.44%	<b>\$ 103,173.92</b>	25.69%	
<b>Total</b>	<b>\$ 586,589.00</b>	100.00%	<b>\$ 401,570.69</b>	100.00%	
Youth	Budgeted	% of Total	Actual to Date	% of Total	
OSY					
Total P&O	\$681,752.01	56.17%	\$ 440,250.73	86.44%	
Total Participant	\$532,048.00	43.83%	\$ 69,090.40	13.56%	
<b>Total</b>	<b>\$1,213,800.01</b>	100.00%	<b>\$ 509,341.13</b>	100.00%	
ISY	Budgeted	% of Total	Actual to Date	% of Total	
Total P&O	187,763.00	66.84%	133,840.45	96.58%	
Total Part.	93,172.00	33.16%	4,733.97	3.42%	
<b>Total</b>	<b>280,935.00</b>	100.00%	<b>138,574.42</b>	100.00%	
					% of 20% Goal
20% WEX Requirement	PY20 Required	<b>137227.20</b>	137,227.20	100.00%	
	PY21 Required	\$66,159.82	5740.23	8.68%	

# Youth Committee Report



# Mississippi Valley Workforce Development Board

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## **Youth Committee Report** **Prepared for July 12, 2022 – Executive Committee Meeting**

### **Items of Discussion**

- Voted on Chair and new Vice Chair roles. Jacob Nye will continue as chair and Rebecca Ruberg was elected to the Vice Chair role.
- Schaapveld presented the opportunity to incorporate virtual reality into career exploration and training with the focus to be on WEX experiences.
- Although there is no funding being returned to the state this year, there is \$670,000 that must be spent on youth services by June 2023 or we will lose funding.
- Youth ambassador program will begin. Youth ambassadors will attend Youth Committee meetings to earn financial economic opportunity credits and learn leadership skills.

# Work Experience Virtual Reality Plan



## Mississippi Valley Workforce Development Board

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### **Work Experience Virtual Reality Plan**

#### **Purpose**

Transfr Virtual Reality (VR) is an innovative work-based learning addition to maximize results of our youth work experiences, leading to greater results and job ready candidates for long-term stability and development of career pathways.

#### **What is VR Training?**

VR training simulates the type of training that takes place in a physical training facility. VR simulations teach trainees in the same way that experts teach novices — through trial and error — with the guidance of a digital coach. VR safely replicates an on-the-job environment anywhere — in rural areas, at home, or in the classroom.

VR hands-on simulation-based training helps youth develop the skills they need to secure well-paying jobs in high-demand fields. Construction, Manufacturing, Healthcare, Transportation Distribution & logistics, Automotive & Aviation and Hospitality & Tourism are the current industries offered through VR headsets. The skills gap in the manufacturing sector exists because of an outdated view or lack of awareness of the opportunities in the automotive and construction industries and other skilled trades. Over half of the manufacturing workforce is set to retire by 2030, creating millions of openings for jobs that do not require a 4-year degree.

Subject matter experts ensure the immersive training simulations are designed to be authentic, efficient, engaging, and effective, and aligned with industry standards. Trainees master skills at their own pace and receive direct one-to-one feedback from the digital coach.

Demand for talent is growing in industries like manufacturing, transportation, construction and skilled trades – professions that can often lead to long-term economic and career stability. However, students often lack awareness of the education or training options they need to get started.

The full Catalog of Career Exploration Options and Virtual Training Facility Courses can be found at <https://docsend.com/view/3tchewxytffvqayq>

#### **VR Coaching and Supervision**

A digital coach guides trainees through modules where they interact with realistic tools and environments and receive live feedback based on their actions. The one-to-one relationship of digital coach to trainee provides a level of consistency and personal attention that is not possible

in a traditional teacher-student environment, and also gives trainees the freedom to fail without being subject to peer pressure. Trainees develop the confidence they need to:

- complete the training within the simulation, and then
- transfer their new skills to a real-world environment

### **VR Performance Dashboard**

The VR Dashboard provides instructors with granular, customizable views into learner progress and overall class performance, allowing them to tell who needs more help and what challenges may be common across all learners.

Within the VR experience the software continuously evaluates trainee engagement and quantifies their behaviors as they progress towards skill mastery. This intelligent system is driven by machine learning algorithms that capture behavioral trends in the trainee's performance.

The Virtual Training Facility platform gives instructors insights into class performance and where students and trainees exceed or face challenges. The dashboard's customized scoring fosters mastery through repetition of actions and skills. It assigns weights to different steps depending on their individual importance or difficulty. Instructors can quickly review student performance (score, status, time spent, number of attempts, etc.) and make changes as required.

The platform combines a learner's in-game play data with real-world business data, providing a ground truth in understanding how users' performance in the training system is related to real-world outcomes. It then provides trainees with personalized feedback that helps them become more proficient.

### **Benefits of Incorporation of VR Training:**

- Increased confidence for youth participants
- Youth learn skills to enter the workforce more quickly and set them up for long term success in unsubsidized employment
- Reduces training time and material costs compared to traditional methods.
- Immersive simulations are also shown to have higher retention when compared to video tutorials, slide presentations, or other presentation styles.
- Adding VR to existing programs helps increase local employment levels and lower cost and risk for employers.
- Build training programs that scale and quickly deliver ROI.
- Reduce onboarding training costs for employers
- Close the skills gap for roles businesses are trying to fill
- Create alternative pathways to career success for Youth job seekers with barriers
- More attractive to employers than traditional WEPs



### **Local Incorporation of VR Technology into WEP Programming**

- VR can be used during a pre-WEP activity to provide job readiness training to prepare youth for an experiential learning activity.
- VR simulation will provide the youth participant with opportunities for career exploration and skill development.
- VR simulation can be used as part of the classroom training or orientation to introduce new skills to Youth during their WEP experience.
- VR will be incorporated into an employers onboarding process when applicable or as the first number of hours of a WEP or group session while the youth is being paid

### **PY22 Goals**

- Place 60 youth into work experience opportunities
- Build VR training into WEP training plans
- Focus on placing WEP in-demand industries in MVWA in Construction, Manufacturing, Healthcare, Transportation Distribution & logistics, Hospitality & Tourism. (See Appendix A)
- Increase businesses willingness to participate in WEP placements.
- Measure the Youth's mastery of skills through the VR dashboard from pre-test to post test.
- Measure the participants satisfaction with the VR training component of their WEP.
- Develop model and standards that can be replicated in other Youth WEP programs.

### **Monthly Youth Reports Will Include:**

- Data on number of Youth participated
- Number of Youth interested in each career
- Survey results
- Number of hours Youth participated
- And other instructor dashboard metrics

### **Transfr Training and Implementation Support**

Transfr provides Training and Implementation Consulting and Technical Support through their Career Success Manager and Customer Support Specialist

#### *Implementation Consulting*

- On a quarterly basis the Career Success Manager will meet with the board and Project Director staff to review data retrieved from the dashboard.
- Monthly the Career Success Manager will meet with local Operations Managers who provide strategic guidance and direct oversight of the program. These Individuals own the overall success of the Transfr program and lead the strategic use, adoption, and best practices of Transfr within the MVWA.

- Local Instructors will be the subject matter expert and individuals responsible for instruction and / or oversight of training with participants. There will be two instructors in each center who will be Transfr certified after completion of the Training Workshop.

*Technical Support Provided for Instructors by Transfr*

- Initial Training Workshops
- Train-the-Trainer Workshop
- Supplemental Self-Paced Training Resources

**VR as an Evidence Based Approach**

*Alabama Lockheed Martin Student Pilot Program*

- Nearly half of the trainees scored at or above 90% on the real-world transfer test with no prior human coaching or hands-on experience with the tools.
- Less than 25% of Learning and Design professionals would recommend their own corporate learning program; traditional corporate training is often seen as ineffective and boring.
- The VR pilot revealed that 80% of trainees reported TRANSFR Inc’s VR training was engaging.
- 75% of trainees self-reported that they preferred TRANSFR Inc’s VR training to traditional training.
- The average increase in proficiency scores from pretest to posttest was 8.6%, increasing from 82.6% on the pretest to 91.2% on the posttest.
- Training in VR was found to be effective at improving content knowledge at half the cost to traditional learning approaches with a trainer.
- 75% of trainees said they felt like the TRANSFR training they experienced prepared them for what they will face on the job.

*Jumpstart Alabama Overview*

JumpstartAL is a virtual reality-based workforce development initiative created through a public-private partnership with the state’s most influential organizations to develop the next generation of skilled labor by using innovative technology solutions. JumpstartAL is working with TRANSFR to make hands-on training simulations available to schools in order to successfully meet the state’s current and future need for skilled labor.

- The program offers scalable work-based training simulations.
- Pre-apprenticeship training in virtual reality that enables a job seeker to practice the hands-on skills required for the job.
- Provide a virtual training center that makes training for in-demand skills available on demand.

*Altec Case Study*

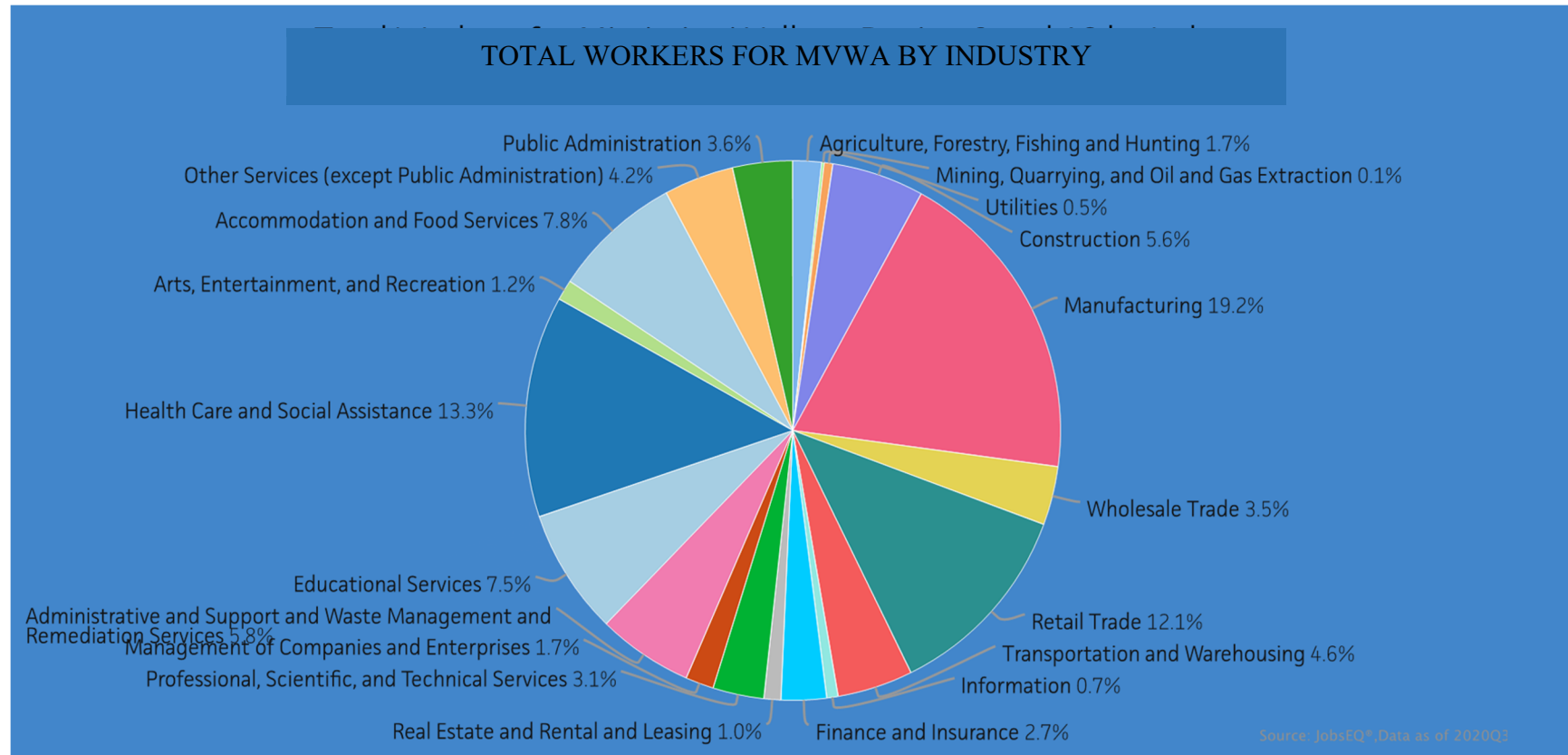
Transfr is building a classroom-to-career pipeline that reduces burdens related to cost, scalability, and risk. The hands-on, simulation-based modules provide people with the marketable skills they need to secure careers that offer livable wages, upward mobility, and sustained success.

- In 2020, 16 Shelton State cohorts were completed, preparing 79 students for their next career move.
- 1,244 total TRANSFR training simulations were completed with an average mastery score of 92% throughout 16 cohorts.

## Appendix A

### Local Area Labor Market Information

According to JobsEQ the largest sector in the MVWA is Manufacturing, employing 37,200 workers. The next-largest sectors in the Local Area are Health Care and Social Assistance (25,763 workers) and Retail Trade (23,420).



*Employment data are derived from the Quarterly Census of Employment and Wages, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3.*

The fastest growing sector in the Local Area is expected to be Health Care and Social Assistance with a +0.6% year-over-year rate of growth. The strongest forecast by number of jobs over this period is expected for Health Care and Social Assistance (+157 jobs), Professional, Scientific, and Technical Services (+12), and Accommodation and Food Services (+10). Despite Manufacturing jobs contracting during this period the annual demand is still the largest in MVWA with a total annual demand of 3,453 jobs.

NAICS	Industry	CURRENT			5-YEAR HISTORY		1-YEAR FORECAST				
		Empl	Avg Ann Wages	LQ	Empl Change	Ann %	Total Demand	Exit s	Transfer s	Empl Growth	Ann % Growth
31	Manufacturing	37,200	\$61,980	2.33	-1,178	-0.6%	3,453	1,423	2,436	-406	-1.1%
62	Health Care and Social Assistance	25,763	\$46,051	0.90	-1,283	-1.0%	2,586	1,194	1,235	157	0.6%
44	Retail Trade	23,420	\$29,166	1.18	-1,705	-1.4%	2,867	1,376	1,738	-247	-1.1%
72	Accommodation and Food Services	15,184	\$16,533	0.97	-1,326	-1.7%	2,463	1,085	1,367	10	0.1%
23	Construction	10,783	\$55,987	0.95	-1,964	-3.3%	1,021	379	676	-34	-0.3%
48	Transportation and Warehousing	8,834	\$50,086	0.96	-186	-0.4%	904	399	540	-35	-0.4%

Source: JobsEQ®

Employment data are derived from the *Quarterly Census of Employment and Wages*, provided by the Bureau of Labor Statistics and imputed where necessary. Data are updated through 2020Q2 with preliminary estimates updated to 2020Q3. Forecast employment growth uses national projections adapted for regional

# OSO Key Performance Indicator



## Mississippi Valley Workforce Development Board

### One Stop Operator Key Performance Indicator Report

**Executive Committee Meeting Date:** \_\_\_\_\_ **Period of Performance:** \_\_\_\_\_

The determination of whether or not one-stop operator performance measures have been met will be made on a quarterly basis by the executive committee. To be determined to have satisfactory performance, the sub-recipient must show satisfactory progress in 13 of the 16 measures shown below as determined by the executive committee at the January, April, July, and October 2022 meetings.

Key Performance Indicators	Y or N	One Stop Operator Comments
1. Document at least 5 hours quarterly learning partner programs.		<ul style="list-style-type: none"> <li>• April 20th 2022 GeoSol Training 1.0 hour</li> <li>• April 25 2022 DOL RESEA Training 1.5 hours</li> <li>• May 4<sup>th</sup> 2022 Marco Adasme MSFW 1.0 hours</li> <li>• May 18<sup>th</sup> 2022 OWDS training 0.5 hours</li> <li>• June 8<sup>th</sup> 2022 Rapid Response 0.5 hours</li> <li>• June 30<sup>th</sup> 2022 DOL Trade Sunset 1.0 hours</li> </ul> <p style="text-align: right;"><b>Total 5.5 hours</b></p>
2. Coordinate 3 core partner meetings quarterly.		04/26/22 05/24/22 06/28/22
3. Coordinate 1 required partner meeting quarterly.		05/10/22
4. Implement and maintain a customer satisfaction survey of at least 85%.		The 13 responses received in the months of April, May, and June February and March indicated a satisfaction rate of 92.3%.
5. Provide updates on strategies to improve information sharing among partner programs.		I act as the “point person” for information from the MVWDB and/or IWD to be disseminated among Core and Required Partners, as well as any Partner updates that I receive.
6. Provide updates on relationship building activities to assist in the integration of one-stop partner programs.		In addition to the regularly scheduled partner meetings, I worked closely with the Burlington Title II program to facilitate the establishment of Title II programming in the local AJC. I am also working individually with the various partners as we complete the WINTAC integration appraisal process and begin the One-Stop Certification process.

7. Show quarterly progress on the implementation of a referral process.		In the months of April, May, and June, 250 partner referrals were made. The form and the associated process continues to undergo fine-tuning as we move ahead.
8. Provide monthly reports on referral tracking and follow up activities.		The referral form is linked to a tracking spreadsheet that I maintain. Every Monday I review referrals from the previous week and send out reminders to partner leadership to confirm follow-up.
9. Coordinate a minimum of 2 cross training activities each quarter.		04/27/22 Presentation on Title II services in person and via Zoom. 06/22/22 Presentation on Proteus services in person and via Zoom.
10. Demonstrate collaboration on workforce partner activities.		I coordinate and schedule Business Service Teams meetings and I attend outreach events and job fairs. This past quarter I have begun working with the BSTs on a new strategy document. I also attend all Disability Access Committee meetings.
11. Provide updates on outreach strategies progress.		In addition to the abovementioned BST strategy document, I have surveyed the Core Partners on their primary outreach goals and objectives, who their main target population is, and what the three most important messages that an outreach strategy should contain. These responses are being collated and incorporated into a draft outreach plan, per MOU Attachment F.
12. Provide updates on social media strategies.		All my reports to CEOs, MVWDB, and committees have a page dedicated to reporting metrics on the local area's various social media pages. Social media is a standing agenda item on the BST agendas as well. I will be collaborating with the board as we move forward with a local area social media strategy.
13. Provide updates regarding issues pertaining to customer complaints that are substantive to the required partners operating in the comprehensive, affiliate, and satellite One-Stop Centers.		Only one complaint was fielded this past quarter (via the Customer Satisfaction Survey) and it was forwarded on to the Davenport Title III Operations Manager.
14. Submit monthly reports to the board and CEOs.		I submit and present reports to the board and CEOs every time they have met; I regularly submit and present invoices to the Finance Committee.
15. Attend committee meetings monthly as designated by the board.		I regularly attend Operations, Youth, and Finance Committee meetings
16. Meet with the executive director on a weekly basis.		I meet with the executive director every week to review progress and make future plans.



Board Chair Signature: \_\_\_\_\_ Date: \_\_\_\_\_

# One-Stop Certification Roster

# ONE-STOP CERTIFICATION ROSTER

PROPOSED ASSESSMENT AND EVALUATION TEAMS					
Affiliation	Name	Burlington Assessment Team	Davenport Assessment Team	Burlington Evaluation Team	Davenport Evaluation Team
Board Business Member	Joyce Stimpson			X	
Board Business Member	Matt Nicol				X
Board Executive Director	Miranda Swafford	X	X		
Board Associate Director	Elizabeth Rodriguez	X	X		
One-Stop Operator	Robert Ryan	X	X		
Title I	Kendra Schaapveld			X	
Title II Burlington	Martha Bell	X			
Title II Davenport	Scott Schneider		X		
Title III Burlington	Carolyn Farley				X
Title III Davenport	Jana Wittenberg			X	
Title IV Burlington	Cynthia Whalen				X
Title IV Davenport	Chad Pratz		X		
Title IV IDB	Travis Robinson	X			

# Inventory Report

## *Summary*

Attached is the updated inventory spreadsheet of all equipment being tracked at this time. Our current policy dictates we tag and track equipment purchased with a cost over \$50. Currently, we are tracking over 250 items. The Burlington and Davenport centers were visited by the MVWDB executive assistant (EA) on June 29 and June 20 respectively. The project supervisor (PS) at each center had their own inventory list. The EA and PS physically verified the presence of equipment. Any equipment that was offsite with an employee had photos of the equipment tag sent to the PS who shared to the EA. These photos are attached at the end of the report. For equipment removed from the inventory list, there will be disposal certificates. We are still waiting on guidance from the state for disposal process. For equipment loaned to participants, I would have included the signed laptop checkout forms, but they are inaccessible at this time due to the outage of the IowaWORKS system. There is equipment in Des Moines for which I have no way to verify at this time and those items are highlighted on the spreadsheet. There are five items in Des Moines. Not all new equipment was reported to the MVWDB via reports to the Operations committee.

## *Davenport Inventory*

On June 20, 2022, the EA visited the Davenport AJC to meet with their PS to complete a physical inventory audit. There were two docking stations, tags 205 and 215, that could not be located. Upon investigation the power blocks for the laptops had been labeled by mistake. These labels were relocated to the appropriate docking stations. Items 031 and 034, both Microsoft Surface Pro 4 units, are non-functioning and we are awaiting disposal guidance from the state to properly process them and remove them from inventory. Items 060, 061, 063, 064, and 067 are Thinkpad laptops loaned out to participants. Items 167 and 168, ViewSonic monitors, have been moved to storage. Items 158 and 165, Dell laptops, were sent to Des Moines on March 10, 2022, to be reimaged. Item 165 has been listed as a desktop, but a lookup of the serial number revealed it to be a laptop Latitude 5590. Items 189 and 201 through 223 are new items added to the inventory list.

## *Burlington Inventory*

On June 29, 2022, the EA visited the Burlington AJC to meet with their PS to complete a physical inventory audit. Item 029, Thinkpad laptop, is currently checked out to a participant. There are still 20 untagged items in storage from the previous service provider awaiting disposal guidance from the state. Item numbers 190 and above are new equipment added to the inventory list.

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Burlington	001	no tag	n/a	HP OfficeJet 250 Mobile Printer	Jennifer Schuster	6/29/2022
Burlington	002	no tag	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	003	no tag	n/a	Brother Printer MFC-L3770	Shannon Weaver	6/29/2022
Burlington	004	no tag	n/a	Brother Printer	Bob Ryan	6/29/2022
Burlington	005	no tag	n/a	Brother Printer	Tabytha Seigfried	6/29/2022
Burlington	006	no tag	n/a	Brother Printer	In Storage, in Burlington	6/29/2022
Burlington	007	no tag	n/a	HP OfficeJet 250 Mobile Printer	Toby Estrada	6/29/2022
Burlington	008	no tag	n/a	Filing Cabinet	Tabytha Seigfried	6/29/2022
Burlington	009	no tag	n/a	iPhone XR F2LYGEDXKXKN	Shannon's office	6/29/2022
Burlington	010	no tag	267456	ASUS Chromebook	Jennifer Schuster	6/29/2022
Burlington	011	no tag	267458	ASUS Chromebook	Michaela Specketer	6/29/2022
Burlington	012	no tag	267454	ASUS Chromebook	Shannon Weaver	6/29/2022
Burlington	013	no tag	267445	ASUS Chromebook	Toby Estrada	6/29/2022
Burlington	014	no tag	267444	ASUS Chromebook	Nicholas Clayton	6/29/2022
Burlington	015	no tag	267446	ASUS Chromebook	Bob Ryan	6/29/2022
Burlington	016	no tag	267448	ASUS Chromebook	Megan Race	6/29/2022
Burlington	017	no tag	n/a	Tempur-Pedic 6400	Nicholas Clayton	6/29/2022
Burlington	018	no tag	n/a	Patronics CS520 Headset	Tabytha Seigfried	6/29/2022
Burlington	019	no tag	n/a	Patronics CS520 Headset	Megan Race	6/29/2022
Burlington	020	no tag	n/a	12 Chromebook Charging Cart	Rapid Response Area	6/29/2022
Burlington	021	no tag	n/a	24 Chromebook Charging Cart	Youth Area	6/29/2022
Burlington	022	no tag	191310	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	023	no tag	191309	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	024	no tag	194308	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	025	no tag	191311	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	026	no tag	191321	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	027	no tag	191319	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	028	no tag	191320	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	029	no tag	191314	CDW-G ThinkPad	Computer cart-Youth area - LOANED to participant MCN	
Burlington	030	no tag	191315	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Davenport	031	no tag	FY1601802	Microsoft Surface Pro 4	Kendra's office	6/20/2022
Davenport	032	no tag	n/a	Canon Scanner/Printer	AD/DW area	6/20/2022
Davenport	033	no tag	n/a	Brother Printer	Jamie McLaughlin	6/20/2022
Davenport	034	no tag	FY1601801	Microsoft Surface Pro 4	Kendra's office	6/20/2022
Davenport	035	no tag	n/a	HP Office Jet 250 Mobile All-in-One	Youth Office	6/20/2022
Davenport	036	no tag	n/a	RICOH SPEC440DN	AD/DW area	6/20/2022
Davenport	037	no tag	n/a	Dell Monitor	Lisa Gisel	6/20/2022
Davenport	038	no tag	n/a	LaserJet Pro M118dw	Brent Schwoebel	6/20/2022
Davenport	039	no tag	n/a	LaserJet Pro M118dw	Litsy Corrales	6/20/2022
Des Moines	Page 38 of 43	WDL04847 JZKPNF2	n/a	Dell Laptop	DES MOINES	Page 38 of 84

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Davenport	041	no tag	267459	ASUS Chromebook	Sumita Amrik	6/20/2022
Davenport	042	no tag	267457	ASUS Chromebook	Hannah Penn	6/20/2022
Davenport	043	no tag	n/a	Brother Printer HL-L2320D	Robert Hummel	6/20/2022
Davenport	044	no tag	267455	ASUS Chromebook	Jamie McLaughlin	6/22/2022
Davenport	045	no tag	267449	ASUS Chromebook	Taylor Longstreth	6/20/2022
Davenport	046	no tag	267451	ASUS Chromebook	Cheryl Tipsword	6/20/2022
Davenport	047	no tag	267450	ASUS Chromebook	Lisa Gisel	6/22/2022
Davenport	048	no tag	267452	ASUS Chromebook	Kendra Schaapveld	6/22/2022
Davenport	049	no tag	267453	ASUS Chromebook	Tyler Weger	6/20/2022
Davenport	050	no tag	n/a	uxor 24 Laptop/Chromebook Charging Ca	Youth Office	6/20/2022
Davenport	051	no tag	n/a	HP P27v G4 9TT20A6#ABA 27" LED Monito	Kendra's office	6/20/2022
Davenport	052	no tag	n/a	Tempur-Pedic 6400	Kendra's office	6/20/2022
Davenport	053	no tag	n/a	Tempur-Pedic 6400	Jamie's office	6/20/2022
Davenport	054	no tag	n/a	Tempur-Pedic 6400	Taylor L's office	6/20/2022
Davenport	055	no tag	191326	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	056	no tag	191324	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	057	no tag	191327	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	058	no tag	191318	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	059	no tag	191323	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	060	no tag	191313	CDW-G ThinkPad	Youth Office - Loaned to participant RC	
Davenport	061	no tag	191332	CDW-G ThinkPad	Youth Office - Loaned to participant KY	
Davenport	062	no tag	191333	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	063	no tag	191331	CDW-G ThinkPad	Youth Office - Loaned to participant TB	
Davenport	064	no tag	191328	CDW-G ThinkPad	Youth Office-Loaned to participant KG	
Davenport	065	no tag	191334	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	066	no tag	191329	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	067	no tag	191312	CDW-G ThinkPad	Youth Office-Loaned to participant AV	
Davenport	068	no tag	191337	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	069	no tag	191336	CDW-G ThinkPad	Youth Office	6/20/2022
Davenport	070	no tag	n/a	HP Color Laser Jet CP5225	Kendra's office	6/20/2022
Davenport	071	no tag	n/a	Tempur-Pedic 6400	Litsy Corrales	6/20/2022
Davenport	072	no tag	n/a	Epson Desktop Scanner	Kendra's office	6/20/2022
Davenport	073	no tag	n/a	Epson Desktop Scanner	Kendra's office	6/20/2022
Davenport	074	no tag	n/a	Epson Desktop Scanner	Tyler Weger	6/20/2022
Davenport	075	no tag	n/a	Epson Desktop Scanner	Kendra's office	6/20/2022
Davenport	076	no tag	n/a	Epson Desktop Scanner	DaShawn Banks	6/20/2022
Davenport	077	no tag	n/a	Epson Desktop Scanner	Brent Schwoebel	6/20/2022
Davenport	078	no tag	n/a	Epson Projector	Accounting Office	6/20/2022
Davenport	079	no tag	n/a	Brother DCP Printer (PA's)	Accounting Office	6/20/2022
Davenport	080	no tag	n/a	LG Monitor 31 (PA's)	Accounting Office	6/20/2022

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Burlington	081	3446	n/a	Epson Desktop Scanner	Shannon Weaver	6/29/2022
Burlington	082	3027	n/a	Topaz Signature Pad	Colton Campbell	6/29/2022
Burlington	083	WDL04838	n/a	Dell Laptop	Jen Schuester (loan)	6/29/2022
Burlington	084	3464	n/a	Epson Desktop Scanner	Shayla Taeger	6/29/2022
Davenport	085	13002	n/a	Epson Desktop Scanner	Colton Campbell	6/20/2022
Burlington	086	3028	n/a	Topaz Signature Pad	Nicholas Clayton	6/29/2022
Burlington	087	93TZP73	no tag	Dell Laptop-IWD	Nicholas Clayton	6/29/2022
Burlington	088	3458	n/a	Epson Desktop Scanner	Nicholas Clayton	6/29/2022
Burlington	089	no tag	5CG34600YG	HP Laptop	Floor -Career Services cubicle	6/29/2022
Burlington	090	3025	n/a	Topaz Signature Pad	Toby Estrada	6/29/2022
Burlington	091	3024	n/a	Topaz Signature Pad	Shayla Taeger	6/29/2022
Burlington	092	WDL04944 3PFH0X2	n/a	Dell Laptop	Shayla Taeger	6/29/2022
Burlington	093	3022	n/a	Topaz Signature Pad	Melissa Mace	6/29/2022
Burlington	094	D82HP73	no tag	Dell Laptop-IWD	Toby Estrada	6/29/2022
Burlington	095	3529	n/a	Epson Desktop Scanner	Melissa Mace	6/29/2022
Burlington	096	3105	n/a	Topaz Signature Pad	Megan Race	6/29/2022
Burlington	097	WDL04845	n/a	Dell Laptop	Megan Race	6/29/2022
Burlington	098	3580	n/a	Epson Desktop Scanner	Megan Race	6/29/2022
Burlington	099	13227	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	100	13226	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	101	13228	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	102	13223	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	103	13222	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	104	13220	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	105	13221	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	106	13225	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	107	13224	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	108	13229	n/a	Chromebook	Rapid Response Area	6/29/2022
Burlington	109	13097	n/a	Dell Dock	Shannon's office (display doesn't work)	6/29/2022
Burlington	110	WDL04837	n/a	Dell Laptop	Shannon's office	6/29/2022
Burlington	111	no tag	191316	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	112	no tag	191317	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	113	no tag	191342	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	114	no tag	191341	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	115	no tag	191338	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	116	no tag	191339	CDW-G ThinkPad	Computer cart-Youth area	6/29/2022
Burlington	117	no tag	267447	ASUS Chromebook	Tabytha Seigfried	6/29/2022
Burlington	118	no tag	n/a	Tempur-Pedic 6400	Michaela Specketer	6/29/2022
Burlington	119	no tag	n/a	HON Chair	Jennifer Schuster	6/29/2022
Burlington	Page 40 of 23	no tag	n/a	HON Chair	Shayla Taeger	6/29/2022



LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Burlington	121	no tag	n/a	3-Drawer File Cabinet	Youth Area	6/29/2022
Burlington	122	3457	n/a	Epson Desktop Scanner	Shannon's Office	6/29/2022
Burlington	123	WDL04844	n/a	Dell Laptop	Shannon's Office	6/29/2022
Burlington	124	3447	n/a	Epson Desktop Scanner	Jennifer Schuster	6/29/2022
Burlington	125	5469	n/a	Monitor	Jennifer Schuster	6/29/2022
Burlington	126	WDL04842	F02NNF2	Dell Laptop	Shannon's Office	6/29/2022
Burlington	127	13095	n/a	New Dock	Shannon's Office	6/29/2022
Burlington	128	24146	n/a	Coat Rack	Bob Ryan	6/29/2022
Burlington	129	5491	n/a	Monitor	Bob Ryan	6/29/2022
Burlington	130	WDL04841	n/a	Dell Laptop	DES MOINES	6/29/2022
Burlington	131	3444	n/a	Epson Desktop Scanner	Tabytha Seigfried	6/29/2022
Burlington	132	3029	n/a	Topaz Signature Pad	Shannon's office - Does not work	6/29/2022
Burlington	133	no tag	2CE2420LD3	HP Laptop	Floor -Far right cubicle lateral	6/29/2022
Burlington	134	5506	n/a	AOG Monitor	Nicholas Clayton	6/29/2022
Davenport	135	3534	n/a	Epson Desktop Scanner	Taylor Longstreth	6/20/2022
Davenport	136	WDL04943 7Z7H0X2	n/a	Dell Laptop	Taylor Longstreth	6/20/2022
Davenport	137	7677	n/a	HP Monitor	Taylor Longstreth	6/20/2022
Davenport	138	7676	n/a	HP Monitor	Taylor Longstreth	6/20/2022
Davenport	139	3067	n/a	Topaz Signature Pad	Taylor Longstreth	6/20/2022
Davenport	140	WDL04846 J1LPNF2	n/a	Dell Laptop	Robert Hummel	6/20/2022
Davenport	141	no tag	n/a	LG Monitor #2 (PA's)	Accounting Office	6/20/2022
Davenport	142	no tag	n/a	ThinkPad Laptop (PA's)	Accounting Office	6/20/2022
Davenport	143	no tag	n/a	Tempur-Pedic 6400	Accounting Office	6/20/2022
Burlington	144	no tag	n/a	ThinkPad Laptop	Toby Estrada	6/29/2022
Davenport	145	3068	n/a	Topaz Signature Pad	Robert Hummel	6/20/2022
Davenport	146	3594	n/a	Epson Desktop Scanner	Robert Hummel	6/20/2022
Davenport	147	7702	n/a	HP Monitor	Robert Hummel	6/20/2022
Davenport	148	7650	n/a	HP Monitor	Robert Hummel	6/20/2022
Davenport	149	5257	n/a	Epson Desktop Scanner	Litsy Corrales	6/20/2022
Davenport	150	11437	n/a	Dell Dock	Litsy Corrales	6/20/2022
Davenport	151	3069	n/a	Topaz Signature Pad	Sumita Amrik	6/20/2022
Davenport	152	3431	n/a	Epson Desktop Scanner	Sumita Amrik	6/20/2022
Davenport	153	WDL04940 FSFH0X2	n/a	Dell Laptop	Sumita Amrik	6/20/2022
Davenport	154	7687	n/a	HP Monitor	Sumita Amrik	6/20/2022
Davenport	155	7688	n/a	HP Monitor	Sumita Amrik	6/20/2022
Davenport	156	3041	n/a	Topaz Signature Pad	Hannah Penn	6/20/2022
Davenport	157	3641	n/a	Epson Desktop Scanner	Kenzie Failyer	6/20/2022
Des Moines	158	WDL04835 433YNF2	n/a	Dell Laptop	Sent to Des Moines 3/10/2022	
Davenport	159	7692	n/a	HP Monitor	Hannah Penn	6/20/2022
Davenport	160	7693	n/a	HP Monitor	Hannah Penn	6/20/2022

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Davenport	161	WDL04942 5BQ80X2	n/a	Dell Laptop	Jamie McLaughlin	6/22/2022
Davenport	162	7697	n/a	HP Monitor	Jamie McLaughlin	6/20/2022
Davenport	163	7698	n/a	HP Monitor	Jamie McLaughlin	6/20/2022
Davenport	164	3413	n/a	Epson Desktop Scanner	Jamie McLaughlin	6/20/2022
Des Moines	165	WDL04941 2B2H0X2	n/a	Dell Laptop	Sent to Des Moines 3/10/2022	
Davenport	166	7756	n/a	Topaz Signature Pad	Brent Schwoebel	6/20/2022
Davenport	167	no tag	VMT212220915	ViewSonic Monitor	Storage	6/20/2022
Davenport	168	no tag	VMT212720234	ViewSonic Monitor	Storage	6/20/2022
Davenport	169	3485	n/a	Epson Desktop Scanner	Kendra Schaapveld	6/20/2022
Davenport	170	13003	n/a	Epson Desktop Scanner	Hannah Penn	6/20/2022
Davenport	171	WDL04840 BD1YNF2	n/a	Dell Laptop	Brent Schwoebel	6/20/2022
Davenport	172	3556	n/a	Epson Desktop Scanner	Lisa Gisel	6/20/2022
Davenport	173	7736	n/a	HP Monitor	Lisa Gisel	6/20/2022
Davenport	174	3065	n/a	Topaz Signature Pad	Tyler Weger	6/20/2022
Davenport	175	2144	n/a	Dell Dock	Robert Hummel	6/20/2022
Davenport	176	no tag	H6WWMH3	Dell Wyse Thin Client	Davenport Youth Space	6/20/2022
Davenport	177	no tag	H6WXMH3	Dell Wyse Thin Client	Davenport Youth Space	6/20/2022
Davenport	178	no tag	H6WYMH3	Dell Wyse Thin Client	Davenport Youth Space	6/20/2022
Davenport	179	no tag	H6WZMH3	Dell Wyse Thin Client	Davenport Youth Space	6/20/2022
Davenport	180	no tag	n/a	Table and four stools	Davenport Youth Space	6/20/2022
Davenport	181	no tag	n/a	Gray couch	Davenport Youth Space	6/20/2022
Davenport	182	no tag	n/a	Black rounded chair	Davenport Youth Space	6/20/2022
Davenport	183	no tag	n/a	Black coffee table	Davenport Youth Space	6/20/2022
Davenport	186	3023	n/a	Topaz Signature Pad	Lisa Gisel	6/20/2022
Davenport	187	WDL04843	n/a	Dell Laptop	Lisa Gisel	6/22/2022
Davenport	188	no tag	K052NW24L0223	Smart Board	Davenport Youth Space	6/20/2022
Davenport	189		270849	Lenova Laptop ThinkPad	Kendra Schaapveld	6/20/2022
Burlington	190	WDL04839	9NRPNF2	Dell Laptop	Shannon's Office	6/29/2022
Burlington	191	WDL04836	6P3TNF2	Dell Laptop	Shannon's Office	6/29/2022
Burlington	192		13TTQG3	Dell Laptop	Michaela Specketer	6/29/2022
Burlington	193		23TTQG3	Dell Laptop	Cindy Anderson	6/29/2022
Burlington	194		33TTQG3	Dell Laptop	Robert Ryan	6/29/2022
Burlington	195			Dell Dock	Robert Ryan	6/29/2022
Burlington	196			Brothers Printer	Shannon's Office	6/29/2022
Burlington	197			Dell Dock	Shannon Weaver	6/29/2022
Burlington	198		HWC0FL3	Dell Laptop	Shannon Weaver	6/29/2022
Burlington	199		JWC0FL3	Dell Laptop	Colton Campbell	6/29/2022
Burlington	200			Dell Dock	Colton Campbell	6/29/2022
Davenport	201		53TTQG3	Dell Laptop	Hannah Penn	6/20/2022
Davenport			43TTQG3	Dell Laptop	Litsy Corrales	6/20/2022

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Davenport	203		35340	Fellowes Laminator	AD/DW area	6/20/2022
Davenport	204		63TTQG3	Dell Laptop	Tyler Weger	6/20/2022
Davenport	205		7BZNHJ3	Dell Dock	Kendra Schaapveld	6/20/2022
Davenport	206		C6QMHJ3	Dell Dock	Brent Schwoebel	6/20/2022
Davenport	207			Dell Dock	Andrea Weekley's Desk	6/20/2022
Davenport	208		C84340886	RICOH Printer PC600	Youth Space	6/20/2022
Davenport	209		U68377L1N743618	Brothers Printer HL-L2320D	Taylor's Office	6/20/2022
Davenport	210			Tempur-Pedic 6400	Kenzie Failyer	6/20/2022
Davenport	211		UD324980507	ViewSonic Monitor	DeShawn Banks	6/20/2022
Davenport	212			Tempur-Pedic 6400	Robert Hummel	6/20/2022
Davenport	213			Everell Desk Chair	Brent Schwoebel	6/20/2022
Davenport	214		3XC0FL3	Dell Laptop	Kenzie Failyer	6/20/2022
Davenport	215			Dell Dock	Kenzie Failyer	6/20/2022
Davenport	216		2XC0FL3	Dell Laptop	DaShawn Banks	6/20/2022
Davenport	217			Tempur-Pedic 6400	DaShawn Banks	6/20/2022
Davenport	218			Dell Dock	DaShawn Banks	6/20/2022
Davenport	219			HP Monitor	Kenzie Failyer	6/20/2022
Davenport	220			HP Monitor	Kenzie Failyer	6/20/2022
Davenport	221			HP Monitor	Kendra Schaapveld	6/20/2022
Davenport	222			HP Monitor	Kendra Schaapveld	6/20/2022
Davenport	223			Table	Jamie McLaughlin	6/20/2022
Burlington	227			VR Headset 4526	Shannon's Office	6/29/2022
Burlington	228			VR Headset 4527	Shannon's Office	6/29/2022
Burlington	229			VR Headset 4530	Shannon's Office	6/29/2022
Burlington	230			VR Headset 4531	Shannon's Office	6/29/2022
Burlington	231			VR Headset 4524	Shannon's Office	6/29/2022
Burlington	232			VR Headset 4525	Shannon's Office	6/29/2022
Burlington	233			VR Headset 4521	Shannon's Office	6/29/2022
Burlington	234			VR Headset 4520	Shannon's Office	6/29/2022
Burlington	235			VR Headset 4515	Shannon's Office	6/29/2022
Burlington	236			VR Headset 4514	Shannon's Office	6/29/2022
Burlington	241			Desk	Toby Estrada	6/29/2022
Burlington	242			Chair	Toby Estrada	6/29/2022
Burlington	243			Filing Cabinet	Toby Estrada	6/29/2022
Burlington	244			HP Monitor	Toby Estrada	6/29/2022
Burlington	245		3MDHVK3	Dell Dock	Tabytha Seigfried	6/29/2022
Burlington	246		GWC0FL3	Dell Laptop	Tabytha Seigfried	6/29/2022
Burlington	247			HP Monitor	Shannon Weaver	6/29/2022
Burlington	248			HP Monitor	Shannon Weaver	6/29/2022
Burlington				HP Monitor	Tabytha Seigfried	6/29/2022

LOCATION	MVDWB CODE	IWD TAG	Serial #	DESCRIPTION	REMARKS	PY21 Q4 Audit
Burlington	250			HP Monitor	Tabytha Seigfried	6/29/2022
Burlington	no tag	no tag	BRCM94312MCG	Dell Laptop	Storage	6/29/2022
Burlington	no tag	no tag	BRCM94311MCG	Dell Laptop	Storage	6/29/2022
Davenport	no tag	92864	n/a	SHREDDER MODEL 2604CC/I@W CCC	not working, storage	
Burlington	no tag	no tag	2CE3150HBD	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	2CE315135H	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB2180D8V	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB24816FR	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB24816FS	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB24816FT	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB24816FW	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CB423FTBF	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG3458ZB1	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG423FTBQ	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG423FTC3	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG423FTC7	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG423FTD8	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG5181BK7	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG5181BKC	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG5181BM1	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	5CG5181BPG	HP Laptop	Storage	6/29/2022
Burlington	no tag	no tag	CND452BJ8C	HP Laptop	Storage	6/29/2022
Des Moines	no tag		1XC0FL3	Dell Laptop	Des Moines	
Des Moines	no tag		GVRHVK3	Dell Dock	Des Moines	

**From:** [Longstreth, Taylor \[IWD\]](#)  
**To:** [Phyllis Wood](#)  
**Subject:** Fw: Board Tags  
**Date:** Wednesday, June 22, 2022 1:16:20 PM  
**Attachments:** [Outlook-g4tazh21.png](#)

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Hi Phyllis!

Hopefully my forwarded pictures come through okay for you. The pictures should show:

- Hannah's Chromebook (042)
- Jamie's Chromebook (044)
- Jamie's Dell Laptop (161)
- Kendra's Chromebook (048)
- Lisa's Chromebook (047)
- Lisa's Dell Laptop (187)

I also found out that the two Docks that we were missing tags (215 & 205) were actually tagged as brick part of our laptop charger, we took those tags and placed them where they need to be on those docks, so those are accounted for now as well!

Please let us know how we're doing, complete our Legacy In Action survey at <http://www.equusworks.com/survey/>

## Taylor Longstreth

Operations Supervisor, WIOA Title I Programs

[Iowa Workforce Development](#)

1801 East Kimberly Road, Suite A

Davenport, IA 52807

Desk: (563) 445 3200 ext: 43318

[taylor.longstreth@iwd.iowa.gov](mailto:taylor.longstreth@iwd.iowa.gov)

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---

**From:** Taylor Longstreth <taylongstreth@gmail.com>

**Sent:** Wednesday, June 22, 2022 12:53 PM

**To:** Longstreth, Taylor [IWD] <Taylor.Longstreth@iwd.iowa.gov>

**Subject:** Board Tags

**From:** [Weaver, Shannon \[IWD\]](#)  
**To:** [Phyllis Wood](#)  
**Subject:** Fw:  
**Date:** Wednesday, June 29, 2022 11:50:00 AM  
**Attachments:** [Outlook-z3nv35jx.png](#)

---

Hi Phyllis. Here are the photographs of all the tags on the stuff in Keokuk.

Thanks,

Shannon Weaver  
Operations Supervisor, WIOA Title I Programs  
550 S. Gear Ave. Suite 35  
West Burlington, Ia 52655  
(319) 753-1671 ext. 30450  
shannon.weaver@iwd.iowa.gov

***Please take a minute to fill out our survey. Thank you for being a great workforce partner!***

[www.equusworks.com/survey/](http://www.equusworks.com/survey/)



A proud partner of the AmericanJobCenter network

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**From:** 3195722997@mms.uscc.net <3195722997@mms.uscc.net>  
**Sent:** Wednesday, June 29, 2022 11:48 AM  
**To:** Weaver, Shannon [IWD] <Shannon.Weaver@iwd.iowa.gov>  
**Subject:**

Thank you for using Picture and Video Messaging by U.S. Cellular. See [www.uscellular.com](http://www.uscellular.com) for info.



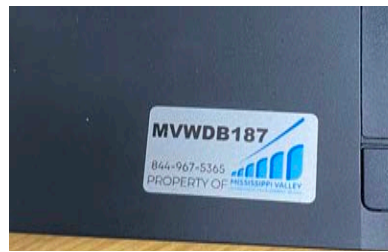
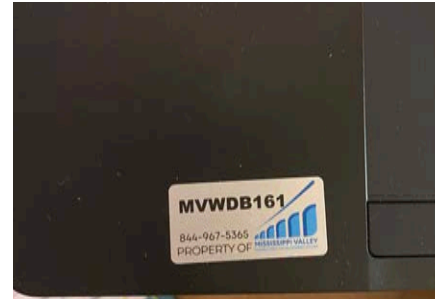
# Support Services Details



Latitude 5590

Print

Service Tag	Express Service Code	Ship Date	Location
2B2H0X2	5022846182	29 JUN 2019	United States



# Contract Modifications



## Current Contract Language

### Proposed Modification:

The highlighted text below states any property with a serial number costing over \$50 should be included on the inventory list. Can we look at raising this to \$500?

All furniture and equipment would still be labeled but would not be included in the inventory process or system.

### Current Contract Language

#### **SECTION 10. PROCUREMENT STANDARDS AND INVENTORY CONTROL**

The standards to be used for the procurement of supplies, equipment, and other materials and services with this contract's funds are to follow the LWDB/Fiscal Agent policies that follow the Office of Management and Budget Uniform Administrative Requirements, 2 CFR Chapter I and Chapter II, Parts 200, 215, 220, 225, and 230. These standards must be applied in accordance with procedures set forth in the "Revised Non-Discrimination and Equal Employment Opportunity/Affirmative Action Program Requirements Statement for Contracts or Agreements". Further, the CONTRACTOR shall avoid conflicts of interest, real or apparent, by observing the following requirements.

- A. Title to Property. All property and equipment purchased for the administration of this Agreement or transferred to CONTRACTOR belongs to the LWDB and shall continue to be the property of the LWDB when the Agreement terminates, and shall not be used for any purpose other than to provide the services covered under this agreement unless it has the express written consent of the LWDB. The purchase of any such property shall be included in Contractor's monthly report. Upon termination of this Contract or at the end of the Contract period the CONTRACTOR shall either return to the LWDB within thirty (30) days, all property furnished to the CONTRACTOR or property which was purchased with funds under WIOA or request in writing approval from the LWDB to dispose of said property.

The CONTRACTOR agrees to maintain careful accountability of all WIOA purchased non-expendable property (property with a life expectancy of one year or more and a unit cost of \$500.00 or more) and to maintain an inventory of all properties acquired with WIOA funds, to be inventoried annually. Acquisition of non-expendable property with a unit cost of \$1,500.00 or more must be approved by the LWDB, prior to the purchase. Additionally, equipment with an original acquisition cost of \$50.00 and up that also has a serial number should be kept on the inventory software. Examples of which equipment that may include are PC's, PC monitors, terminals, laptops, printers, servers, control units, hubs, modems, routers, external tape backup units, convenience bases, external CD ROM drives, external hard drives, scanners, etc. Any disposal of WIOA property must be according to applicable federal, state and local disposal procedures. Any revenues derived from the sale of property purchased with WIOA funds must be used in WIOA service delivery for the program(s) which funded the original purchase.

Purchase or lease of office equipment and other personal property directly under this Contract, funds must be approved by the LWDB.

When non-expendable property is purchased with a cost between \$500 and \$1500 the LWDB Executive Director must be notified of the purchase within 10 business days.

# PY22 Budgets

## **Draft Admin Budget Narrative**

*PY22 (July 1, 2022 – June 30, 2023)*

**Board Staff Salaries** - \$305,315.67 total amount of board staff salary, benefits and 3% Muscatine County administrative fee. \$4,232.96 will come from the National Dislocated Worker Grant (NDWG). \$90,324.81 (30%) of staff time will be spent on program related activities and will be split across the Adult/DW and Youth funding streams. The remaining \$210,757.90 will be spent on board admin activities and charged to this admin budget.

**Fiscal Agent** - The CEOs approved a rate of \$59,796.00 with Central Iowa Juvenile Detention Center to perform the Fiscal Agent functions for a 13-month contract. The 12-month cost budgeted in PY22 is \$55,196.31. SEIRPC's 45 day contract extension is budgeted at a maximum of \$13,000.

**Mileage and Travel** - Including flight, hotel, ground transportation, cost to cover meals and other out of town related expenses for quarterly GLETA and Iowa Association of Workforce Boards (IAWB) meetings, conferences including the Youth Symposium, NAWDP, USWA, NAJA, NAWB conferences and other related workforce related events. Travel within the MVWA for board staff and board members is also covered for board related activities. The current IRS Mileage Per Diem rate will be used and adjusted as necessary, currently at \$0.58.5.

**Telephone, Postage, Supplies** - Office supplies including binders, paper, pens, etc. Cost of a 1-800 board phone number that provides a professional messaging and options that direct to staff cell phones and centers. Cost of monthly cell for stipend for board staff (3 staff, \$60 a month X 12). Cost of postage for board related functions.

**Outreach and Public Relations** - Costs for radio ads, booths, Lunch and Learns, radio slots, print ads, social media campaigns etc. Two outreach efforts in each county will be conducted. Costs associated with the Disability Access Awareness Campaign and other outreach initiatives outlined in the MOU are covered under this line item.

**Equipment** - Purchase of computer, printers, monitors, other office equipment, and items with a serial number.

**Professional Services and Business Expenses** - Fees related to filing annual IRS forms and other financial documents, or professional services needed. \$1,000 cost of PY21 SEIRPC audit of WIOA funds. Fees associated with the review of contracts, agreements, and other legal documents. General Liability and Directors and Officers insurance to cover board members and CEOs.

**Information Technology** - Includes but is not limited to costs of website maintenance and email domain, Squarespace, Zoom subscriptions, DocoSign, Adobe, Microsoft 365 Business, DoodlePoll, Dropbox, IT support, mobile internet and board training platform.

**Dues and Subscriptions** - Dues and Subscriptions– This includes memberships to all of the 13 Chambers of Commerce throughout the 8-county area, National Association of Workforce Boards (NAWB), National Association of Workforce Development Professionals (NAWDP), the United States Workforce Alliance and other workforce related organizations. Subscription for LMI database is also included.

**Meeting Expenses** - Fees for regularly scheduled workforce meetings including the cost of facilities, presenters, printing, supplies etc. Regular meetings can include but are not limited to CEOs, board, committees, core partner meetings or in-service days.

**Conferences and Trainings** - Professional development opportunities for board staff and board members including but not limited to registration fees for the Youth Symposium, NAWDP, NAJA, USWA, IAWB, and NAWB. Fees associated with professional development webinars and trainings for board staff. Fees to coordinate a minimum of two in-person board trainings each year and contributions to the statewide board training including facilities, presenters, supplies, etc.

**Printing** - Cost of printing materials for meetings and record keeping purposes, along with brochures and other outreach material. Printing of board manuals and IowaWORKS resource guides are also covered. Monthly HP instant ink included for board staff printers.

**Special Initiatives** - Special Initiatives – Funding to support sector initiatives, special projects in partnership with Chambers of Commerce, Economic Development entities, and other community partners.

**Unobligated Funds** – Other funds that have not been budgeted at this time.

**Mississippi Valley Workforce Development Board  
Draft PY22 Admin Budget  
July 1, 2022 - June 30, 2023**

**Approved mm/dd/yyyy**

**Estimated Income Stream**

FY22 Carryover	200,000.00
PY22/FY23	326,115.00
<b>Total Admin</b>	<u>526,115.00</u>

<b>Expense</b>	<b>PY22 Budget</b>
Board Salaries	210,757.90
Fiscal Agent	68,196.31
Mileage and Travel	30,000.00
Telephone, Postage, Supplies	5,000.00
Outreach & Public Relations	15,000.00
Equipment	5,000.00
Professional Services and Business Expenses	8,500.00
Information Technology	7,000.00
Dues and Subscriptions	10,000.00
Meeting Expenses	4,000.00
Conferences and Trainings	15,000.00
Printing	4,000.00
Special Initiatives	15,000.00
Unobligated Funds	128,660.79
<b>Total</b>	<u>526,115.00</u>

<b>Draft PY22 Budget</b>					
<b>Youth</b>	<b>Amount</b>	<b>Adult</b>	<b>Amount</b>	<b>DW</b>	<b>Amount</b>
Estimated PY21 Carryover	670,000.00	Estimated FY22 Carryover	200,000.00	Estimated FY22 Carryover	150,000.00
PY22	1,270,134.00	PY22	181,674.00	PY22	159,003.00
<b>Total</b>	1,940,134.00	FY23	811,874.00	FY23	512,366.00
<b>80% Obligation Required</b>	1,016,107.20	<b>Total</b>	1,193,548.00	<b>Total</b>	821,369.00
<b>PY21 Carryover WEP 20%</b>	242,000.00	<b>80% Obligation Required</b>	<b>994,838.40</b>	<b>80% Obligation Required</b>	<b>687,095.20</b>
<b>PY22 20% WEP</b>	254,026.80				
<b>Total 20% WEP</b>	496,026.80				
<b>Expenses</b>		<b>Expenses</b>		<b>Expenses</b>	
PY21 OSO Contract	6,666.67	PY21 OSO Contract	6,666.67	PY21 OSO Contract	6,666.67
PY22 OSO Contract (9 mo)	25,000.00	PY22 OSO Contract (9 mo)	25,000.00	PY22 OSO Contract (9 mo)	25,000.00
Subleases	52,702.09	Subleases	51,152.00	Subleases	51,152.00
Board Staff	30,108.27	Board Staff	30,108.27	Board Staff	30,108.27
RFP for Outreach Campaign	16,666.67	RFP for Outreach Campaign	16,666.67	RFP for Outreach Campaign	16,666.67
RFP for Sector Strategy Study	10,000.00	RFP for Sector Strategy Study	10,000.00	RFP for Sector Strategy Study	10,000.00
Equus Program Contract	1,790,361.42	Incumbent Worker Training	25,000.00	Incumbent Worker Training	25,000.00
Unobligated Funds	8,628.89	Unobligated Funds	8,628.89	Unobligated Funds	8,628.89
<b>Total Expenses</b>	1,940,134.00	Equus Program Contract	1,020,325.51	Equus Program Contract	648,146.51
		<b>Total Expenses</b>	1,193,548.00	<b>Total Expenses</b>	821,369.00

# Monitoring Reports





211 N. Gear Avenue, Suite 100  
West Burlington, Iowa 52655

Tel: 319.753.5107  
Fax: 319.754.4763  
Website: [www.seirpc.com](http://www.seirpc.com)

June 3, 2022

Ms. Kendra Schaapveld, MPA  
Project Director  
Title I Adult/Dislocated Worker, Youth Programs  
IowaWorks  
1801 East Kimberly Road, Suite A  
Davenport, IA 52807

RE: Monitoring Service Provider January 2022 Adult, Dislocated Worker, Youth In School,  
Youth Out of School Invoices for Insurance Line Item

Dear Ms. Schaapveld:

Thank you for your response along with the additional documentation to the Recommended Action on May 25, 2022, on the Insurance Line Item Monitoring for the January 2022 Adult, Dislocated Worker, Youth in School, and Youth out of School Invoices.

We have accepted your response and documentation, which is enclosed. We have approved your response along with the documentation, and no further action is needed. This completes the Insurance Line Item Monitoring for the January 2022 Adult, Dislocated Worker, Youth in School and Youth out of School invoices.

Thank you for all your cooperation on this matter. If you have any questions, please do not hesitate to contact me by e-mail at [scoffey@seirpc.com](mailto:scoffey@seirpc.com), or by phone at (319) 753-4302.

Sincerely,

Susan Coffey  
Administrative Director

Enclosure

Cc: Miranda Swafford

## Susan Coffey

---

**From:** Kendra Schaapveld <Kendra.Schaapveld@EquusWorks.com>  
**Sent:** Wednesday, May 25, 2022 2:47 PM  
**To:** Susan Coffey; Lori Gilpin  
**Cc:** Cheryl Tipsword; director@mississippivalleyworkforce.org  
**Subject:** Follow up fiscal documents  
**Attachments:** FW\_Iowa\_Fiscal\_Monitoring\_Follow\_Up.zip

Please see the attached zip file and consider these documents the response to the fiscal monitoring. Please let us know if you require any additional information.

Thank you!

**Kendra M. Schaapveld, MPA**

Project Director, Title I Adult/Dislocated Worker, Youth Programs  
*IowaWORKS - a Proud Partner of the American Job Center Network*  
1801 East Kimberly Road  
Suite A  
Davenport, IA 52807  
Desk: 563.445.3200 Ext. 43304  
Fax: 563.445.3240  
[kendra.schaapveld@iwd.iowa.gov](mailto:kendra.schaapveld@iwd.iowa.gov)  
[kendra.schaapveld@equusworks.com](mailto:kendra.schaapveld@equusworks.com)

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



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**Liability and D&O Cost Allocation**

Liability insurance and D&O insurance costs are allocated evenly based on revenue.

**II. General/Professional Liability**

	7/1/21 - 6/30/22	% Increase	Full Year 2022
ACE/Chubb Primary Insurance Premiums	\$ 81,259	0%	\$ 81,259
Ascott Excess Insurance Premiums	\$ 1,218,060	25%	\$ 1,522,575
XL Bermuda Excess Insurance Premiums(4)	\$ 634,313	25%	\$ 792,891
AWAC Excess Insurance Premiums (4)	\$ 382,500	25%	\$ 478,125
Convex Excess Insurance Premium (4)	\$ 400,067	25%	\$ 500,084
Beazley Excess Insurance Premiums	\$ 424,035	25%	\$ 530,044
MedPro Excess Insurance Premiums (4)	\$ 182,724	25%	\$ 228,405
XL Arbor Misc Professional (E&O)	\$ 188,108	0%	\$ 188,108
Broker & Other Administrative Fees(2)	\$ 27,500	0%	\$ 27,500
Retained Losses (7)	\$ 7,500,000	0%	\$ 7,500,000
Claims Handling - Sedgwick (8)	\$ 157,867	0%	\$ 157,867
<b>Total GL/PL</b>	<b>\$ 11,196,432</b>	<b>7%</b>	<b>\$ 12,006,857</b>

**VII. Stand Alone Coverages (5)**

Westchester - Primary D&O & FID (12/1 eff. Date)	\$ -	0%	\$ -
Nat'l Union - 1st Excess D&O (12/1 eff. Date)	\$ -	0%	\$ -
RLI - 2nd Excess D&O (12/1 eff. Date)	\$ -	0%	\$ -
Ironshore - 3rd Excess D&O (12/1 eff. Date)	\$ -	0%	\$ -
Nat'l Union - 1st Excess FID Liab. (12/1 eff. Date)	\$ -	0%	\$ -
Marsh D&O (12/1 eff. Date)	\$ -	0%	\$ -
Employment Practices Liability (Place holder)	\$ -		\$ -
AIG HIPAA/Cyber Liability	\$ 111,841	20%	\$ 134,209
<b>Total Stand Alone</b>	<b>\$ 111,841</b>	<b>20%</b>	<b>\$ 134,209</b>

<b>Total Liability and D&amp;O</b>	<b>\$11,308,273</b>	<b>7%</b>	<b>\$12,141,066</b>
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**Revenue for 2021 budget purposes (1)**

Behavioral	\$ 1,120,220,775	\$ 1,120,220,775
Home Health & Neuro Therapies	\$ 659,801,358	\$ 659,801,358
WorkForce Services	\$ 344,997,266	\$ 344,997,266
Resource Center	\$ -	\$ -
<b>Total</b>	<b>\$ 2,125,019,399</b>	<b>\$ 2,125,019,399</b>

<b>Cost per \$1,000/revenue</b>	<b>\$ 5.32</b>	<b>0%</b>	<b>\$ 5.71</b>
Memo: 2020 budget	\$ 5.58	\$ 5.58	
Change from PY	\$ (0.26)	\$ 0.13	
% change from PY	-5%	2%	

**Cost per Division**

Behavioral	\$ 5,961,246	\$ -	\$ 6,400,259
Home Health & Neuro Therapies	\$ 3,511,128	\$ -	\$ 3,769,703
Workforce/Education&Training	\$ 1,835,900	\$ -	\$ 1,971,104
<b>Total</b>	<b>\$ 11,308,273</b>	<b>\$ -</b>	<b>\$ 12,141,066</b>

**NOTES:**

- (1) Used 1/1/21-9/30/21 Revenue annualized through 12/31/20 (K Gaddie) for 2022 Budgeted numbers.
- (2) Includes estimated Aon broker fees (half of total annual amount) \$250,000 (11% allocated to GL)
- (4) Annual Excess premiums allocated 75% to GL and 25% to Auto (excluding Sexual Abuse & Molestation - Benzley and the Buffer Layer - Ascott)
- (5) BHS was placed under the KKR Plan upon closing. Budget located in Department 032
- (7) Estimated annual Loss pick at \$7.5M per 8/31/20 accruals.
- (8) YTD 2021 annualized for remainder of year (GL is about 5% of total Sedgwick fee)

	2016	2017	2018	2019	2020
NUMERATOR (losses + prem)	7.7	8.6	9.4	10.31	10.41
DENOMINATOR (revenues)	1805	1760	1790	1886.7	1905.37
	0.004266	0.004886	0.005251	0.005465	0.005464
	4.27	4.89	5.25	5.46	5.46

0 \* \*

0 \* \*

20,414.00 +  
 12,169.00 +  
 12,169.00 +  
 12,169.00 +  
 12,169.00 +  
 12,169.00 +  
 81,259.00 \*

**BrightSpring Health Services**

Invoice No. 1800000277741

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Jul-31-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Jul-01-2021	Renewal - General Liability Coverage  Premium Assessment	20,284.00  130.00
<b>Comments</b> Installment 1 of 6 Policy Numbers: XSLG7248079A, HDOG72480831 and XSLG72480879					
				<b>TOTAL INVOICE AMOUNT DUE</b>	<b>20,414.00</b>

**TO AVOID POTENTIAL DISRUPTION IN YOUR COVERAGE, PAYMENT IS DUE UPON RECEIPT.  
Please Make Payable to Aon Risk Services**

*Please see last page for statement regarding Aon compensation.*

Page 1 of 3

*Please detach here. Top portion is for your records, bottom portion to be returned with your payment.*

Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000277741	Jul-31-2021	US DOLLAR	20,414.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376



**BrightSpring Health Services**

Invoice No. 1800000277742

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Jul-31-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Aug-01-2021	Renewal - General Liability Coverage  Premium	12,169.00
<b>Comments</b> Installment 2 of 6					
<b>TOTAL INVOICE AMOUNT DUE</b>					<b>12,169.00</b>

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Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000277742	Jul-31-2021	US DOLLAR	12,169.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376

**BrightSpring Health Services**

Invoice No. 1800000277831

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Aug-02-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Sep-01-2021	Renewal - General Liability Coverage  Premium	12,169.00
<b>Comments</b> Installment 3 of 6					
				<b>TOTAL INVOICE AMOUNT DUE</b>	<b>12,169.00</b>

**TO AVOID POTENTIAL DISRUPTION IN YOUR COVERAGE, PAYMENT IS DUE UPON RECEIPT.  
Please Make Payable to Aon Risk Services**

*Please see last page for statement regarding Aon compensation.*

Page 1 of 3

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Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000277831	Aug-02-2021	US DOLLAR	12,169.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376

## BrightSpring Health Services

Invoice No. 1800000278633

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Aug-16-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Oct-01-2021	Renewal - General Liability Coverage  Premium	12,169.00
<b>Comments</b> Installment 4 of 6					
				<b>TOTAL INVOICE AMOUNT DUE</b>	<b>12,169.00</b>

**TO AVOID POTENTIAL DISRUPTION IN YOUR COVERAGE, PAYMENT IS DUE UPON RECEIPT.  
Please Make Payable to Aon Risk Services**

*Please see last page for statement regarding Aon compensation.*

Page 1 of 3

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Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000278633	Aug-16-2021	US DOLLAR	12,169.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376



## BrightSpring Health Services

Invoice No. 1800000279763

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Sep-15-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Nov-01-2021	Renewal - General Liability Coverage  Premium	12,169.00
<b>Comments</b> Installment 5 of 6					
<b>TOTAL INVOICE AMOUNT DUE</b>					<b>12,169.00</b>

**TO AVOID POTENTIAL DISRUPTION IN YOUR COVERAGE, PAYMENT IS DUE UPON RECEIPT.  
Please Make Payable to Aon Risk Services**

*Please see last page for statement regarding Aon compensation.*

Page 1 of 3

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Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000279763	Sep-15-2021	US DOLLAR	12,169.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376



**BrightSpring Health Services**

Invoice No. 1800000280889

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

Aon Risk Services Central, Inc.  
Philadelphia PA Office  
One Liberty Place  
1650 Market Street  
Suite 1000  
Philadelphia PA 19103  
(215) 255-2000 FAX (215) 255-1893

Client Account No.	Invoice Date	Currency	Account Executive
570000032784	Oct-18-2021	US DOLLAR	Vincent Baldino

Insurance Co.	Policy No. / Named Insured	Policy Term	Trans. Eff. Date	Description	Amount
ACE American Insurance Company	XSLG7248079A  BrightSpring Health Services	Jul-01-2021 - Jul-01-2022	Dec-01-2021	Renewal - General Liability Coverage  Premium	12,169.00
<b>Comments</b> Installment 6 of 6					
<b>TOTAL INVOICE AMOUNT DUE</b>					<b>12,169.00</b>

**TO AVOID POTENTIAL DISRUPTION IN YOUR COVERAGE, PAYMENT IS DUE UPON RECEIPT.  
Please Make Payable to Aon Risk Services**

*Please see last page for statement regarding Aon compensation.*

Page 1 of 3

This is a **Reissued** Invoice

*Please detach here. Top portion is for your records, bottom portion to be returned with your payment.*

Client Account No.	Invoice No.	Invoice Date	Currency	Amount Due
570000032784	1800000280889	Oct-18-2021	US DOLLAR	12,169.00

BrightSpring Health Services  
805 N. Whittington Parkway  
Louisville KY 40222 USA

**Remit to:**

Aon Risk Services Central, Inc.  
Aon Risk Services Companies, Inc.  
P.O. Box 7247 - 7376  
Philadelphia PA 19170-7376



211 N. Gear Avenue, Suite 100  
West Burlington, Iowa 52655

Tel: 319.753.5107  
Fax: 319.754.4763  
Website: [www.seirpc.com](http://www.seirpc.com)

May 20, 2022

Ms. Kendra Schaapveld, MPA  
Project Director  
Title I Adult/Dislocated Worker, Youth Programs  
IowaWorks  
1801 East Kimberly Road, Suite A  
Davenport, IA 52807

RE: Monitoring Service Provider February 2022 Dislocated Worker Invoice Support Services  
Line Item

Dear Ms. Schaapveld:

Southeast Iowa Regional Planning Commission (SEIRPC) staff conducted a Service Provider Monitoring on the February 2022 Dislocated Workers Invoice Support Services Line Item as required under the Workforce Innovation and Opportunity Act.

Please find enclosed our Report from this review. There were no findings, so no response is needed.

Thank you and your staff for all your assistance with the monitoring. If you have any questions, please do not hesitate to contact me by e-mail at [scoffey@seirpc.com](mailto:scoffey@seirpc.com), or by phone at (319) 753-4302.

Sincerely,

*Susan Coffey*

Susan Coffey  
Administrative Director

Enclosure

## Service Provider Monitoring

Program Year 2021-2022

Date: May 12, 2022

**Type of Monitoring:** Monitoring Equus' Dislocated Worker Support Services Line Item

### Activities Monitored

#### 1. February 2022 Dislocated Worker, Support Services Line Item

February 22, 2022, we requested Support Services Information and Calculations for the Dislocated Worker Invoice Support Services Line Item listed on Equus' February 2022 invoice.

**Systems Monitored:** Support Service Vouchers and proof of payment for that service.

### Identification of Best Practices

Received a spreadsheet from Cheryl and Kendra that shows the Participant's Name and amount they received to help them to attend school along with Participant's Support Service Voucher showing amount, approval and proof of payment. The spreadsheet shows the type of support services each participant received that equals the amount listed on the Dislocated February Invoice under Support Services.

### Monitoring Findings

None, Equus provided everything I requested and everything equals out to the Equus February Invoice.

### Recommended Corrective Action

None

### Equus Corrective Action Plan

None

### Areas of Concerns

None

### Final Recommendations

None



## On the Job Training (OJT) Monitoring Report

SUMMARY	
<b>Contract:</b>	<b>Monitors</b>
Equus OJT Program	Ms. Liz Rodriguez, Associate Director, MVWDB
<b>Desk Review</b>	<b>Date and Location of On-Site Monitoring</b>
6/13/2022 – 6/23/2022	N/A
<b>Files Reviewed</b>	
State ID: 803937	
<b>Number of Findings</b>	<b>Corrective Action Plan Due Date</b>
0	N/A

### MONITORING REPORT DEFINITIONS

**Promising Practices** - Promising practices are practices or outcomes identified during the review that are observed as being effective, innovative or best practice. These are practices that go above and beyond standard service delivery expectations and/or practices.

**Findings** - Findings are identified as issues or practices non-compliant with federal, state and/or local statutes, regulations, terms and conditions of an award or contract, policies and directives. Each finding has a corresponding required corrective action identifying what action must be taken, or documentation provided, in order for the finding to be resolved. Please use the “Contractor Response” box within the monitoring report to detail the actions taken by the service provider to resolve the Finding. MVWDB will utilize the “MVWDB Response” box within the report to acknowledge when a finding is resolved or if additional action is required to resolve the finding.

**Areas of Concern** - Areas of concern are issues, policies, or practices observed during the review that may negatively impact the ability to effectively manage the grant or provide services to participants. They may also include red flags or risk areas that, if not addressed and corrected, could lead to an area of non-compliance in future monitoring reviews. Each area of concern will have a corresponding recommendation for correcting the issue or practice. Responses are not required for an area of concern but are welcome.

## PROMISING PRACTICES

The promising practices found during monitoring activities conducted in June 2022 include:

- The assessment of participant's current skills in relationship to the skills and abilities needed to perform the occupation for which the OJT is performed is very thorough and sets appropriate expectations for employer and participant and supports the successful placement and completion of the OJT plan.
- Equus' staff diligence in ensuring participant and employer is getting paid correctly and if a change is made, staff are diligent and expedient in their work to modify contract(s) and adjust payment(s) – in this contract the employer made a change to weekend wage differential and Equus was quick to accommodate this need and document modifications appropriately.

## NO FINDINGS

## AREAS OF CONCERN

**Area of Concern 1. OJT agreement with employer needs revision.** During the OJT monitoring process, it was discovered that the OJT agreement currently in use does not use language consistent with the requirements in the MVWDB Policy. Specifically, the MVWDB is requiring certain assurances from an employer in the policy that are not directly addressed in the agreement. It was also uncovered that the current document establishes contractual obligations between the board and the employer which is not permitted according to board bylaws.

**Area of Concern 2. Areas of process overlap regarding progress visits.** During the OJT monitoring process, it was discovered that overlaps between the monitor and the service provider exists as it relates to verifying participant progress, participation and the overall satisfaction of the employer and participant with the OJT experience.

**Area of Concern 3. MVWDB OJT policy generates obstacles.** During the OJT monitoring process, it was discovered that the board OJT policy created requirements not related to federal, state or local laws or risk prevention efforts that created extra steps for board staff and service providers that did not add value to the participant, employer nor the program itself.

**Area of Concern 4. More timely case notes needed for progress reviews.** During the OJT monitoring process, it was discovered that progress reviews with employer(s) were not documented in the participants case notes in a way that could be easily found by the monitor.

## RECOMMENDATION

**Recommendation for Area of Concern 1.** OJT agreement will be reviewed by board staff. Areas that are not in compliance with MVWDB policy will be identified and provided to service provider. Service provider will use input from board staff to create new/compliant agreement for OJT program use.



**Recommendation for Area of Concern 2.** OJT policy modifications have already been made and approved to address areas of overlap so progress visits/ progress checks are being conducted by MVWDB and service providers in a more coordinated and deliberate way and at a frequency that has less of a likelihood to overwhelm/overburden participant and employer.

**Recommendation for Area of Concern 3.** OJT policy modifications have already been made and approved to eliminate unnecessary obstacles to provision of services.

**Recommendation for Area of Concern 4.** Service providers should document progress reviews in the case management system within 2 - 3 days of progress review using case notes and attaching the email or providing a brief synopsis of conversation if progress review was conducted over the phone.

### CONTRACTOR RESPONSE OPTIONAL

Click or tap here to enter text.

## OVERALL SYSTEMWIDE OPPORTUNITIES AND RECOMMENDATIONS

During the monitoring interviews systemwide opportunities were found. The following include a general description of the opportunities and recommendations to address them.

**Opportunity:** Currently, there is no system used by the local workforce area to share information about those organizations who may not be the best fit for OJT placement. The OJT “excluded employers” policy modification below establishes a more agile method of evaluating whether an employer is a good fit for OJT placement, but the opportunity still remains for a method by-which service providers across the local workforce area flag certain employers as non-desirable placement candidates and move employers out of a non-desirable placement category.

**Recommendation:** The local workforce area currently does not have enough OJT placements to create a high risk of placing an OJT participant into an organization known for non-compliance with OJT policies/requirements. The local workforce area also currently employs service providers who have a lengthy historical knowledge of the local employers and any instances of non-compliance, so they know from experience where risky OJT placements could occur. I recommend MVWDB service providers in both Iowa *WORKS* centers to consider ways to share information about any OJT employers who recurrently demonstrate non-compliance with OJT policies/requirements if, and when this occurs, especially as this program increases numbers of participants and participating employers.

### **The OJT policy modification**

5. Excluded employers
  - a. Prior to re-contracting with an OJT employer, the past performance of that employer must be reviewed.
  - b. An OJT contract must not be entered into with an employer who has previously exhibited a pattern of failing to retain at least 75% of OJT participants with continued long-term employment as regular employees with wages, benefits, and working conditions at the same level and to the same extent as similarly situated employees.
    - i. OJT participants who voluntarily quit, are terminated for cause, or are released due to unforeseeable changes in business conditions need not result in termination of employer eligibility for future OJT contracts.
  - c. An employer that has been excluded from OJT contracting because of the requirement(s) described above may again be considered for an OJT placement one year after that sanction was imposed.
  - d. In this re-contracting situation, if the employer fails to retain the participant after the OJT ends, and there is no apparent cause for dismissing the employee, the employer must not receive any future OJT contracts.
  - e. MVWA may reconsider the employer for participation in the program if they can demonstrate they have taken appropriate corrective action to comply with WIOA.

<b>State ID:</b>	803937
<b>Participant Name</b>	TELLEZ, MARIA
<b>Employers</b>	Unity Point Health Trinity
<b>Application Summary</b>	<b>Program:</b> Title I - Workforce
	<b>Application Date:</b> 3/1/2022
	<b>Earliest Eligibility Date:</b> 03/01/2022
<b>Project Begin Date</b>	4/4/22
<b>Projected End Date</b>	9/30/22
<b>Occupational Training Code</b>	31909700 - Phlebotomists
<b>Staff - Service Providers</b>	Tyler Weger Jaimee McLaughlin

#	OJT Monitoring Questions	Y/N	Notes
1	Is the organization a public, private-non-profit or private-for-profit business?	Y	
2	Are the following artifacts present in the case management system:		
3	Business License (optional - not required),	Y	
4	W-9,	Y	
5	Proof of Worker Liability and	Y	
6	Worker's Compensation Insurance	Y	
7	If not, are there other documents present that verify the organization's business, non-profit status?	N/A	
<b>OJT Employed Workers</b>			
8	Was the participant employed when he/she enrolled in the OJT program? (If N skip to next section)	N	WIOA Application
9	is not earning a self-sufficiency wage as defined in the local plan;	N/A	
10	the OJT relates to the introduction of new technologies, introduction to new production or service procedures, upgrading to new jobs that require additional skills, workplace literacy or other appropriate purposes identified in the local plan.	N/A	



<b>OJT Employer Eligibility</b>			
11	Is the OJT written with a temporary staffing agency? (If Yes, is OJT with the staffing agency? If not, this is a finding)	N	
12	Was "reverse referral" made? If N - skip next question	N	
13	a. Was the individual currently participating in the OJT already an employee of the organization with which they are currently participating in the OJT?  (if Y, this is a finding)	N/A	
14	Has an objective assessment and an IEP or ISS been completed which support the development of an OJT with the referring employer?	Y	
<b>Ineligible Occupations</b>			
15	Does the OJT occupation fall into any of the following categories?		
16	1) one in which an employer would typically be able to train a new employee in the first few days or weeks on the job;	N	
17	2) jobs in which the principal source of income is tips, commissions or piecework;	N	
18	3) jobs for commission salespersons, casino or other gambling establishment, aquarium, zoo, golf course, swimming pool, seasonal workers;	N	
19	4) those jobs that are intermittent or seasonal in nature;	N	
20	5) those jobs that require employees to sign a non-compete agreement;	N	
21	6) jobs used to assist, promote, or deter union organization;	N	
22	7) jobs that are entry level retail or fast food.	N	

**OJT Payment and Training Length**

23	Has the contract been written for an amount over 10,000?	N	
24	Is the employer being reimbursed over 50% of the participant's wage rate? If Yes - is the employer being reimbursed up to 75%? Or OVER 75%? If over 75% - that is a finding.	N	
25	If up to 75% are the following conditions met? (If No, Skip to #12)	N/A	
26	1) taking into consideration whether they are individuals with barriers to employment, length of unemployment, and current skill level.	N/A	
27	2) Small businesses with less than 200 employees.	N/A	
28	3) Preference will be given to skilled trades and advanced manufacturing in the Local Area.	N/A	
29	4) are other circumstances considered if the above items do not apply.	N/A	
30	Are tips or commissions included as wages paid to participant? If Yes, this is a finding.	N/A	
31	Are payments for overtime hours and holidays in compliance with local policies - payment received only if training was provided on the holiday. If No, this is a finding.	N/A	

OJT Contracts			
32	Was the contract completed and signed before the OJT participant started working?	Y	Timecard shows start date of 4/06/22 - contract signed on 4/11/22
33	Has the WIOA service provider or other designated staff, and the employer signed the OJT contract for the OJT participant?	Y	
34	Is the OJT contract limited to the period of time required for the participant to become proficient in the occupation for which the training is being provided.	Y	
35	Does the OJT contract <b>exceed six (6) months or 1040 hours?</b>  Is the OJT contract written for a participant to be trained in <b>less than 160 hours?</b>	N	
36	Has the appropriate contract length been determined by considering the 1) skill requirements of the occupation, 2) the academic and occupational skill level of the participant, and 3) the participant's prior work experience.	Y	Training Plan
37	Was the <b>Training Length Determination Form</b> used to calculate the maximum number of hours allowed for the OJT contract?	Y	
38	Are the actual hours of the contract determined by the Training Outline/Plan?  Is the Training Outline/Plan developed jointly by the OJT supervisor and the WIOA service provider case manager.	Y	
39	Has the rationale for the OJT training, including duration, been entered in the participant's Individual Employment Plan (IEP)?	Y	
40	Has the number of training hours for a participant increased/decreased? If no - skip to next section.  If Yes - Has this been approved by the board/executive committee?	N	

**OJT Contract Required Provisions**

41	Are wages paid to OJT participants at least the prevailing wage? If No - this is a finding.	Y	
42	Does the employer operate under a collective bargaining agreement? If No - skip to next question. If Yes, are the wages and benefits specified in the union agreement? Is the job opening cleared with the appropriate union?	N	
43	<b>Are assurances made to confirm</b> employer complies with requirements of the Civil Rights Act with respect to equal opportunity in employment for the OJT position as well as comply with all federal, state, and local laws.	Y	OJT Contract 14, 23, 24
44	<b>Are assurances made to confirm</b> OJT participants hired under this program will be subject to the same personnel policies, rules and regulations, and afforded the same benefits as the other participants of the company.	Y	in Pre-award 5 and 6, 7
46	Are Conditions of employment and training in full accordance with all applicable federal, state, and local laws (including but not limited to child labor, health and safety laws), and appropriate and reasonable in regard to type of work undertaken and the proficiency of the participant?	Y	OJT Contract 14, 23, 24

47	Does Employer certify that the OJT participant will not displace any regular employee and that no person was displaced as a result of relocation of the current business in the 120 days prior to signing the Pre-Award Review form?	Y	in Pre-award #4 and 11
48	Does the OJT involve religious or political activity? If Yes, this is a finding.	N	OJT Contract #20
49	Is the OJT conducted at the employer's place of business or another site, and NOT subcontracted?	Y	
50	Has the employer confirmed that the OJT participant will not be working for immediate family members?	Y	Pre-award #13
51	Does the OJT employer certify that neither the employing company nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or excluded from participation by any federal department or agency?	Y	OJT Contract #16
52	Is the OJT Training Outline/Plan written for skills that the OJT participant does not already possess. Has care been given to check the OJT participant's work history, and to document that the new skills to be learned are different, more difficult, and/or unique to the new job, and are therefore necessary to perform the new job tasks?	Y	Job Tasks Comparison

<b>Progress Review</b>			
53	Are monthly progress reviews being executed by Business Service Consultant and/or Navigator in a way that reflects the employers desired mode of communication ( phone, email, or web conferencing for example)	Y	
54	Is the first review conducted in-person at the job site? (Documents)	Y	4/20/22
55	Is there a case note or uploaded document that reocords service provider reviewed the Training Progress form and that the Training Progress form is demonstrating progress towards completing Training Outline/Plan?	Y	
<b>Contract File</b>			
56	Are the following OJT documents in the trainees contract file?		
57	Pre-Award Review form	Y	
58	Original OJT Contract and any modified contracts.	Y	
59	Proof of Workers Compensation Insurance coverage	Y	
60	Training Length Determination Form	Y	
61	Invoices and supporting documentation	Y	
62	Training Progress form (both interim and final)	Y	4/20/22
63	Job description	Y	
64	Justification of OJT participant's failure to satisfactorily complete (if applicable)	N/A	

**Monitoring Requirements**

65	Has OJT contract has been monitored by Board Staff at least once during the contract period to verify that:		
66	the participant is receiving the training contracted for in the agreement, and	Y	
69	the participant's attendance records demonstrate that the participant is attending and succeeding in the training and	Y	
70	review employer records to assure that the participant is receiving proper wages and	Y	
71	that the employer is withholding taxes and paying workers compensation.	Y	

# ADA Assessments





## Mississippi Valley Workforce Development Board

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**TO:** Mississippi Valley Workforce Development Board  
**FROM:** Cindy Whalen, Rehabilitation Supervisor  
**DATE REPORT SUBMITTED:** 6/16/2022  
**SUBJECT:** Burlington IowaWorks Location Accessibility Assessment Summary

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**DATE OF ASSESSMENT:** 05/18/2022

**INDIVIDUAL(S) CONDUCTING ASSESSMENT:** Cindy Whalen, Rehabilitation Supervisor, Aleena Garr, Rehabilitation Counselor, Ashley Banes, Rehabilitation Counselor, Brandi Mullen, Rehabilitation Assistant, Eva Castillo, Hope Haven Employment Services Coordinator

### **PURPOSE**

This report is to provide Mississippi Valley Workforce Development Board (MVWB) with an overview of the process used to assess accessibility for the Burlington IowaWORKS Center as well as the results of the assessment including findings and solutions/corrective actions taken to address those findings. The completion and submission of this report to the MVWB allows for appropriate oversight over center operations and compliance with Americans with Disabilities Act (ADA) to provide equal access to services and programs offered.

### **PROCESS**

Our team conducted the assessment using the ADA Checklist for existing Facilities based on the 2010 ADA Standards for Accessible Design. Please note the mall construction took place prior to 03/15/2012 and would comply with the 1991 standards are not required to be modified to specifications of the 2010 Standards. The team assessed Approach & Entrance to mall/center (including parking lot); Center Interior-Access to Services; Toilet Rooms (Public Mall Food Court); & Additional Access to include alarm systems and drinking fountains in order to complete the tool and determine where there exist any significant accessibility barriers.

### **SIGNIFICANT ACCESSIBILITY BARRIERS FOUND**

**Finding 1:** Accessible spaces identified with a sign that includes the International Symbol of Accessibility bottom of the sign measures 58 inches above the ground-Standard is 60 inches.

- a. **Solution/Corrective Action:** Review recommendation with Landlord and report back to board on results.

**Finding 2:** Center Fire Alarm- there is not a clear floor space at least 30 inches wide by at least 48 inches long for a forward or parallel approach. Display boards for center materials blocking the pathway to the fire alarm.

- b. **Solution/Corrective Action:** Discuss with center manager moving displays from in front of the fire alarm.

**Finding 3:** Does at least one telephone have a TTY?

- c. **Solution/Corrective Action:** Review recommendation with DAC committee to determine steps to obtaining a TTY phone for the center

**Finding 4: Public Phone-** The volume control is not identified by a pictogram of a telephone handset with radiating sound waves

- d. **Solution/Corrective Action:** Review with IowaWorks Center manager-get a sticker to with the pictogram to add to the phone.

**Finding 5: Public Restroom-Food Court Women's The handicapped accessible stall is out of order.**

- e. **Solution/Corrective Action:** Center customers will use the staff designated restrooms that were constructed in compliance with ADA. Center staff were notified of the restroom closure. Discussion and follow up took place with the mall maintenance worker who stated they are waiting for a part to come in to repair the toilet in the accessible stall. Bi-weekly checks on progress with maintenance.

**Finding 6: Public Restroom-Food Court Women's & Men's** Door requires 9#'s (Women's) and 20#'s (Men's) of pressure to be opened (standard is 5# or less) Door closer does not take at least 5 seconds to close from an open position of 90 degrees to a position of 12 degrees from the latch-the door is very heavy and closes in 3 seconds (Women's and Men's) from an open position

- f. **Solution/Corrective Action:** Discuss with landlord/maintenance to determine feasible solution potentially adjust the closer.

**Finding 7: Public Restroom-Food Court Women's & Men's** The pipes below the lavatory are not insulated or otherwise configured to protect against contact.

- g. **Solution/Corrective Action:** Discuss with landlord/maintenance to determine feasible solution which may include installing insulation or a cover panel.

**Finding 8: Public Restroom-Food Court Women's & Men's** Are the operable parts of the soap dispenser are not within specified ranges. Soap dispenser operable parts should be no higher than 44 inches above the floor- Soap dispenser measures 49.5 in (Women's) and 52 in (Men's)

- h. **Solution/Corrective Action:** Discuss with landlord/maintenance to determine feasible solution which may include adjusting the dispenser or replace/provide additional dispenser

**Finding 9: Public Restroom-Food Court Men's Handicapped Stall-**the centerline of the water closet no less than 16 inches and no greater than 18 inches from the side wall or partition-Measures 21 inches

- i. **Solution/Corrective Action:** Discuss with landlord/maintenance to determine feasible solution. This would require toilet to be moved, replaced, or the partition moved.



## Mississippi Valley Workforce Development Board

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**TO:** Mississippi Valley Workforce Development Board

**FROM:** Chad Pratz

**DATE REPORT SUBMITTED:** 6/17/22

**SUBJECT:** 1801 E Kimberly RD Davenport, IA 52806 Accessibility Assessment Summary

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**DATE OF ASSESSMENT:** 6/7/22

**INDIVIDUAL(S) CONDUCTING ASSESSMENT:** Chad Pratz, IVRS supervisor

### **PURPOSE**

This report is to provide Mississippi Valley Workforce Development Board (MVWB) with an overview of the process used to assess accessibility for the Davenport Iowa *WORKS* Center as well as the results of the assessment including findings and solutions/corrective actions taken to address those findings. The completion and submission of this report to the MVWB allows for appropriate oversight over center operations and compliance with Americans with Disabilities Act (ADA) to provide equal access to services and programs offered.

### **PROCESS**

Our team conducted the assessment using the ADA Checklist for existing Facilities based on the 2010 ADA Standards for Accessible Design. We assessed Approach & Entrance to the center (including parking lot); Center Interior-Access to Services; Toilet Rooms; Additional Access to include alarm systems and drinking fountains in order to complete the tool and determine where there exist any significant accessibility barriers.

### **SIGNIFICANT ACCESSIBILITY BARRIERS FOUND**

#### **Finding 1:**

#### **Approach and Entrance**

##### **1.5**

- The parking lot does not have a minimum of one van accessible space.
  - Recommendation: Add a van accessible space or make the current accessible space Van Accessible. Van accessible spaces must be at least 11 feet wide with an adjacent access aisle at least 5 feet wide OR the van accessible space must be at least 8 feet wide with an adjacent access aisle at least 8 feet wide.
  - Appropriate signage indicating the Van Accessible space must be installed at the appropriate height.

##### **1.10**

- The signs in the parking lot are low. They measured 43 and 55 inches.
  - Recommendation: The signs needs to be raised to 60in

**Solution/Corrective Action:** Review recommendation with the landlord and discuss with the

center manager.

**Finding 2:  
Access to Goods and Services**

**2.43**

- 27 doorknobs need to be replaced throughout the building. The doors should be equipped with hardware that is operable with one hand that *does not* require tight grasping, pinching, or twisting of the wrist.
  - Recommendation: Replace inaccessible knob with lever, loop or push hardware.

**Solution/Corrective Action:** Review recommendation with Landlord and discuss with the center manager

**Finding 3:  
Toilet Room**

**3.11**

- Bathroom door takes 28 pounds of force to open and needs to be 5 at 5 pounds
  - Recommendation: Adjust or replace closers, install a lighter door or add an automatic door

**3.28**

- Towel dispenser is too high at 56.5 inches and needs to be max of 48
  - Recommendation: Adjust dispenser height or replace or provide additional accessible dispensers

**Solution/Corrective Action:** Review recommendation with Landlord and discuss with the center manager

# Travel Policy Modifications



## Mississippi Valley Workforce Development Board

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### Travel Policy

**Approved:** September 27th, 2021

**Effective Date:** September 27th, 2021

**Amended Date:** N/A

#### A. Purpose

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1. Establish a travel policy for reimbursement of expenditures incurred in the performance of duties ~~by~~ responsibilities that directly support the mission of the Mississippi Valley Workforce Development Board (MVWDB). MVWDB stakeholders covered by this policy include: ~~for~~ board staff, board members, committee members, ~~and~~ CEOs, and board contractors and subrecipients referred to as “representatives”.

#### B. Background

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1. The Workforce Innovation and Opportunity Act (WIOA) allows reimbursement of travel costs incurred in the performance of administrative and program functions. Reasonable travel costs necessary to effectively manage the grant, provide oversight, and measure program effectiveness are allowable.

#### C. Policy

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1. It is the policy of the MVWDB to reimburse individuals representatives for travel expenses incurred in the performance of duties under WIOA. Such reimbursement must meet requirements outlined in the Code of Federal Regulations (CFR).

#### D. Guiding Principles

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1. Reimbursement for travel is authorized for official MVWDB and nonprofit corporation business within the budgetary limits established in the annual budget.
2. Written permission must be obtained from executive director or board chair prior to travel unless specifically related to normally scheduled board, committee, CEO meetings, trainings, or routine MVWDB business within the Local Area.
3. A travel expense form must be completed by anyone requesting reimbursement.
4. CEOs can only request reimbursement when travel is outside the state of Iowa.
5. The completed form should be submitted to the MVWDB executive director or their designee for approval and processing. Expense forms should be submitted no less frequently than monthly. Additionally, all expenses are reviewed by the fiscal agent prior to processing.
6. The executive director’s out-of-town the expenses for travel outside the Mississippi Valley Workforce Area (MVWA) will be approved by the board chair prior to submittal to the fiscal agent for processing.

7. No reimbursement will be provided if the traveler receives reimbursement through other sources, double dipping is prohibited and subject to criminal and civil action to recover expenses.
8. All incurred expenses must be supported by adequate documentation. (Conference or meeting agendas, invoices, hotel bills, receipts, etc.) See 2 CFR Part 225.
9. Guard against questionable costs by using the “reasonable costs” as the standard for spending. (avoid extravagant meals/hotels for example).
10. The MVWDB is a fiscal recipient and is the custodian of federal funds, which must be safeguarded and used only for legitimate business purposes to perform responsibilities that directly support the mission of the board.
11. “Reasonable costs. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost.” 2 CFR Part 225 Appendix A.

Commented [LR1]: I like the idea of using the “reasonable cost” definition as a standard. So I just connected the original idea on line 9 to line 11

Commented [LR2]: I’m being a semantics pick here, but technically the board is not a business so I just clarified. Feel free to ignore if you think this is unnecessary

#### **E. Mode of Travel**

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1. MVWDB representatives are expected to select a mode of transportation, which is least expensive, taking into consideration both time and distance involved.
2. A receipt will be required for travel by common carrier such as air, rail, or bus. Reimbursements will be for actual costs incurred.
3. Air travel reservations should be made as far in advance as possible in order to take advantage of reduced fares.
4. Only the cost of the lowest coach class fare available for direct, non-stop flights from the airport nearest the representative’s home or office to the airport nearest the destination will be allowed.
5. One checked bag each way for a roundtrip fare is an allowable cost as well as the cost of a carry-on bag.
6. The use of rental cars should only be used under very specific circumstances and must have prior written approval from the MVWDB board chair.

#### **F. Mileage Reimbursement**

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1. Miles driven should be calculated using the representatives home address as the starting point and should exclude personal commute miles. Return trips should use the site of the MVWDB involved business as the starting point and the representatives home address as the ending point.
2. The mileage reimbursement rate is calculated to assist with fuel costs as well as wear and tear on the automobile.
3. The current GSA mileage per diem rate will be used <https://www.gsa.gov/travel/plan-book/transportation-airfare-pov-etc/privately-owned-vehicle-pov-mileage-reimbursement-rates>.
4. A Google map showing actual miles must be submitted with the travel reimbursement form.

## **G. Lodging**

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1. If the event in question is hosted at a hotel, the negotiated conference rate may be acceptable but should be approved in advance by the MVWDB executive director or designee if the rate exceeds the GSA per diem rate for lodging. Tips and room service fees are considered part of per diem and are not reimbursable.
2. Representatives traveling on behalf of MVWDB may be reimbursed at the single room rate for the reasonable cost of hotel accommodations. Convenience, the cost of staying in the city in which the hotel is located, and proximity to other venues on the representative's itinerary shall be considered in determining reasonableness.
3. Any **lodging outside of the MVWA** must be approved at least 14 days in advance by the executive director or designee.
4. The specific location rate will be determined using the GSA rate and adhered to whenever possible. When the GSA rate cannot be followed written explanation of why will be required.

## **H. Meals**

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1. The costs of meals and refreshments are allowable with conditions. However, in accordance with the authorities cited above, costs can be incurred only when necessary and reasonable for the proper and efficient performance and administration of a grant award. While the allowability of such costs is determined on a case-by case basis, it is important to consider:
  - a. The reasonableness of the aggregate costs to demonstrate that Boards have acted with due prudence in circumstances, considering their responsibilities to the government unit, its employees, the public at large, and state or Federal Government.
  - b. Aggregate costs periodically-e.g., over a 12-month period will be reviewed to identify needed changes to the policies in order to avoid incurring individual and aggregate costs that appear excessive or lavish.
  - c. Tips are allowable up to 20%.
  - d. No alcoholic beverages are permitted.
  - e. All meal receipts must be itemized.
  - f. Reasonableness of the cost of meals will be determined by comparing to the allowable GSA per diem rate for the specific area.
2. Examples of when a reasonable need arises to incur such costs include, but are not limited to, the following:



- a. Allowable costs of meals incidental to the cost of meetings and conferences where the primary purpose is the dissemination of technical information.
- b. Costs of meals incidental to the cost of meetings and conferences are allowable when the grantee incurs such costs in the process of conducting meetings or conferences with external customers and other professional colleagues outside of the entity's organization.
- c. The cost of a "working lunch" with external customers and other colleagues is considered "reasonable and necessary" when there is adequate documentation on the reason of having the meeting during mealtime hours.

**I. Miscellaneous Reimbursements:**

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- 1. Like all disbursements of WIOA funds, reimbursements should be adequately documented, reasonable, directly or indirectly allocable to one or more grants.
- 2. Miscellaneous expenses are those deemed necessary in the conduct of the official business of the MVWDB, which are not included in the categories of mode of travel, lodging, mileage, and meals.
  - a. All miscellaneous expenses shall be claimed under the column heading "miscellaneous expense" on the travel form and be supported by sufficient documentation.
  - b. A receipt for each and every transaction involving miscellaneous expenditures shall be provided.
  - c. Receipts are required for such things as:
    - i. admission tickets
    - ii. registration receipts
    - iii. parking/taxi fees
    - iv. stamp purchases
    - v. supplies
    - vi. telephone calls
- 3. Some of the more common miscellaneous expenses are:

- a. *Fax Copies* - Expenses incurred to send or receive information via fax for business purposes shall be allowed. An actual receipt must be attached to the travel payment.
- b. *Purchase of Supplies* - The purchase of stationery and all other similar supplies shall be allowed in emergencies warranting their use for handling of official business on official travel and shall be submitted and certified on a travel payment with the proper invoices or receipts attached.
- c. *Collision Damage Insurance* - When renting an auto for MVWDB business, collision damage insurance paid to the auto rental company is an allowable expense. To receive reimbursement, the actual receipt must be attached to the travel claim.
- d. *Laundry and Dry Cleaning* - Reasonable laundry and dry-cleaning expense is allowed when the employee's travel exceeds five (5) working days. Actual receipt or documentation on the hotel bill must be attached to the travel claim when it is the hotel facilities that are utilized. Laundry mats may be used to save money. Use of the laundromat should be properly documented on the claim.
- e. *Internet Access* - Internet access charges shall include an explanation for the business purpose on the claim.
- f. Cost of shuttle or Uber/Lyft services to and from the airport or the cost of airport parking
- g. Taxi services, Uber, Tolls, garage, and parking fees as a result of conducting WIOA business are reimbursable with receipt.

#### **J. Credit Card Usage**

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- 1. MVWDB staff have the authority to use the MVWDB credit card while on business travel as long as the expenditures are within the guidelines outlined in this document and receipts are provided.
- 2. Should receipts not be furnished to MVWDB the staff will reimburse MVWDB for the associated costs within 30 days. .
- 3. When booking lodging, travel, conference fees, and other miscellaneous purchases, it may be necessary to use the MVWDB credit card. After written approval is received from the executive director for such expenses, the employee will be authorized to use the credit card information.
- 4. It is imperative that the employee obtain a receipt at the time of purchase or at point of receiving the service.
  - a. That receipt will be given to the Executive Director so he/she will be able to verify the credit card charges.
  - b. Upon verification of all charges the executive director will include all receipts when submitting the credit card bill to the fiscal agent for payment requests.

#### **K. Travel Request Process and Procedure**

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- 1. Expenses will not be reimbursed unless the representative requesting reimbursement submits a written Expense Report.
- 2. The Expense Report, which shall be submitted at least monthly or within two weeks of the

completion of travel, if travel expense reimbursement is requested, must include:

- a. The representatives name.
  - b. If reimbursement for travel is requested, the date, origin, destination, and purpose of the trip, including a description of each MVWDB related activity during the trip.
  - c. The name and affiliation of all people for whom expenses are claimed (i.e., people on whom money is spent in order to conduct MVWDB business.
  - d. An itemized list of all expenses for which reimbursement is requested.
3. Any delays in submission will cause delays in processing and timelines may be extended.
  4. Board chair/board staff will verify the travel expense form to receipts and approve for processing within 5 business days.
  5. Board staff will email travel expense form to the Fiscal Agent for processing.
  6. All travel expense form payments will be processed and paid by the Fiscal Agent within 30 days of receipt.

#### **L. Non-Reimbursable Expenditures**

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1. MVWDB maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement under federal grants and a nonprofit, charitable organization.
2. Expenses that are not reimbursable include, but are not limited to:
  - a. Travel insurance.
  - b. First class tickets or upgrades.
  - c. Limousine travel.
  - d. Movies, liquor, or bar costs.
  - e. Spa or exercise charges.
  - f. Clothing purchases.
  - g. Valet service / car washes.
  - h. Toiletry articles.
  - i. Expenses for spouses, friends, or relatives.

#### **M. Personal Travel**

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1. Representatives traveling on behalf of MVWDB may incorporate personal travel or business with their MVWDB related trips; however, personnel shall not arrange MVWDB travel at a time that is less advantageous to MVWDB or involving greater expense to MVWDB in order to accommodate personal travel plans.
2. Any additional expenses incurred as a result of personal travel, including but not limited to extra hotel nights, additional stopovers, meals or transportation, are the sole responsibility of the representative and will not be reimbursed by MVWDB.
3. Expenses associated with travel of a representatives spouse, family or friends will not be reimbursed by MVWDB. When combining personal and business travel it should be clearly identified on the travel expense form required.

**N. Reasonable Accommodations**

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1. The Americans with Disabilities Act (ADA) and the Americans with Disabilities Act Amendments Act (ADAAA)—as well as relevant state law—require employers to provide reasonable accommodations to allow qualified individuals with disabilities to perform the essential functions of their jobs. It is the policy of the MVWDB to comply with all Federal and state laws concerning the employment of persons with disabilities.

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

**Travel Expense Form**

Submitted by: \_\_\_\_\_ Date: \_\_\_\_\_ Dates of Travel: \_\_\_\_\_

Origin: \_\_\_\_\_ Destination: \_\_\_\_\_

Representatives for Whom Reimbursement is Being Requested \_\_\_\_\_

Reason for Travel: \_\_\_\_\_

Expenses (All expenses must be accompanied by itemized receipts)

**Reimbursements**

	<b># of Receipts</b>	<b>Amount</b>
Mileage (\$0.58.5 per mile)	_____	\$ _____
Meals	_____	\$ _____
Transportation (Uber, taxi, etc)	_____	\$ _____
Lodging	_____	\$ _____
Airfare/Baggage	_____	\$ _____
Miscellaneous Specify	_____	\$ _____
Total Reimbursement		\$ _____

Executive Director/Board Chair  Approve  Not Approved

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Are there any credit card charges associated with this trip? If yes, please list related charges and amounts?

\_\_\_\_\_

\_\_\_\_\_

Additional Comments:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_