



Mississippi Valley Workforce Development Board

Full Board Meeting Agenda

Monday, February 26, 2024, 1:00 p.m. – 2:30 p.m.

In-person – Burlington IowaWORKS 550 S. Gear Ave Ste 35 West Burlington, IA 52655

Join Zoom Meeting

<https://us02web.zoom.us/j/86251750923?pwd=d0Njb3pBMllsZzRyZGxNUHVvSk3QT09>

Meeting ID: 862 5175 0923

Passcode: 272965

One tap mobile +13126266799,,86251750923#

1:00	Call to Order	Dennis Duke
	Roll Call	Louise Butherus
	Introductions/New Members	Dennis Duke
	*Consent Agenda	
	Excused Absences	
	Approval of Agenda	
	Approval of Previous Minutes	
	Financial Report Summary	
1:05	Metrix Learning Demo	Sandy Mead
1:25	Standing Committee Reports	
	Executive Committee Report (Page 42)	Dennis Duke
	Finance Committee Report (Page 43)	Ryan Drew
	Youth Committee Report (Page 44)	Jacob Nye
	Operations Committee Report (Page 45)	Matthew Nicol
	Business Committee Report (Page 46)	Mandy Parchert
	Disability Access Committee (Page 47)	Cindy Whalen
	New Business	
1:40	*Local Plan (Page 48)	Mandy Tripp
1:45	*Strategic Plan Approval (Page 49)	Board Staff
1:55	*Adult/DW RFP Committee Rec (Page 59)	RFP Committee
2:00	*Youth RFP Committee Rec (Page 60)	RFP Committee
2:05	*OSO RFP Committee Rec (Page 61)	RFP Committee
2:10	*Travel Policy Modification Page 62)	Miranda Swafford
2:15	*Individual Training Acct Policy Mod (Page 71)	Miranda Swafford
2:20	Board Staff Updates (Page 78)	Board Staff
	Other Business	
	Public Comment	
	*Adjournment	Dennis Duke

*Items Requiring a Vote, ** Items Requiring a Roll Call Vote

Accommodations are available upon request for individuals with disabilities. If you need accommodation, please contact Mandy Tripp at mandy@mississippivalleyworkforce.org

Consent Agenda

Documents Included: Agenda, Previous Meeting Minutes, Newsletter, Financial Report Summary

Action Requested: Approve consent agenda



Mississippi Valley Workforce Development Board

Quarterly Board Meeting Minutes November 20, 2023

The meeting of the Mississippi Valley Workforce Development Board (MVWDB) was held on Monday, November 20, 2023, at 1:00 p.m. in-person at Kent Conference Center in Muscatine with a Zoom conferencing option.

CALL TO ORDER

Phillips called the meeting to order at 1:08 p.m.

ATTENDEES

Board Members Present: Kirby Phillips, Matthew Nicol, Joyce Stimpson, Lori Bassow, Heather Halbrook, Ryan Drew, Cory Bergfeld, Jacob Nye, Cynthia Whalen, Regina Matheson, Carol Reynolds, Mandy Parchert, Caitlin Bliesener, Kimberly Jaber

Board Members Absent: Dennis Duke (excused), Andy Sokolovich (excused), Nick Flogel (excused), Martha Bell (excused)

CEO Present: Jim Irwin, Danny Chick, Shane McCampbell, Chuck Holmes, Chad White

Staff: Miranda Swafford, Executive Director, Andrea Taylor, Strategic Partnership Specialist, and Mandy Tripp, Compliance Officer, Tyler Lanz, Communications Assistant

Contractor Staff: Cherisa Price-Wells, Regional Project Director, Tabytha Siegfried, Quality Assurance, Taylor Longstreth, Operations Supervisor, Shannon Weaver, Operations Supervisor, Nick Clayton, One-Stop Operator, Jennifer Schuster, Business Service Consultant, Jamie McLaughlin, Business Service Consultant

Guest: Ulisse Gallo, Econovue, Brian Hernandez, Phalanx Outreach Solutions, Jen Burmel, Kent Corporation, Tracie Timmerman, LVER, Katelyn Orth, Business Engagement Consultant, Martha Garcia-Tappa, Business Engagement Consultant, Brian Dennis, Bureau Chief of Business Engagement, Erica Lee, Safer Foundation

QUORUM

A quorum was established for the board to conduct business.

CONSENT AGENDA

The consent agenda included approval of the agenda, previous meeting minutes, Dennis Duke, Andy Sokolovich, Nick Flogel, and Martha Bell's excused absences, the quarterly newsletters, and the financial report summary. Parchert made a motion to approve the consent agenda, seconded by Drew, and the motion carried.

ECONOVUE DEMO

Tripp introduced Gallo, who provided a demo of the Econovue labor market information platform and discussed its potential uses for workforce development boards for targeted business outreach. Gallo highlighted the platform's ability to provide business-specific information, including contact information, size of company, and financial stress indicators to predict growth or risk of closure or layoff. There was a discussion about the differences between Econovue and

Lightcast, which the board already subscribes to. Lightcast provides more of an economic overview, incorporating data from approximately 10,000 businesses in the Mississippi Valley Workforce Area. Econovue identifies and incorporates data from more than 21,000 businesses in the MVWA and is updated more frequently than other Labor Market Information platforms.

EXECUTIVE COMMITTEE REPORT

Phillips summarized the report advising the policies that have been updated and approved, as well as the PY22 Annual Report, the updated Ticket to Work Budget, and a transfer request in the amount of \$50,000 from the DW funding stream to the Adult budget. Phillips also advised that the fiscal agent did not file the Form 990 paperwork by the deadline, nor did they respond to email communications, and the board's 501(c)3 status was automatically revoked. Swafford filed the necessary forms and the board has been reinstated as a 501(c)3 nonprofit organization.

FINANCE COMMITTEE REPORT

Drew summarized the report, advising that the one stop operator invoices, adult, dislocated worker, and youth program invoices, and fiscal agent invoices were approved for the months of July, August, and September.

BUSINESS COMMITTEE REPORT

Parchert presented the report, highlighting that Retrain and Retain grant applications for Hahn Ready Mix and Allied Valve were both approved, as well as Attachment K of the MOU, which outlines the business service plan. Parchert advised that they have paused Retrain and Retain grant awards pending FY24 funding, but they have two applications completed and ready to be reviewed at the next opportunity.

OPERATIONS COMMITTEE REPORT

Nicol reviewed the report, including the approvals of MOU Attachments D, F, and G which outline the Referral Process, Outreach Plan, and Data Sharing Training Plan respectively. Nicol highlighted the 8 hiring events hosted in August, September, and October, especially the Quad Cities Success Fair and the Southeast Iowa Job Fair which were both well attended. Nicol advised the delayed FY24 funding is causing significant disruptions in service delivery for the Adult and Dislocated Worker programs.

YOUTH COMMITTEE REPORT

Nye summarized the report, advising there were no approvals for this quarter, and discussed that he is eager to see the results of some of the initiatives taken over the past couple years to boost youth performance measures.

DISABILITY ACCESS COMMITTEE REPORT

Whalen presented the report, discussed the approval of MOU Attachment E: Accessibility Plan, and gave an overview of the disability access survey that was conducted and the National Disability Employment Awareness Month event hosted at the Burlington center in October.

***MODIFIED BUDGETS**

Swafford discussed that \$50,000 was transferred from the DW funding stream to the Adult budget. The state also reallocated unused DW funds back to local areas and we received \$48,838.

Weaver presented the draft budgets and narrative, discussing that the modified budgets did not account for FY24 funds since they have not been received yet. Weaver advised these modified budgets will allow them to sustain operations of the Adult and Dislocated Worker programs through December 31, 2023, at which point staff will be laid off if we have not received the FY24 funds. Irwin asked whether the delay is related to the potential government shutdown, and Swafford advised that other states have received their funding from the Department of Labor, but Iowa has not and there are no updates from the state on when those funds can be expected. Stimpson made a motion to approve the modified budgets, seconded by Reynolds, and the motion carried.

WORKFORCE COMMUNITIES OF ACTION UPDATES

Lanz reviewed the draft action plan for the Workforce Communities of Action initiative, highlighting the theme of adapting outreach strategies to increase youth and employer engagement. The Action Plan will be submitted and could be selected for seed funding. Phalanx Outreach Solutions was consulted and has drafted a campaign proposal.

PHALANX CAMPAIGN PROPOSAL

Hernandez provided an overview of Phalanx Outreach Solutions' services and reviewed their campaign goals, objectives, and target audiences. The project would take place over two phases, the first of which would target employers and industries to promote the Accelerate Iowa programming through video storytelling, testimonials, and partnerships. Phase Two would expand website and social media content to provide information about educational pathways for youth.

JOB QUALITY ACADEMY UPDATE

Taylor reviewed the progress to date, which included attending the second in-person summit in Washington D.C. in September, developing the action and strategic plans, and creating the Employer and Job Seeker surveys. The surveys were submitted to the St. Ambrose Institutional Review Board and have been approved. In addition to the board's website and social media platforms, the employer survey can be found at www.tinyurl.com/EmployerJQA and the employee/jobseeker survey can be found at www.tinyurl.com/JobSeekerJQA. Once data is collected, the results will be used to inform a conference for local employers to learn more about the Good Job Principles and perceptions of Job Quality in our local area.

RFP COMMITTEES

Swafford advised that the RFP process will be beginning again in the Spring for the Adult/Dislocated Worker program and the Youth program. A committee for each RFP will need to be assembled and will ideally begin meeting in December. Swafford asked for volunteers from the board to participate in the Adult/Dislocated Worker and Youth RFP Committees. Reynolds volunteered for the Youth RFP Committee and Phillips volunteered to participate in the Adult/Dislocated Worker RFP Committee. Any other board members interested in participating can contact Tyler Lanz.

ANNUAL PERFORMANCE

Tripp presented the annual performance data. The Adult program met their deliverables, the Dislocated Worker program was slightly below their goal for Employment in 2nd and 4th quarter,

and the Youth program did not meet several of their goals. Tripp highlighted the time frame of these reports and advised that the only real-time measurement is Measurable Skills Gain. There has been a significant increase in Youth Measurable Skills Gain from PY21 to PY22.

BOARD STAFF REPORT

Swafford provided general updates, including an update on monitoring, Local Plan progress, and MOU and IFA development. The new newsletter, Mississippi Valley Voices, was rolled out and will be combining with the previous Quarterly Advisor newsletter. Board Staff participated in several events, including panel discussions, presentations for local and statewide community partners, an appearance on Paula Sands Live to promote the Job Quality Academy, and a presentation at the NAWDP Youth Symposium on our Virtual Reality program. Swafford advised that board staff have submitted three presentation proposals for the NAWB Forum 2024 on Virtual Reality, Job Quality Academy, and Accessibility. Swafford is still working on diversifying funding, and has an upcoming meeting with the Family and Worker Fund to discuss potential opportunities for support with the Job Quality Academy initiative.

Swafford reviewed the annual subleases for the Davenport and Burlington centers, as well as the current cost breakdown among the partners. Swafford advised that the IFA will require all partners to participate in cost sharing regardless of collocation as of July 1, 2024. Development of the IFA is ongoing and will be presented at the February board meeting.

Swafford reviewed upcoming events. The 4th annual board training will be November 30, 2023 in Burlington. The registration deadline is Wednesday, November 22, 2023 by end of day. In January, IWD will have the Center for Workforce Excellence International provide training on launching sector boards and partnerships. The NAWB Forum 2024 will be March 23-26, 2024 in Washington D.C. Any board members interested in attending should contact Tyler Lanz.

The next full board meeting will be held in Burlington on February 19, 2024.

OTHER BUSINESS

There was no other business.

PUBLIC COMMENT

There were no public comments.

***ADJOURNMENT**

Parchert made a motion to adjourn the meeting, seconded by Drew, and the motion carried. Phillips adjourned the meeting at 2:32 p.m.

Mississippi Valley Voices: Empowering Our Workforce Together

October 1, 2023 - December 31, 2023

Upcoming Events

Mississippi Valley Advanced Manufacturing Sector Board Meeting

February 8, 2024
8:30 a.m. - 10:30 a.m.
Sears Seating
1718 S Concord St.
Davenport, IA 52802



Together, industry leaders collaborate to align workforce development strategies with the needs of the industry to bridge skills gaps, increase awareness of career pathways, and promote talent development. Join us for the quarterly in-person meeting of the Advanced Manufacturing Sector Board!

Iowa *WORKS* Center In-Service Training

February 19, 2024
8:30 a.m. - 4:30 p.m.
Kent Conference Center
1600 Oregon St.
Muscatine, IA 52761



Iowa *WORKS* offices are closed for in-service training.

Iowa Workforce Development Sector Partnerships/Sector Solutions

Date and Location TBD
Current dates in consideration are February 21 - 22 or February 28 - 29, 2024. Complete [this form](#) to indicate your interest and date preference.

IWD has been working with the Center for Workforce Excellence International to obtain information and feedback about sector partnerships in Iowa. The next step is to host convenings to provide training and resources that will support stakeholders in the



workforce space such as employers, economic developers and chambers, educational institutions, nonprofits, local workforce development board members, government partners, and anyone working to support successful workforce outcomes!

In-Person Mississippi Valley Workforce Development Board Meeting

February 26, 2024

1:00 p.m. - 2:30 p.m.

Iowa *WORKS* Burlington

550 S Gear Ave. Suite 35

West Burlington, IA 52655

Join us for the quarterly in-person meeting of the full Mississippi Valley Workforce Development Board!



Leap Into Inclusion: Disability Awareness Lunch & Learn for Employers

February 29, 2024

11:00 a.m. - 1:00 p.m.

Iowa *WORKS* Davenport

1801 E Kimberly Rd. Suite A

Davenport, IA 52807

Join us for information and resources, a Business Panel Discussion, and an interactive Windmills Disability Sensitivity and Inclusion Workshop!

Lunch will be provided to registered attendees. Please RSVP by Friday, February 23, 2024 using [this link](#).



National Association of Workforce Boards Forum 2024

March 23 - 26, 2024

The Washington Hilton

1919 Connecticut Ave. NW

Washington, D.C. 20009

Learn directly from the nation's most informed experts about workforce policy, initiatives, and trends. Be inspired by our cohort of recognizable keynote speakers and the best workforce development experts from around the nation, and prepare to advance tomorrow's workforce today.

For more information, visit www.forum.nawb.org.



Announcements

November 6, 2023

The board was featured on Paula Sands Live to

November 27, 2023

Communications Assistant Tyler Lanz was

help launch the Job Quality Academy initiative.

November 6-8, 2023

Executive Director Miranda Swafford and Compliance Officer Mandy Tripp presented at the National Association of Workforce Development Professionals Youth Symposium about Virtual Reality.

November 9, 2023

Communications Assistant Tyler Lanz participated in a panel discussion at Lee County Economic Development Group.

accepted into the Quad City Chamber of Commerce's 2024 Leadership QC cohort.

January 1, 2024

Tyler Lanz started as the Strategic Partnership Specialist.

January 2, 2024

Compliance Officer Mandy Tripp was accepted into Grow Clinton's 2024 Leadership Institute.

January 16, 2024

Louise Butherus will start as the Communications Assistant.

Articles



Mississippi Valley represented Iowa at National Job Quality Academy in D.C.

The Mississippi Valley Workforce Development Board was one of 16 teams across the nation selected to participate in the U.S. Department of Labor's Job Quality Academy in Washington, D.C. earlier this year.

[See the full story on Paula Sands Live, KWQC!](#)

Board Member Spotlight

Board member Mandy Parchert was in the spotlight in November! She is the chair of the board's Business Committee and the facilitator of the Advanced Manufacturing Sector Board. We are grateful to have her on our team for her tireless commitment to our mission and invaluable contributions to the local workforce system.

She was spotlighted on Iowa *WORKS* social media platforms. You can view the full post on [LinkedIn](#) and [Facebook](#).

Mississippi Valley Workforce Development Board Member Spotlight

Mandy Parchert

What is your job title and who do you work for?
• Manager of University and Community Relations at HNI Corporation.
• I'm also the chair of the board's Business Committee and the facilitator of the Advanced Manufacturing Sector Board!

How long have you been a board member?
• 2 years

Why did you join the board?
• I joined the board to connect with other workforce development professionals and to be a part of the positive change impacting the workforce in our region.

Random fact about you?
• I had never been to Washington D.C. until I joined the board and had the opportunity to attend the National Association of Workforce Boards earlier this year!



Event Highlights

The "You Choose" Career Exploration event hosted on October 4, 2023 at the Clinton Advancement Center was attended by 76 youth!

Davenport and Burlington Iowa *WORKS* staff gathered together for In-Service Training on October 9, 2023. Topics included: Disability Inclusion, Social Media Strategy, and Partner Cross-Training.

The National Disability Employment Awareness Month Lunch & Learn event hosted on October 31, 2023 at Iowa *WORKS* Burlington was attended by 17 employers!

The 4th Annual Board Training was held at Greater Burlington Partnership in Burlington, IA on November 30, 2023. Topics included: WIOA Performance, Disability Inclusion, and Strategic Planning for the next 3 years.

Program and Services Updates



Enrollments: 5

Scholarships Awarded: 1

Work-Based Learnings: 3

Credentials Earned: 10

Average Customer Satisfaction Rate: 94.21%



Enrollments: 15

Scholarships Awarded: 2

Work-Based Learnings: 5

Credentials Earned: 11

Virtual Reality Simulations Completed: 41, mastering 88% of skills

"You Choose" Career Exploration Event: Hosted at the Clinton Advancement Center, this event on October 4, 2023 brought together employers from a variety of industries to provide education and hands-on activities to attendees. Pizza and beverages were sponsored by Grow Clinton. This event was attended by 76 youth, including one who drove more than 4 hours to attend!



Burlington Customers Served: 2,348

Davenport Customers Served: 5,417

Iowa *WORKS* Gives Back!
-Davenport collaborated with local businesses to host a blanket drive and used the previous year's Veterans Incentive Award to purchase blankets and boots for the Quad Cities Veterans Outreach Center.

-Burlington hosted a Veterans Day Luncheon, sponsored by several local companies.

-Burlington hosted a Thanksgiving Food Drive for the City Hope Foundation.

-Burlington staff donated more than 40 pounds of supplies, which were then assembled into care packages sent to two overseas military units.



Business
Services



Retrain &
Retain Grant



Job Quality
Academy

Job Fairs: 4

**Single-Employer Hiring
Events: 6**

Rapid Response:

- Danville Care Center
- Independent Can
- Southeast Iowa Regional Medical Center
- Darling Ingredients

**National Disability
Employment Awareness
Month Lunch & Learn:**
Burlington Iowa *WORKS* center partners came together to plan and facilitate a Lunch & Learn event on October 31, 2023. 17 local employers listened to a panel discussion, attended Disability Awareness & Inclusion training, and were able to earn SHRM and HRCI credit for their participation!

**Retrain & Retain Grants
Awarded:**

- Michelle's Vocational Placement, LLC. was approved to receive Job Coaching Certification training.
- Dynamic Tube, Inc. was approved to receive training on new technology which will streamline production, sales, and inventory processes.
- Titan Machinery was approved to receive CDL training.

For more information:
Contact [Tyler Lanz](#) or visit our [website](#) for more information about how your business can invest in upskilling your workforce!

**Employee/Job Seeker
Surveys Completed: 96**

We want to hear what local workers find important about their jobs! [Take the survey](#) to contribute to our research and be entered to win a \$100 gift card!

**Employer Surveys
Completed: 25**

Employers! We want to know how you are embracing the Good Job Principles to create thriving businesses in our local area! Help us inform and adapt our services to meet YOUR needs. [Take the survey today!](#)

Success Story/Testimonial

Precision Metal Works Recognized for Work-Based Learning Partnership!

Precision Metal Works in Maquoketa, IA was received an Excellence Award for their outstanding partnership with the Accelerate Iowa youth work-based learning program. Two youth participants have successfully completed On-the-Job Training and are now employed as welders.

Board Chair Dennis Duke and Interim Project Director Shannon Weaver presented the award to Charlene Fitzgerald, who also serves as a member of the Mississippi Valley Workforce Development Board's Youth Committee, at the 4th Annual Board Training on November 30, 2023.



Links

[Economic Overview](#)

[Labor Force and
Unemployment
Information](#)

[Mississippi Valley
Workforce
Development Board
Meetings, Minutes, and
Agendas](#)

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IA 52655

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

	Administration	Adult Program	Dislocated Worker Program	Youth Program Out of School
WIOA Grant Revenues				
WIOA Grant - Administration	\$171,141.89			
WIOA Grant- Adult		\$366,165.37		
WIOA Grant- Dislocated Worker			\$306,092.40	
WIOA Grant- Youth Out of School				\$517,677.96
WIOA Grant- Youth In School				
TOTAL	\$171,141.89	\$366,165.37	\$306,092.40	\$517,677.96
WIOA Expenses				
Board Salaries and Benefits	\$105,810.40	\$13,758.29	\$13,084.47	\$10,820.58
Fiscal Agent Costs	\$26,386.00	\$0.00	\$0.00	\$0.00
Subleases	\$0.00	\$26,786.12	\$26,706.13	\$20,661.12
Contractual RFP's	\$0.00	\$0.00	\$0.00	\$0.00
One Stop Operator	\$0.00	\$16,454.43	\$16,454.46	\$12,340.85
60110-60190 Salaries	\$0.00	\$131,324.39	\$117,675.84	\$223,394.69
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$0.00	\$29,476.32	\$28,518.36	\$53,158.71
60850 Mileage & Travel	\$7,787.69	\$2,803.10	\$3,772.02	\$11,218.16
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$155.79	\$2,290.32	\$1,928.68	\$5,399.10
62830, 62860 Outreach & Public Relations / Job Fairs	\$2,422.54	\$0.00	\$378.78	\$3,185.72
65610 Reimbursable Equipment	\$5,551.48	\$0.00	\$0.00	\$0.00
62510-62520 Resource Sharing Allocation	\$0.00	\$3,555.44	\$2,816.44	\$5,084.14
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$5,790.91	\$6,578.79	\$5,292.47	\$12,335.30
Information Technology	\$3,740.75	\$0.00	\$0.00	\$0.00
Dues & Subscriptions	\$6,651.50	\$0.00	\$0.00	\$0.00
Meeting Expenses	\$842.05	\$0.00	\$0.00	\$0.00
Conferences and Trainings	\$5,734.50	\$0.00	\$0.00	\$0.00
Printing	\$268.28	\$0.00	\$0.00	\$0.00
Special Initiatives/ Sector Strategy/Job Quality	\$0.00	\$0.00	\$0.00	\$0.00
Indirect Cost	\$0.00	\$18,359.77	\$16,727.91	\$32,726.83
Management Fee	\$0.00	\$27,400.74	\$21,712.29	\$33,528.92
65602, 65603 Work Experience	\$0.00	\$38,325.31	\$16,751.26	\$18,294.66
67408 Instructional Training	\$0.00	\$33,120.50	\$5,649.00	\$8,425.50
Incumbent Worker Training/ Youth System Strategy RFP	\$0.00	\$9,657.79	\$9,657.80	\$0.00
67412 Customer Support Service	\$0.00	\$14,035.37	\$32,928.83	\$19,672.03
67426 Individual Career Services- New Service	\$0.00	\$498.00	\$0.00	\$2,436.00
67422 On the Job Training	\$0.00	\$0.00	\$0.00	\$5,630.86
67418,67420 Client Awards/Incentives	\$0.00	\$4,624.31	\$0.00	\$49,550.00
5% WEX Markup	\$0.00	\$1,916.27	\$837.57	\$914.73
Unobligated/Unbudgeted Grant	\$0.00	\$1,654.54	\$1,654.55	\$1,240.91
TOTAL	\$171,141.89	\$366,165.37	\$306,092.40	\$517,677.96

CIJDC

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

	Youth Program In School	One Stop Operator	Year To Date	Total Annual Budget
WIOA Grant Revenues				
WIOA Grant - Administration		\$0.00	\$171,141.89	\$480,415.67
WIOA Grant- Adult		\$16,454.43	\$382,619.80	\$1,201,353.38
WIOA Grant- Dislocated Worker		\$16,454.46	\$322,546.86	\$929,840.84
WIOA Grant- Youth Out of School		\$12,340.85	\$530,018.81	\$1,201,225.52
WIOA Grant- Youth In School	\$148,505.66	\$4,113.62	\$152,619.28	\$335,812.37
TOTAL	\$148,505.66	\$49,363.36	\$1,558,946.64	\$4,148,647.78
WIOA Expenses				
Board Salaries and Benefits	\$3,606.85	\$0.00	\$147,080.59	\$407,197.87
Fiscal Agent Costs	\$0.00	\$0.00	\$26,386.00	\$59,956.00
Subleases	\$6,887.03	\$0.00	\$81,040.40	\$170,000.00
Contractual RFP's	\$0.00	\$0.00	\$0.00	\$0.00
One Stop Operator	\$4,113.62	\$0.00	\$49,363.36	\$107,875.62
60110-60190 Salaries	\$51,613.89	\$28,207.43	\$552,216.24	\$1,090,565.64
60310-60330 & 60610-60560				
Payroll Taxes, Fringe / Work Comp	\$12,905.72	\$7,467.24	\$131,526.35	\$341,902.90
60850 Mileage & Travel	\$2,584.58	\$3,539.83	\$31,705.38	\$98,044.78
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$1,673.89	\$540.14	\$11,987.92	\$26,594.00
62830, 62860 Outreach & Public Relations / Job Fairs	\$882.28	\$0.00	\$6,869.32	\$64,355.00
65610 Reimbursable Equipment	\$0.00	\$0.00	\$5,551.48	\$37,500.00
62510-62520 Resource Sharing Allocation	\$1,190.57	\$0.00	\$12,646.59	\$46,696.53
61745,64120,65120,65544,65520,65530,65125,65128, 65130 Professional Services and Business Expenses	\$2,846.53	\$570.49	\$33,414.49	\$69,175.01
Information Technology	\$0.00	\$0.00	\$3,740.75	\$8,000.00
Dues & Subscriptions	\$0.00	\$0.00	\$6,651.50	\$9,000.00
Meeting Expenses	\$0.00	\$0.00	\$842.05	\$5,000.00
Conferences and Trainings	\$0.00	\$0.00	\$5,734.50	\$20,000.00
Printing	\$0.00	\$0.00	\$268.28	\$3,000.00
Special Initiatives/ Sector Strategy/Job Quality	\$0.00	\$0.00	\$0.00	\$45,000.00
Indirect Cost	\$7,686.64	\$4,205.91	\$79,707.06	\$175,102.38
Management Fee	\$8,341.19	\$4,832.32	\$95,815.46	\$185,393.63
65602, 65603 Work Experience	\$19,117.53	\$0.00	\$92,488.76	\$352,075.25
67408 Instructional Training	\$0.00	\$0.00	\$47,195.00	\$324,381.40
Incumbent Worker Training/ Youth System Strategy RFP	\$0.00	\$0.00	\$19,315.59	\$107,205.00
67412 Customer Support Service	\$1,423.29	\$0.00	\$68,059.52	\$146,950.00
67426 Individual Career Services- New Service	\$0.00	\$0.00	\$2,934.00	\$19,023.95
67422 On the Job Training	\$12,876.16	\$0.00	\$18,507.02	\$50,000.00
67418,67420 Client Awards/Incentives	\$13,500.00	\$0.00	\$67,674.31	\$107,500.00
5% WEX Markup	\$955.87	\$0.00	\$4,624.44	\$17,603.76
Unobligated/Unbudgeted Grant	\$413.64	\$0.00	\$4,963.64	\$53,549.07
TOTAL	\$148,505.66	\$49,363.36	\$1,608,310.00	\$4,148,647.79

CIJDC

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

	<u>Remaining Budget</u>
WIOA Grant Revenues	
WIOA Grant - Administration	\$309,273.78
WIOA Grant- Adult	\$818,733.58
WIOA Grant- Dislocated Worker	\$607,293.98
WIOA Grant- Youth Out of School	\$671,206.71
WIOA Grant- Youth In School	\$183,193.09
TOTAL	<u>\$2,589,701.14</u>
WIOA Expenses	
Board Salaries and Benefits	\$260,117.28
Fiscal Agent Costs	\$33,570.00
Subleases	\$88,959.60
Contractual RFP's	\$0.00
One Stop Operator	\$58,512.26
60110-60190 Salaries	\$538,349.40
60310-60330 & 60610-60560	
Payroll Taxes, Fringe / Work Comp	\$210,376.55
60850 Mileage & Travel	\$66,339.40
62115, 65570, 63100-63130 Telephone, Postage, Supplies	\$14,606.08
62830, 62860 Outreach & Public Relations / Job Fairs	\$57,485.68
65610 Reimbursable Equipment	\$31,948.52
62510-62520 Resource Sharing Allocation	\$34,049.94
61745,64120,65120,65544,65520,65530,65125,65128,	
65130 Professional Services and Business Expenses	\$35,760.52
Information Technology	\$4,259.25
Dues & Subscriptions	\$2,348.50
Meeting Expenses	\$4,157.95
Conferences and Trainings	\$14,265.50
Printing	\$2,731.72
Special Initiatives/ Sector Strategy/Job Quality	\$45,000.00
Indirect Cost	\$95,395.32
Management Fee	\$89,578.17
65602, 65603 Work Experience	\$259,586.49
67408 Instructional Training	\$277,186.40
Incumbent Worker Training/ Youth System Strategy RFP	\$87,889.41
67412 Customer Support Service	\$78,890.48
67426 Individual Career Services- New Service	\$16,089.95
67422 On the Job Training	\$31,492.98
67418,67420 Client Awards/Incentives	\$39,825.69
5% WEX Markup	\$12,979.32
Unobligated/Unbudgeted Grant	<u>\$48,585.43</u>
TOTAL	<u>\$2,540,337.79</u>

Metrix Learning Demo



Professional Development

360 Degree Relationships
Building and Maintaining Trust
Business Ethics
Campus to Corporate
Creativity in the Workplace
Dealing with Setbacks
Digital Economy Skills
Diversity, Equity, and Inclusion
Facing Problems and Making Decisions
Improving Your Memory
Improving Your Work/Life Balance
Living and Working Abroad in the United States
Navigating through Organizational Change
Peer Relationships
Perseverance and Resilience
Polishing Your Professional Edge
Public Speaking Strategies
Telecommuting and the Remote Employee
Unconscious Bias

Adopting Systems Thinking
Building Likeability Skills
Business Ethics Essentials
Career Management
Critical Thinking Essentials
Developing Your Critical Thinking Skills
Discovering Your Strengths
Doing Business Professionally
Generating Creative & Innovative Ideas
Improving Your Personal Productivity
Interviewing Strategies for the Interviewee
Managing Your Career
Optimizing Your Work/Life Balance
Performance under Pressure
Perseverance at Work
Problem Solving and Decision Making
Skills for Effective Collaboration
Thinking Critically
Understanding Cognitive Bias

Analogical Thinking
Building, Rebuilding and Sustaining Trust
Business Etiquette and Professionalism
Creating Lasting Organizational Change
Dealing with Organizational Change
Difficult Boss Relationships
Diversity on the Job
Effective Time Management
Growth Mindset
Improving Your Reading Speed
Learning How to Learn
Mentor Relationships
Overcoming Procrastination
Performing Under Pressure
Personal Productivity Improvement
Problem Solving and Decision-Making Strategies
Staying Motivated at Work
Time Management
Writing Under Pressure



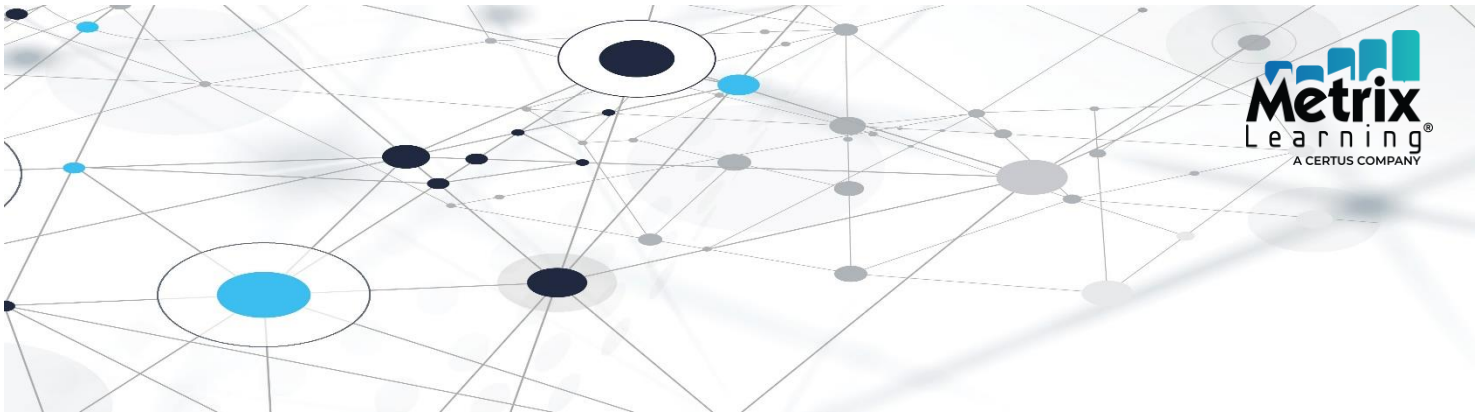
Participants, Incumbent Workers, Workforce Staff and others can access more than 7000 Metrix Learning courses covering 300+ skills track!

Prices as low as \$5.00 per user.

Use the QR code to learn more.

Sandy Mead
Vice-President
sandy.mead@metrixlearning.com





Essential Workplace Skills

Customized tracks for On-the-Job-Training (OJT) and Work Experience internships.

Track Name	Course Number	Course Name	Time in Minutes
Essential Skills 1	52510	Interacting with Customers	30
	52511	Communicating Effectively with Customers	30
	52615	Being an Effective Team Member	30
	52631	How Culture Impacts Communication	30
	52578	Procrastination: Admitting it is the First Step	20
	52964	Using Active Listening in Workplace Situations	34
	53298	Acting with Diplomacy and Tact	36
	52482	Writing Effective e-mails and Instant Messages	28
	52706	Becoming an Accountable professional	30
	52707	Becoming More Professional Through Business Etiquette	17
	52575	Uncovering and Utilizing your Talents and Skills	19
	52577	Establishing Self-confidence for Life	23
	52617	Effective Team Communication	31
	52261	Difficult people: Can't Change Them, so Change Yourself	31
	58624	Compliance Short: Social Media and Electronic Communications	6
37209	Thinking Critically: Coming to Terms with Assumptions	26	
			Total Time: 8 hours

Track Name	Course Number	Course Name	Time in Minutes
Essentials Skills 2	52572	Aligning Goals and Priorities to Manage Time	32
	52497	Trust Building through Effective Communication	28
	53191	Navigating the Workplace with Emotional Intelligence	26
	52512	Controlling Conflict, Stress, and Time in a Customer Service Environment	32
	52270	Taking Stock of Your Work/Life Balance	22
	64830	Earning and Offering Trust at Work	30
	52514	Polishing Your Skills for Excellent Customer Service	24
	52562	Bridging the Diversity Gap	27
	52569	Developing your Business Ethics	26
	53189	Navigating Your Own Emotions	29
	52576	Self-improvement for Lifelong Success	24
	53189	Navigating Your Own Emotions	29
	52256	Reaching Goals Using Perseverance and Resilience	27
	67138	Learning from Failure and Success	22
	52582	Understanding Unconscious Bias	25
52563	Your Role in Workplace Diversity	30	
			Total Time: 8 hours

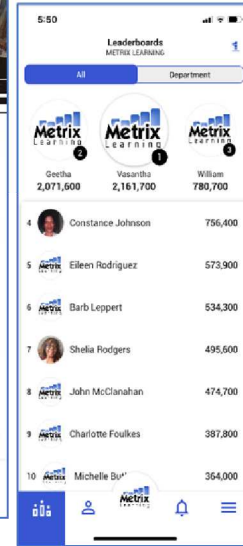
Prerequisites for Career Training

Increase performance outcomes with customized training before Individual Training Accounts (ITA's) are approved.

Track Name	Course Number	Course Name	Time in Minutes
Healthcare	52574	The Art of Staying Focused	30
	52562	Bridging the Diversity Gap	27
	58709	First Aid: Basic	76
	60754	First Aid: Automated external defibrillator	17
	58733	First Aid: CPR	20
	58743	First Aid: CPR (Compression only)	10
	58738	First Aid: Medical Emergencies	42
	58726	First Aid: Mental Health Awareness	29
	555009	Bloodborne Pathogen Awareness	25
	61456	Safety Short: Coronaviruses and COVID-19	26
	61693	Navigating the Post-Pandemic Workplace	8
	65382	HIPAA Privacy Essentials	30
	62390	HIPAA - Security Rule for Business Associates	33
	63125	HIPAA - Security Rule for Covered Entities	33
	63348	HIPAA - For Non-Medical Employees	19
			Total Time: 8 hours
Track Name	Course Number	Course Name	Time in Minutes
Commercial Driving	52574	The Art of Staying Focused	30
	67138	Learning from Failure and Success	22
	52582	Understanding Unconscious Bias	25
	52441	Take a Deep Breath and Manage Your Stress	22
	55513	Defensive Driving 2.0	16
	58711	Defensive driving: Truck safety	81
	58705	Driving safely, Driver smarter	49
	58708	Distracted Driving 2.0	19
	58725	Safe Backing of Tractor-Trailers	26
	58731	Safe Vehicle Backing	27
	58732	Emergency situations while driving	26
	59321	Urban Driving	21
	59331	Flatbed cargo securement	23
	64734	Hazardous Weather Driving for Commercial Vehicle Operators	36
			Total Time: 8 hours
Track Name	Course Number	Course Name	Time in Minutes
Information Technology	66104	Getting Started in Windows 11	47
	65935	Using the Universal Apps in Windows 11	40
	65977	Accessing and Managing Files in Windows 11	37
	65850	Configuring System Properties in Widows 11	36
	65890	Organizing & Searching for Files in Windows 11	32
	66009	Exploring the Productivity Tools in Windows 11	41
	66057	Managing Programs & File Types in Windows 11	29
	66105	Protecting & Backing up Data in Windows 11	41
	67207	Configuring & Optimizing a System in Windows 11	42
	67101	Exploring the Accessibility Tools in Windows 11	30
	67499	Managing User Accounts in Windows 11	28
			Total Time: 8 hours

HUNDREDS OF GAMES!

Demos & Pricing
sandy.mead@metrixlearning.com



Communication Skills

- Bias Defined
- Business Comms
- Communication Factors
- Communication Methods
- Do You Have a Smart Mouth?
- Face-to-Face Comms
- Handling Bias
- Handling Objections
- How to Win Friends
- Nonverbal
- Proactive on a Team
- Science of Bias
- Start With Why
- Unconscious Bias

Customer Service/Hospitality

- Customer Complaints
- Front Desk
- Greeting Customers
- Service 101
- Service Basics
- Saving & Budgeting

Food Industry

- Alcohol Service
- Bartending
- Cleaning Standards
- Closing
- Contact Etiquette
- Food Handler
- Food Safety
- Service Recovery
- Food Service
- Room Service

Job Search/Interviewing

- Behavioral Interviews
- Interview Prep
- Interview Skills
- Networking
- Personal Branding
- Public Speaking
- Relationship Pro
- Resume Ready
- Top 5 Questions to Ask

Workplace Skills

- 7 Habits
- Active Listening
- Art of the Follow-Up
- Attitude First
- Being Proactive
- Beyond the Office
- Building Rapport
- Building Teams
- Top Interview Tips
- Ultimate Interview Guide
- Virtual Etiquette
- Virtual Interview Prep

Leadership

- 21 Laws of Leadership
- Dare to Lead
- Deliver Powerful Feedback
- Effective Coaching
- Effective Executive
- Effective Feedback
- Feedback Bias
- Giving Feedback
- Inclusive Leader

Management

- 1-Minute Manager
- Acknowledging Opinions
- Conflict Management
- Difficult Convos
- Difficult Convos at Work
- Managing Diversity
- Managing Remote

Health Care

- Health Care Industry
- Health Science Occupations
- HIPAA

- Licensed Practical & Vocational Nurses
- Nursing Assistants

- Patient Confidentiality
- Registered Nurses

Digital Literacy

- Computer Files
- Computer Parts
- Excel
- Google Docs
- Google Meet
- Google Sheets
- Instant Messaging
- Microsoft Teams
- Microsoft Teams 2.0
- Microsoft Word
- Phishing
- PowerPoint
- Search Engines
- Smartphone Basics
- Social Media

Track Name	Course Number	Academics Course Name	Course Time in Minutes
Academics	52486	Using the Parts of Speech	31
Basic Grammar and Writing	52487	Getting the Details Right: Spelling Basics	29
7 courses	52488	Abbreviating, Capitalizing, and Using Numbers	33
approximate time for courses	52489	Using Punctuation Marks	30
and exams is 5 hours	52490	Creating Well-Constructed sentences	36
	52491	Troublesome Words and Phrases: Common Usage Mistakes in Writing	29
	52634	Audience and Purpose in Business Writing	28
Track Name	Course Number	Digital Literacy Course Name	Course Time in Minutes
Digital Literacy 101	55844	Being a Responsible Corporate Digital Citizen	23
Basic Security and Microsoft Suite	62989	Cybersecurity Short: Proper Password Management	7
9 courses	63274	Cybersecurity Short: Avoiding Phishing Attacks	6
approximate time for courses	55766	Keeping Your Skillset Current in the Digital Economy	18
and exams is 5 hours	62094	Embracing the Digital Opportunity	28
	56021	The New Gmail: Sending & Receiving Emails	65
	59151	Learn How To Touch Type	37
	63388	Learn How To Touch Type - Practice Exercises	30
	67663	Expanding Your Communication Skill Set (emails - text)	24
Digital Literacy 102	57947	Internet Explorer 11: Browsing the Web	45
Basic Security and Microsoft Suite	57561	Microsoft Edge 2018: Browsing the Web	59
10 courses	65059	Word 365: Getting Started	51
approximate time for courses	64991	Word 365: Formatting Text	56
and exams is 9 hours	64175	Excel 365: Getting started in Excel 365	66
	64179	Excel 365: Formatting cells and ranges	66
	64154	Outlook Microsoft 365: Setting up the application	33
	64155	Outlook Microsoft 365: Sending and receiving emails	37
	61656	Zoom: Creating, Joining & Managing Meetings	49
	54009	Microsoft Office 365 Teams: Call and Meeting Tools	26
Track Name	Course Number	Customer Service Course Name	Course Time in Minutes
Retail/Customer Service	10007	Creating an Effective On-hold Message	4
8 courses	52510	Interacting with Customers	210
approximate time for courses	52517	Providing Telephone Customer Service	60
and exams is 8 hours	52485	Keeping Business Calls Professional	23
	52519	Facing Confrontation in Customer Service	27
	52511	Communicating Effectively with Customers	30
	52512	Controlling Conflict, Stress, and Time in a Customer Service Environmen	32
	58372	Retail Safety	30
Administrative	52479	Administrative Support: Developing Your Essential Skills	60
9 courses	52325	Administrative Support: Interacting Effectively with Colleagues	60
approximate time for courses	52324	Administrative Support: Working in Partnership with Your Boss	60
and exams is 8 hours	52315	Maximize Your Productivity by Managing Time and Tasks	60
	52706	Becoming an Accountable Professional	30
	55881	Introducing Microsoft Office 365 Applications	60
	64154	Outlook Microsoft 365: Setting up the application	33
	64155	Outlook Microsoft 365: Sending and receiving emails	37
	64169	Outlook Microsoft 365: Organizing emails	45

Standing Committee Reports



Mississippi Valley Workforce Development Board

Executive Committee Report

Prepared for February 26, 2024 Full Board Meeting

Approvals:

- MOU Attachment H: Dispute Resolution Process.
- MOU Attachment I: Amendment and Modification Process.
- MOU Attachment J: Termination Process .
- Expected levels of performance for PY24 and PY25 for the local plan for Adult Dislocated Worker, and Youth programs. Proposing the same level as PY23.
- Budgets that included the FY24 funding for the Adult and DW programs.
- Q2 KPI report for the One Stop Operator.
- Modifications to the Retrain & Retain Grant policy.
- RFP's for release.

Highlights:

- Discussed changing travel policy to reflect a per diem for meals and incidentals.
- Reviewed Q1 performance.
- Still looking into hired and non-owned auto coverage to cover board staff.
- Louise Butherus has started as the new Communications Assistant.
- Matthew Nicol has resigned his membership with the board.



Mississippi Valley Workforce Development Board

Finance Committee Report

Prepared for February 26, 2024 Full Board Meeting

Approvals:

- One Stop Operator invoices
 - October - 8,438.67
 - November - 7,626.85
 - December - 7,813.01
- Adult program invoices
 - October -60,679.20
 - November - 42,961.72
 - December - 42,358.98
- Dislocated Worker program invoices
 - October - 36,543.23
 - November - 48,507.15
 - December - 37,860.37
- Youth program invoices
 - October - 111,715.20
 - November - 106,242.17
 - December - 90,377.08
- Fiscal Agent Invoices
 - October - 3,984.00
 - November - 4,366.00
 - December - 4,046.00



Mississippi Valley Workforce Development Board

Youth Committee Report

Prepared for February 26, 2024 Full Board Meeting

Approvals:

- The governor has applied for a waiver which would allow for 50% of funding be spent on In-School Youth and 50% of Out-of-School Youth, rather than the current ratio of 75/25. The approval was made to 'opt-in' should the waiver pass.

Highlights:

- As part of our outreach strategy, we viewed a demo called Engage by Cell, a texting platform geared towards bettering the way we engage with our youth participants.
- A video project that has been undertaken with Phalanx Outreach Solutions to spotlight the Youth Work Based Learning program is scheduled to be filmed March 12th.
- The Customer Satisfaction Rate for the Adult, DW, and Youth programs was 96.11% in January.



Mississippi Valley Workforce Development Board

Operations Committee Report

Prepared for February 26, 2024, Full Board Meeting

Approvals:

- ITA Policy Modification from \$5500 to \$6000 to cover increased tuition costs.
- Local Plan Section 2
- Adjusted Deliverables due to delayed funding.
- Social Media Policy Modification to add Iowa*WORKS* and Hootsuite access language.

Highlights:

- There were 13 hiring events hosted in November, December, and January which were attended by 348 job seekers. Most notable was Hire Talent Tuesday which went on the road to Fort Madison and saw 98 job seekers and 26 employers despite poor weather conditions.
- The Customer Satisfaction Rate was 87.5% in November, 69.6% in December, and 75% in January for the Iowa*WORKS* centers.
- AJC customer traffic in Burlington for November was 653, December 1141, January 1162. The Davenport center served 1547 customers in November, 2244 in December, and 2469 in January. The influx of customers is due to it being the time of year for an increase of Temporary Layoffs that occur yearly.



Mississippi Valley Workforce Development Board

Business Committee Report

Prepared for February 26, 2024 Full Board Meeting

Approvals:

- Rapid Response Policy Modification to more closely align with federal and state policies, provide guidance for informal notifications.
- Local Plan Section 3, Questions 1 through 4

Highlights:

- Retrain & Retain Grant applications are still open, there is about \$20,000 left to spend before June 30, 2024.
- Hire Talent Tuesday was held off-site at the Quality Inn in Fort Madison on January 23, 2024 and was attended by 23 employers and 98 job seekers, despite the snow!
- Tracie Timmerman helped to coordinate the first approved SkillBridge in Davenport since IWD became an approved 3rd party! Michelle's Vocational Placement, LLC has been approved for job coaches.
- Tracie also gave a presentation about SkillBridge to the Advanced Manufacturing Sector Board on February 8, 2024.



Mississippi Valley Workforce Development Board

Disability Access Committee Report

Prepared for February 26, 2024, Full Board Meeting

Approvals:

- The Local Plan Section was approved and is recommended for full board approval.

Highlights:

- Davenport is hosting a Leap into Inclusion event at the AJC that will provide employers with resource tables, an employer/participant panel, and a Windmills module.
- ADA Assessments have been completed for both centers.

Local Plan

Documents Included:

<https://www.dropbox.com/scl/fi/byxgtdwg7qgwu40a3mqgj/Draft-Local-Plan-12.28.23.docx?rlkey=89qdx29dvte2bj0q5jau99jq&dl=0>

Reason: The 4-year local plan must be posted for a 20 day public comment period prior to being submitted to the state on April 1.

The Local Plan has been reviewed in various sections by the committees and has incorporated partners feedback.

Action Requested: Approve Local Plan

Strategic Plan

Documents Included: Draft Strategic Plan and example of backend implementation plan tracking excel sheet.

Reason: This is the result of the stakeholder interviews and strategic planning session at the board annual training to outline our next 3 year goals.

Action Requested: Provide and feedback and approve the plan for implementation July 1.



Mississippi Valley Workforce Development Board

STRATEGIC PLAN JULY 1, 2024 – JUNE 30, 2027

VISION STATEMENT

Create strong local economies by developing a future-ready workforce of skilled workers prepared to meet the needs of current and emerging industries.

Example of New vision Statements

Foster robust local economies through the cultivation of a forward-looking workforce, equipped with the skills necessary to address the demands of both existing and emerging industries

Empower vibrant local economies by nurturing a forward-thinking workforce, equipped with the essential skills to meet the needs of current and evolving industries.

MISSION STATEMENT

The MVWDB will achieve our vision through strengthening collaboration with local businesses and job seekers. We will improve access to our dedicated workforce partners through a fully integrated One-Stop Delivery system. Decisions will be data-driven to enhance our local economies and quality of life for our communities.

VALUES

Our Board and Committee Members have a huge impact on what we do in our workforce area as well as how we do it. Those involved with the MVWDB must understand the importance of adhering to MVWDB values and professional conduct during their time working with and for the MVWDB. We accomplish this by:

- Engaging in meaningful discussions with all MVWDB stakeholders.
- Fostering continuous improvement through collaboration and evaluation of relevant data and information.
- Nurturing strong partnerships through a respectful exchange of ideas and service-oriented, transparent, integrated policies and processes.
- Keeping the needs and success of our participants and businesses as the primary focus of our work with the MVWDB.

Commented [MS1]: It was suggested by a state partner that we re-evaluate our vision statement since Governor Reynolds has determined the future ready Iowa goal has been met.

STRATEGIC GOALS

GOAL 1: FISCAL SUSTAINABILITY AND GROWTH

Leverage nonprofit status to diversify funding streams, strengthen financial sustainability, and expand reach and impact to amplify and scale resources and assistance for workforce services while simultaneously streamlining administrative processes.

Action Plan

1. Prepare Administrative Infrastructure to Increase Efficiencies and Appeal to Outside Sources

- a. Conduct a comprehensive review of organizational information on GuideStar. Update and enhance profiles to meet platinum-level requirements. Regularly monitor and update information to maintain the platinum level.
- b. Identify and evaluate grant opportunities relevant to our mission and create a centralized grant database with detailed information on potential funding sources.
- c. Create standardized language for grant applications, including mission statements, program descriptions, and impact metrics. Tailor the boilerplate for specific grant opportunities while maintaining consistency in messaging.
- d. Craft a concise and compelling elevator pitch that encapsulates the organization's mission, impact, and unique value proposition.
- e. Create a template for a compelling ask letter, detailing the organization's goals and the impact of potential contributions. Customize the ask letter for various fundraising campaigns and initiatives.
- f. Conduct a thorough analysis of existing fiscal agent services and evaluate the feasibility of bringing these services in-house. Identify the necessary resources, technology, and expertise needed for a smooth transition.

2. Develop a comprehensive fundraising plan.

- a. Integrate a user-friendly "Donate" button on the website. Ensure the button is prominently displayed and links to a secure donation platform. Implement tracking mechanisms to monitor online donations.
- b. Develop a fund development plan encompassing a variety of funding streams to support initiatives and long-term sustainability.
- c. Research available grants and corporate giving programs and set SMART goals for revenue generation across channels that align with the mission and vision of MVWDB.
- d. Identify key board members with influence and expertise in the areas relevant to corporate social responsibility (CSR) and seek their support in championing CSR initiatives.
- e. Conduct a donor mapping exercise with Board Members championing CSR initiatives and identify potential donors to cultivate relationships with through personalized communication that aims to raise awareness about MVWDB's impact in the community to increase visibility in preparation for targeted asks.

3. Scale and Sustain Success

- a. Diversify funding over the next 3 years by 30% for more flexible programs and services. Identify and pursue a minimum of five new funding streams within the next program year
- b. Track key performance indicators (KPIs) related to financial sustainability and growth.
- c. Regularly evaluate the effectiveness of fundraising strategies and make adjustments as needed.

GOAL 2: JOB QUALITY

Implement collaborative strategies that elevate the standard of job quality within the MVWA by implementing strategic initiatives that enhance satisfaction and productivity for both employers and employees.

Action Plan

1. Assessment

- a. Develop and distribute comprehensive employer and employee surveys to assess current job quality.
- b. Conduct a gap analysis based on survey responses to identify areas of opportunity that could be developed across the region to enhance existing job quality standards.
- c. Track and measure progress towards achieving goals defined and share results with stakeholders monitoring the progress of the defined strategy.

2. Collaboration and Communication Strategy

- a. Develop a comprehensive communication strategy to inform and engage the community about the job quality initiative.
- b. Organize a Job Quality Conference to share insights, best practices, and strategies.
- c. Conduct workshops for employers and employees on enhancing job quality, addressing identified areas of improvement.
- d. Compile and disseminate educational resources for businesses, including toolkits, guides, and case studies promoting job quality standards.

3. Advancing Job Quality Standards

- a. Develop a structured curriculum focusing on job quality, encompassing relevant topics, strategies, and professional development for staff.
- b. Implement training sessions to ensure effective dissemination of Job Quality curriculum.
- c. Advocate for and support the adoption of a universal standard for job quality across the region.
- d. Implement a communication strategy to showcase success stories. Develop a recognition program to identify and spotlight businesses that align with locally defined job quality principles.
- e. Expand capacity and provide advanced one-on-one support to businesses through comprehensive training for Business Services staff on Job Quality.
- f. Establish clear career pathways for employees to advance within their roles and access quality jobs.

- g. Implement a system to collect and analyze job quality data for individuals exiting the program.
- i. Use exit data to refine program strategies and improve job quality outcomes.

GOAL 3 BOARD STRATEGY

Enhance the local workforce development board's impact on the workforce system by strategically optimizing its role and fostering active engagement to effectively meet the evolving needs of our communities.

Action Plan

1. Optimize Board Impact and Effectiveness

- a. Increase board meeting efficiency and strategic focus through executive summaries and prioritizing key agenda items.
- b. Establish a process for systematically collecting cheat sheets, incorporating tools and templates from businesses to disseminate best practices.
- c. Develop a comprehensive impact measurement strategy and report template across all programs, integrating core partner reports to assess system effectiveness.
- d. Enhance committee collaboration by defining roles, training, and establishing accountability measures.

2. Foster Stakeholder Engagement and Awareness

- a. Increase board and stakeholder buy-in and system alignment through regular in-service days.
- b. Elevate board visibility and influence in the community through strategic communication and engagement initiatives.
- c. Strategically fill board vacancies, ensuring diverse and skilled representation.
- d. Strengthen community relationships through active engagement in childcare discussions and advocacy.

3. Invest in Skills Development and Recognition

- a. Implement an Award Recognition Program to acknowledge and celebrate outstanding contributions and achievements from board members and Iowa *WORKS* system staff.
- b. Develop and launch an immersive board training program to increase skills and understanding of roles and responsibilities of board members.
- c. Deliver ongoing training to ensure alignment with organizational goals and enhancing the boards ability to accomplish strategic priorities and lead a high performance workforce system
- d. Establish an extensive onboarding initiative designed to provide thorough orientation and training for board staff, ensuring a comprehensive and well-rounded introduction to their roles and responsibilities within the organization.

GOAL 4 BUSINESS SERVICES

Enhance the goals of Business Services by promoting increased integration, elevating the quality of services delivered, and mitigating employer fatigue to ensure sustained and effective support for businesses in our workforce ecosystem.

Action Plan

1. Enhance Integration and Elevate Quality of Business Services

- a. Increase engagement with Chambers of Commerce and Economic Development entities, measured by regular meetings, joint initiatives and shared data.
- b. Increase administrative efficiencies and outreach through the implementation of technological solutions.
- c. Adopt a sector-based approach, focusing on key industries, resulting in improvements in communication and understanding of employer needs.
- d. Develop and implement a standardized soft skills curriculum aligned with local employer needs that results in employers reporting increased employee satisfaction rates of new employees who have participated in the training
- e. Provide incentives or grant reimbursements for translation services for businesses to facilitate communication and understanding for refugees.
- f. Offer Windmills modules as team-building activities for leadership within businesses.
- g. Enhance labor quality through structured pre-employment training programs, employer-endorsed training programs, Incumbent Worker Training, apprenticeship, and other Work-Based Learning programs.

2. Mitigate Employer Fatigue and Streamline Work-Based Learning

- a. Simplify the Work-Based Learning engagement process by creating standardized application materials and orientations, leading to and increase in program participation.
- b. Decrease the average Work-Based Learning program registration time through improved communication and streamlined processes within one year.
- c. Reduce redundancy in Work-Based Learning programs through collaboration with other providers, measured by shared resources and elimination of duplicate programs.
- d. Increase employer awareness of Work-Based Learning's transformative impact through regular webinars and success stories, leading to growth in program participation.

GOAL 5 SYSTEM INTEGRATION

Create a unified, accessible, and customer-centered workforce system that maximizes resources and outcomes through strong collaboration and streamlined processes, resulting in a system where partners can represent each other's programs, utilizing a customer centered, one-knock approach.

Action Plan

1. Structural Alignment and Shared Vision

- a. Improve communication across all programs from leadership to front-line staff ensuring everyone is working toward the same vision and goals.
- b. Facilitate an agreement among core partners on common priorities and establish mechanisms for mutual accountability across performance measures.
- c. Conduct integration training to equip staff with the skills and knowledge needed for effective collaboration and coordination.

- d. Foster regular communication and information sharing through cross-partner meetings and a shared communication platform.
 - e. Implement leadership and staff training programs to ensure alignment with the shared vision and goals.
- 2. Streamlined and Efficient System**
- a. Reduce duplication of services by mapping and aligning partner program offerings, including the creation of a “Partner at a Glance” resource directory.
 - b. Develop standardized approach to program eligibility and referral processes.
 - c. Develop standardized forms across partners to streamline processes and facilitate seamless information sharing.
 - d. Implement integrated technology solutions for data sharing and case management (e.g., systemwide adoption of IowaWORKS).
- 3. Collaborative Partnerships and Customer-Centric Focus**
- a. Develop joint training to equip staff with knowledge of each other’s programs, to ensure that all partner staff can confidently discuss each other's programs, thereby improving access in rural counties.
 - b. Implement integrated resource teams and shared greeting systems to provide comprehensive services at a single point of entry.
 - c. Establish cross-program hiring panels to promote collaboration and diversity in recruitment.
 - d. Prioritize customer service training for all partners, emphasizing the need for positive first impressions, empathy, accessibility, and human centered design, prioritizing the language needs of customers and service for people with differing abilities.
 - e. Coordinate with community nonprofits to create an essential services hub that addresses the broader needs of job seekers.

GOAL 6 OUTREACH

Enhance the accessibility, visibility and personalized connection of Iowa*WORKS* services in rural communities by showcasing success stories, tailoring outreach, promoting and delivering impactful services to meet the needs of diverse populations.

Action Plan

- 1. Expand and Streamline Access to Services:**
- a. Develop and implement plans to expand electronic and virtual services in rural counties, ensuring equitable access to resources.
 - b. Develop the board website to include a comprehensive list of partner services, accompanied by a self-referral form routed to the appropriate program for streamlined access.
 - c. Provide targeted digital literacy training in rural communities.
 - d. Partner with local libraries and community centers to offer internet access and support.
- 2. Elevate Visibility and Value Proposition**

- a. Increase the visibility of programs and services within the community by crafting a clearly defined value proposition that articulates the benefits and impact of the initiatives.
 - b. Utilize multiple communication channels for outreach, including local media, social media and printed materials.
 - c. Organize community events and workshops showcasing program offerings and success stories.
- 3. Personalize Outreach and Connection**
- a. Conduct data-driven analysis to identify and understand the needs of diverse populations.
 - b. Establish stakeholder groups and specialized outreach teams targeting specific demographics.
 - c. Develop culturally-sensitive and tailored outreach message for each target population.
 - d. Feature diverse success stories that resonate with specific communities by showcasing success stories of individuals who choose to remain and thrive after graduating, emphasizing their journey of pursuing passion and skills.
- 4. Showcase Career Pathways and Success**
- a. Develop and promote clear career pathways showcasing high-demand jobs in rural areas.
 - b. Feature success stories highlighting individuals who found thriving careers through IowaWORKS services.
- 5. Measure and Refine Efforts**
- a. Conduct regular marketing and outreach reviews to assess the effectiveness of outreach efforts.
 - b. Refine messaging and channels based on data-driven insights.
 - c. Implement and track ROI calculations for all marketing and outreach activities.

GOAL 7 YOUTH SERVICES

Amplify our impact and commitment by significantly elevating the availability and quality of our youth services, while positively increasing the quality of youth for employment.

Action Plan

- 1. Increase Youth Participation and Engagement**
- a. Increase youth program enrollment by implementing targeted outreach campaigns aligning with youth aspirations and showcasing success stories that highlight the role of Accelerate Iowa in their success.
 - b. Communicate with youth through their preferred platforms, employing text campaigns for increased engagement.
 - c. Secure Work-Based Learning intermediary status for high schools to streamline access to programs and simplify procedures.
 - d. Develop and implement a comprehensive parent engagement strategy, reaching parents and families with information about post-high school opportunities.

- e. Adapt enrollment and placement processes to meet youth where they are, emphasizing consistent presence and relationship development.
- f. Launch a career exploration program for younger youth to expand awareness of diverse career options.

2. Enhance Youth Skill Development and Workforce Preparedness

- a. Increase youth placement rates in quality jobs through enhanced enrollment and placement processes, focusing on relationship building and continuous support.
- b. Maximize the use of innovative technology, such as VR-based learning modules to enhance engagement and career exploration efforts.
- c. Increase participation in Registered Apprenticeship through targeted outreach and partnership building with relevant industries.
- d. Expand youth mentoring programs, providing additional support and guidance for career navigation.

3. Continuously Measure and Improve Program Effectiveness

- a. Develop and implement a comprehensive feedback system across all program touchpoints to gather data on youth satisfaction, program effectiveness and areas of improvement.
- b. Analyze feedback data quarterly and implement program adjustments based on findings.
- c. Publish reports highlighting program achievements, youth success stories and areas of progress towards strategic goals.

GOAL 1: FISCAL SUSTAINABILITY AND GROWTH

Leverage nonprofit status to diversify funding streams, strengthen financial sustainability, and expand reach and impact to amplify and scale resources and assistance for workforce services while simultaneously streamlining administrative processes.

Owner
Total Budget
Committee

Action Plan	Parties Involved	Budget	Begin date	End Date	Performance Metrics	Status
1. Prepare Administrative Infrastructure to Increase Efficiencies and Appeal to Outside Sources						
<p>a. Conduct a comprehensive review of organizational information on GuideStar. Update and enhance profiles to meet platinum-level requirements. Regularly monitor and update information to maintain the platinum level.</p> <p>b. Identify and evaluate grant opportunities relevant to our mission and create a centralized grant database with detailed information on potential funding sources.</p> <p>c. Create standardized language for grant applications, including mission statements, program descriptions, and impact metrics. Tailor the boilerplate for specific grant opportunities while maintaining consistency in messaging.</p> <p>d. Craft a concise and compelling elevator pitch that encapsulates the organization's mission, impact, and unique value proposition.</p> <p>e. Create a template for a compelling ask letter, detailing the organization's goals and the impact of potential contributions. Customize the ask letter for various fundraising campaigns and initiatives.</p> <p>Conduct a thorough analysis of existing fiscal agent services and evaluate the feasibility of bringing these services in-house. Identify the necessary resources, technology, and expertise needed for a smooth transition .</p>						
2. Develop a comprehensive fundraising plan.						
<p>a. Develop a fund development plan encompassing a variety of funding streams to support initiatives and long-term sustainability.</p> <p>b. Integrate a user-friendly "Donate" button on the website. Ensure the button is prominently displayed and links to a secure donation platform. Implement tracking mechanisms to monitor online donations.</p> <p>c. Research available grants and corporate giving programs and set SMART goals for revenue generation across channels that align with the mission and vision of MVWDB.</p> <p>d. Identify key board members with influence and expertise in the areas relevant to corporate social responsibility (CSR) and seek their support in championing CSR initiatives.</p> <p>e. Conduct a donor mapping exercise with Board Members championing CSR initiatives and identify potential donors to cultivate relationships with through personalized communication that aims to raise awareness about MVWDB's impact in the community to increase visibility in preparation for targeted asks.</p>						
3. Scale and Sustain Success						
<p>a. Diversify funding over the next 3 years by 30% for more flexible programs and services. Identify and pursue a minimum of five new funding streams within the next program year</p> <p>b. Track key performance indicators (KPIs) related to financial sustainability and growth.</p> <p>c. Regularly evaluate the effectiveness of fundraising strategies and make adjustments as needed.</p> <p>d. Share impact stories and testimonials to demonstrate the value to the fund development strategy.</p>						

Adult/DW RFP Committee Recommendation

Documents Included: None

Reason: The RFP closed on February 14th, the RFP committee's met and scored the proposals and have prepared their recommendation for the full board.

Action Requested: Approve RFP committee's recommendation.

Youth RFP Committee Recommendation

Documents Included: None

Reason: The RFP closed on February 14th, the RFP committee's met and scored the proposals and have prepared their recommendation for the full board.

Action Requested: Approve RFP committee's recommendation.

One Stop Operator RFP Committee Recommendation

Documents Included: None

Reason: The RFP closed on February 14th, the RFP committee's met and scored the proposals and have prepared their recommendation for the full board.

Action Requested: Approve RFP committee's recommendation

Travel Policy Modification

Documents Included: Travel policy with highlighted changes.

Reason: To ensure that individuals have the flexibility to cover the cost of meals when traveling to more expensive areas and allows a per diem to streamline reimbursements and processing. Changes discussed at the executive committee meeting.

Action Requested: Approve modifications



Mississippi Valley Workforce Development Board

Travel Policy

Approved: September 27, 2021

Effective Date: September 27, 2021

Amended Date: July 12, 2022

A. Purpose

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

B. Background

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

1. It is the policy of the MVWDB to reimburse 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

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 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 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.

E. Mode of Travel

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

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/private-owned-vehicle-pov-mileage-reimbursement-rates>.
4. A Google map showing actual miles must be submitted with the travel reimbursement form.

G. Lodging

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 and Incidentals

1. The costs of meals and incidentals 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 M&I incidental to the cost of meetings and conferences where the primary purpose is the dissemination of technical information.
 - b. Costs of M&I 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.

Per Diem Rates

A per diem allowance will be used for meals and incidentals. Meals and incidental costs should not be put on a board credit card during travel.

The General Services Administration establishes per diem rates for destinations within the lower 48 Continental United States. Per diem rates during overnight travel will be calculated by using the city/state/zip search at <https://www.gsa.gov/travel/plan-book/per-diem-rates>. The MVWDB utilizes the per diem rates from this website to determine reimbursement rates. It does not follow all per diem policies stated on this site. The per-diem rates are inclusive of tax and tip; no separate tip reimbursements will be made. For the first and last day of travel 75% of the per diem rate will be reimbursed.

Meals provided at hotel (such as breakfast) or at the conference will be subtracted from the per diem rate identified per meal (breakfast, lunch or dinner). If a continental breakfast is included with the cost of a hotel stay, it will count as the breakfast for that day and a separate per diem will not be reimbursed for that meal. For meals provided as part of a conference/meeting/etc., a separate per diem for those meals will not be provided unless there is a dietary restriction that cannot be accommodated by the venue. Unless specifically noted in the hotel and/or conference materials, the assumption will be made that breakfast will be provided by the hotel and lunch will be provided for conference events. If that ends up not occurring, the appropriate per diems can be added in when completing the Travel Expense Report. No receipts are required. If the actual cost of the meal exceeds the reimbursement amount, the difference is not reimbursed.

The specific meals to be reimbursed will be determined at the time of planning the travel details. M&I expenses will be reimbursed on the travel expense form following the completion of travel.

Daily Travel

Out of town travel that last for more than 4 hours will be reimbursed per meal following the following conditions:

- Travel that starts after 7:00 am will not be reimbursed for breakfast
- travel that ends by 12:00 pm will not be reimbursed for lunch;
- and travel that ends before 6:00 pm will not be reimbursed for dinner.

I. Miscellaneous Reimbursements:

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.

Commented [MS1]: feel these are covered in the following section

J. Credit Card Usage

- 1. MVWDB staff have the authority to use the MVWDB credit card while on business travel **except for meals** 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 **or designee** 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

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, **time**, 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 **except meals** 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

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

- 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

- 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	
Origin	
Destination	

Date of Departure	Date of Return	Time of Departure	Time of Return	Purpose of Travel

Expenses (All expenses must be accompanied by itemized receipts except M&I)

Reimbursements

Expense Type	# of Receipts	Amount
Meals and Incidentals		
Mileage (\$0.67 per mile)		
Transportation		
Lodging		
Flights/Baggage		
Miscellaneous (Specify)		
Total		

I hereby certify that the above expenditures represent actual expenses (cash spent) for legitimate MVWDB business only and include no items of a personal nature. Falsification of this document is subject to disciplinary action, up to and including termination of employment.

Employee Signature _____ Date: _____

Executive Director/Board Chair Approve Not Approved

Signature: _____ Date: _____

Additional Comments:

Individual Training Account Policy Modification

Documents Included: Individual Training Account policy with highlighted changes.

Reason: To increase the ITA limit to \$6,000 due to increasing tuition costs. Recommendation from Operations Committee.

Action Requested: Approve modifications



Individual Training Account (ITA) Policy

Approved Date: January 25, 2021

Effective Date: July 1, 2020

Amended Date: N/A

A. Purpose

1. This policy outlines the Mississippi Valley Workforce Development Board (MVWDB) directives for providing Individual Training Accounts (ITA) for WIOA eligible Adult, Dislocated Worker and Youth participants.

B. Background

2. WIOA Title I-B training services for WIOA eligible Adults, Dislocated Workers and Youth are provided through ITA. Using ITA funds, WIOA eligible Adults, Dislocated Workers and Youth purchase training services from eligible training providers they select in consultation with a Career Navigator.
3. Participants are expected to utilize information such as skills assessments, labor market conditions/trends, and training providers' performance, and to take an active role in managing their employment future through the use of ITA.

C. Policy

1. ITA are one training option available to eligible and appropriate participants when it is determined by a Career Navigator that they will be unlikely or unable to obtain or retain employment that leads to self-sufficiency or higher wages from previous employment through career services alone.
2. An ITA is limited in cost and duration and must result in employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment.
3. ITA are not entitlements and shall be provided to eligible participants on the basis of an individualized assessment of the person's job readiness, employment and training needs, financial, social and supportive needs, labor market demand and potential for successful completion, as documented on the participant's Individual Employment Plan (IEP).
4. Participants choose career training with Eligible Training Providers in consultation with Career Navigators.
5. In order to enhance consumer choice in education and training plans, as well as to provide flexibility to service providers, youth program-funded ITA may be used for out-of-school youth (OSY) ages 16-24, when appropriate.
 - a. In-school youth (ISY) cannot use youth program-funded ITA.
 - b. However, ISY between the ages of 18 and 21 may co-enroll in the adult program and

receive training services through an adult program funded ITA.

6. ITA Funding for Training is Limited to Participants Who:
 - a. Complete an assessment and an IEP that identifies the selected training course;
 - b. Are unable to obtain grant assistance from other sources to pay the costs of training or require assistance beyond available grant resources from other sources, such as Pell Grants in order to complete their training goals;
 - c. Select training programs that are directly linked to an in-demand industry sector or occupation or sectors that have a high potential of sustained demand or growth in the local area or in another area in which the participant is willing to travel or relocate [WIOA Section 134(c)(3)(G)(iii)]; and
 - d. Maintain satisfactory progress/grades throughout the training program.

D. Coordination of WIOA Training Funds

1. WIOA funds are intended to provide training services in instances when there is no grant assistance, or insufficient assistance from other sources such as, but not limited to:
 - a. Temporary Assistance for Needy Families (TANF),
 - b. Federal Pell Grants,
 - c. Academic Competitiveness Grants,
 - d. National SMART Grants,
 - e. Federal Supplemental Educational Opportunity Grants, or
 - f. Federal Work-Study,
 - g. GI Bill or other Federal financial aid available to military veterans, and
 - h. state-funded grants.
2. A WIOA Title I participant may enroll in WIOA Title I-funded training while his/her application for a Pell Grant is pending as long as the service provider has made arrangements with the training provider and the WIOA Title I participant regarding allocation of the Pell Grant, if it is subsequently awarded.
 - a. In that case, the training provider must reimburse the service provider the WIOA Title I funds used to underwrite the training for the amount the Pell Grant covers, including any education fees the training provider charges to attend training.
 - b. Reimbursement is not required from the portion of Pell Grant assistance disbursed to the WIOA Title I participant for education-related expenses.
3. An individual may select training that costs more than the \$5,500 WIOA maximum amount when other sources of funds are available to supplement the ITA.
4. Career Navigators must consider and document in the participant file the availability of other sources of grants, excluding loans, to pay for training costs so that WIOA funds are used to supplement but not supplant other sources.
5. The use of WIOA funds to make payments towards a personal loan of an otherwise eligible participant is prohibited. However, the mere existence of a federal loan, regardless of the status, must not impact ITA eligibility determinations.

E. ITA Authorization

1. ITA must be approved by a WIOA Program Manager prior to issuance. ITA are authorized only for training programs listed on the Eligible Training Provider List (ETPL), as required in WIOA Section 134(c)(F)(iii).
2. ITA funds are paid directly to the training provider.
3. ITA may be used for pre-apprenticeship programs however, only pre-apprenticeship programs listed on the ETPL may be approved. (20 CFR 680.330)
4. ITA may be authorized for training programs in other states or online training if the training program is listed on the ETPL list or there exists reciprocity agreements with other states.
5. ITA are not authorized for individualized career services such as short-term prevocational training.
 - a. Short-term prevocational services may include the development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, professional conduct, or other non-occupation-specific topics that are intended to prepare individuals for unsubsidized employment or training and should not exceed 40 hours of instruction except in documented special circumstances.

F. ITA Funding Limit

1. The limit for ITA contracts is \$5500 per program year.
 - a. A waiver can be submitted to the MVWDB executive director to exceed this limit by \$1,000.
 - b. Documentation of the MVWDB executive director approval authorizing the ITA increase must be included in case notes located in the Iowa *WORKS* case management system.
 - c. A waiver with supporting documentation can also be submitted to the MVWDB executive director for a class to be retaken and will be considered on a case-by-case basis.
 - d. Refresher courses are not considered retake classes and are eligible to be paid for out of Title I funds.
2. The maximum ITA limit is not an entitlement. The amount and duration of each participant's ITA award is determined on an individual basis. Funding amounts will take into account the total costs of the selected training program, any other financial assistance available to the participant, and the WIOA funding available to the Adult, Dislocated Worker or Youth Programs.

Commented [MS1]: The recommendation is to increase this to \$6,000

G. ITA Continued Funding

1. Continued funding of an ITA is contingent on availability of WIOA funds and on the participant's satisfactory progress in school. Career Navigators will review the participant's training progress and expenses quarterly or more frequently depending on the training institution's schedule. An individual's progress will be considered satisfactory upon earning:
 - a. A grade point average that does not fall below 2.0 for two consecutive terms; or
 - b. A grade point average sufficient to graduate from, or receive certification in, the individual's approved area of study; or

- c. Sufficient credit hours to finish the approved course of study within the timeframe established under the approved training plan.
 - d. In the case of self-paced or ungraded learning programs, satisfactory progress means participating in classes and passing certification examinations within the timeframe established under the approved training plan.
 - e. Career Navigators must arrange to receive training progress reports (i.e., transcripts) from participants in adequate time to process the subsequent tuition payment.
2. Career Navigators must develop with participants who are not earning satisfactory progress in their coursework, a service strategy to overcome the barriers impacting progress. WIOA ITA funding may be terminated if participants do not earn satisfactory progress for two (2) or more consecutive school terms (i.e., quarters, semesters, etc.).

H. ITA Modifications

1. An ITA may be modified to ensure the individual attains their educational goals and subsequent employment. In some circumstances, such as when a program of training is removed from the ETPL, or when extraordinary program expenses develop, the participant and career planner must agree on whether to complete the plan of training with the existing provider, seek a similar program, or discontinue training.
2. When a program of training is removed from the state ETPL, WIOA participants in that program can complete their training but WIOA funds cannot be used. However, an ITA should not be modified or extended for a participant beyond the original plan approval as it relates to a program of training that is no longer on the ETPL.
3. Any modifications to the ITA should be documented in case notes located in the Iowa*WORKS* case management system.

I. ITA Obligations

1. In order to obligate ITA funds a Purchase Order may be written for individuals identified to receive an ITA award.
 - a. The obligation would document a three-way commitment between the individual, the service provider, and the training institution.
 - b. MVWDB retains the flexibility to decide when to bill actual expenditures with the training provider.
2. Payments from ITA may be made in a variety of ways, including the electronic transfer of funds through financial institutions, vouchers, or other appropriate methods.
3. Payments also may be made incrementally, for example, through payment of a portion of the costs at different points in the training course.

J. Recovery of Tuition Funds

1. In the event a participant discontinues training, the Career Navigator must do due diligence to ensure the recovery of WIOA funds provided to training institutions. Career Navigators must verify the following:
 - a. The refund policy of the training provider for early termination from the training

- program;
- b. A requirement for the training provider to notify the case manager of early customer dropout;
 - c. The percentage of the advanced payment to be returned;
 - d. Turnaround timeframe for the refund;
 - e. Time spent in training before a refund will no longer be honored.

K. Participant File Documentation

1. Justification for, and continued funding of an ITA must be supported by the following documentation uploaded to the participant file and/or in case notes entered in IowaWORKS:
 - a. Assessment results supporting the selected program of study. The assessment must support the need for training including a determination by a Career Navigator that the participant will be unlikely or unable to obtain or retain employment that leads to self-sufficiency or higher wages from previous employment through career services alone; and that the selected program of study will result in employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment;
 - b. Completed IEP documenting the selected program of study, anticipated and actual start/end dates and training outcomes;
 - c. Eligibility for other training grant funding;
 - d. Verification of FAFSA application and award status, if applicable;
 - e. Authorization of the ITA and any approved increase or modification;
 - f. Documentation of the participant's willingness and ability to travel to locations outside of MVWA counties if the selected training program and/or demand occupation is outside of the MVWA service area.
 - g. Case note documenting that the training provider is on the ETPL; and
 - h. Documentation of the participant's progress and/or grades.

L. Training Contract Exception

1. ITA are the primary method to be used for procuring training services under WIOA. However, in certain circumstances, a training contract may be used to provide training services, instead of an ITA.

M. Exceptions

1. Per Board policy, contracts for services may be used in place of ITA when one or more of the following exceptions apply and consumer choice requirements have been fulfilled:
 - a. <https://www.youtube.com/watch?v=MpuYQM3TYFU> On-the-job training, which may include paying for the on-the-job training portion of a Registered Apprenticeship program, customized training, incumbent worker training, or transitional jobs.
 - b. If the MVWDB determines that there are an insufficient number of Eligible Training Providers in the local area to accomplish the purpose of a system of ITA. This

determination process must include a public comment period of at least 30 days for interested providers and must be described in the local plan.

- c. To use a training services program of demonstrated effectiveness offered in a local area by a community-based organization or other private organization to serve individuals with barriers to employment the MVWDB will look at the following criteria:
- d. Financial stability of the organization.
- e. Demonstrated performance in the delivery of services to individuals with barriers to employment through such means as program completion rate; attainment of the skills, certificates, or degrees the program is designed to provide; placement after training in unsubsidized employment, and retention in employment.
- f. How the specific program relates to the workforce investment needs identified in the local plan.
- g. If the MVWDB determines that the most appropriate training could be provided by an institution of higher education or other provider of training services in order to facilitate the training of multiple individuals in in-demand industry sectors or occupations. This is true provided that the contract does not limit consumer choice.
- h. If the MVWDB determines a pay-for-performance contract is suitable. No more than 10 percent of the local funds may be spent on pay-for performance contract strategies.
- i. The MVWDB may determine that providing training through a combination of ITA and contracts is the most effective approach. This approach could be used to support placing participants in programs such as Registered Apprenticeships and other similar types of training.

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

Board Staff Updates



Mississippi Valley Workforce Development Board

Board Staff Report

Prepared for February 26th, 2024, Full Board Meeting

Updates

- Memorandum of Understanding and Infrastructure Funding Agreement
- Workforce Communities of Action
- Family and Worker Fund Funding Request
- PY24 Funding Allocation
- Iowa*WORKS* Mobile Unit
- One Stop Operator Monitoring
- NAWB Presentations
- Phalanx
- Job Quality Academy
- Refugee Events
- Competency Models

Upcoming Activities

- April 4-5 Iowa Workforce Development is holding the statewide Sector Partnership training
- Be on the look out for a survey to start planning our June board training
- We will also be sending out polls on preferences for meeting frequency, time and structure for the upcoming program year