

# PARTNER WORK

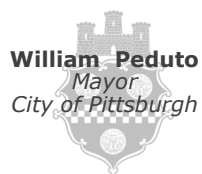
The Workforce Development Board for the Pittsburgh Area



*Building a thriving workforce for the Pittsburgh region.*

Board of Directors' Briefing Book

**S e p t e m b e r 2 7 , 2 0 1 9**



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*Chair*



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

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 Service Employees International  
 Union

# PARTNER4WORK (P4W) Board of Directors' Meeting

8:30 to 10 a.m. September 27, 2019

Rivers Club, One Oxford Centre, 301 Grant Street, Suite 411, Pittsburgh, PA 15219

1. Welcome and call to order *Dave Malone, Chair*
  
2. Chairman's Report and Consent Agenda *Dave Malone*  
**APPROVE: Minutes from June 21, 2019 (page 8)**  
**APPROVE: Modifications to the Regional and Local Workforce Development Plans (summary of modifications are included on page 13)**  
**ACKNOWLEDGE: The actions of the Executive Committee since the last full board meeting.**
  - Approve policy changes as recommended by the Service Delivery Committee (summary and chart begin on page 15).
  - Approve a \$550,000 contract award to EDSI for the Work Ready Program from Oct. 1, 2019, to Sept. 30, 2020, with the option to renew for three additional years at the discretion of P4W.
  - Approve a \$164,200 contract award to Point Park University to serve between 50-75 TANF eligible students in PY19-20, with an option to renew for three additional years at the discretion of P4W.
  - Approve a \$149,400 contract award to Keep it Simple to build capacity in developing and sustaining Industry Partnerships in targeted sectors.
  - Approve a \$400,000 contract award to Midwest Urban Strategies to oversee Partner4Work's Federal Grant portfolio directly connected to a multi-city consortium for the period of August 1, 2019, through September 30, 2020.
  
3. Committee reports
  - I. Fiscal and Operations *Lisa Kuzma, Treasurer*  
**APPROVE: Extend the contract for audit and tax services with Schneider Downs & Co. for one year**
  - II. Governance *Debra Caplan, Chair*
  - III. Learn & Earn *Debra Caplan and Majestic Lane*
  
4. Discussion of Signature Programs and Accomplishments
  - PNC's PartnerUp® (*Cat McLaughlin, PNC*)
  - BankWork\$ Pittsburgh and Early Childhood Education (*Mark Rendulic, Citizens Bank; Carey Harris, Literacy Pittsburgh*)
  - Post-Secondary Connector with Community College of Allegheny County and Point Park University (*Dr. Quintin Bullock, Community College of Allegheny County*)
  - Workforce clearinghouse model with the Pittsburgh Penguins, Builders Guild, and SEIU32BJ (*Kevin Acklin, Pittsburgh Penguins; Jeff Nobers, Builders Guild; Sam Williamson, SEIU32BJ*)
  
5. Other Board Business and Discussion
  
6. Open forum and Public Comment Period  
*Individual speakers limited to three (3) minutes*
  
7. Adjournment

## **PARTNER4WORK INTERMEDIATE STRATEGIC PLAN**

In December 2018, the Partner4Work (P4W) Board of Directors unanimously approved an intermediate strategic plan as presented by the P4W Transition Committee, a group of board members and stakeholders assembled to determine a new business model to achieve central objectives under the direction of new CEO Earl Buford.

The intermediate strategic plan focuses on three interrelated goals: addressing employer and industry needs; meeting the needs of job seekers, workers, and youth; and strategic system coordination. Themes around increasing visibility and communications and the reallocation of funds are woven throughout the plan; however, key items include:

### **Addressing employer and industry need by providing a pipeline of talent**

- The establishment of an employer-driven industry engagement model (strategic industry advisory councils/industry partnerships) to drive programmatic decision-making, the allocation of resources, and a strategic business services model that meets employers' needs in finding and retaining talent.
- The development of strong leader-to-leader relationships with employers, employer organizations, associations and affiliations, the Allegheny Conference, unions and labor-management agencies, public officials, K-12 and post-secondary learning institutions, and others; leverage Board expertise and networks.

### **Service delivery that meets the needs of job seekers, workers, and youth**

- The engagement of industry partnerships to define career pathways and identifying the partners, resources, and services (wrap-around services) needed for youth, job seekers, and workers to begin or advance on a career pathway in a high-priority industry.

### **Strengthen system coordination to support business services and service delivery**

- The development of a coordination council to support industry partnerships and service delivery.
- The re-establishment of a funding collaborative to infuse the system with additional resources to build capacity and support the new business model.

In approving the intermediate strategic plan, the Board and Transition Committee agreed to make connections, open doors, and champion Partner4Work's implementation of the new employer-driven industry engagement and business services model and other strategic objectives.

**In addition, the Board agreed to several bold next steps in achieving the intermediate strategic plan. Those steps, and the progress achieved to date, begin on the next page.**

## INTERMEDIATE STRATEGIC PLAN SCORECARD

### Restructure the organization by reallocating budgeted funds to support the new business model

#### On Target

- Industry partnerships operationalized with significant momentum in Construction, Education, Financial Services, and Transportation & Logistics.
- Two signature industry-led programs launched (BankWork\$ and relaunched Intro to the Trades program) with an up-front guarantee of job placement or interview. Another signature program in the advanced planning stages (Early Childhood Education Registered Apprenticeship).
- High-level consultants engaged to enhance the delivery of strategic business solutions across P4W's provider footprint, including PA CareerLink, and to develop, and execute strategies for Industry Partnerships in Manufacturing, Healthcare, Information Technology, Retail and Hospitality, and Public Sector. Sector-specific consultants also to be engaged.

### Develop a new funding model, which includes a funding collaborative, to achieve these objectives.

#### On Target

- On target with a local funding collaborative established with R.K. Mellon, Heinz Endowments, Hillman Foundation, Benedum Foundation, and The Pittsburgh Foundation.
- National Fund for Workforce Solutions re-establishes Pittsburgh as a funding collaborative city; awards a \$50,000 planning grant.
- Several financial institutions pledge support of BankWork\$.
- Overall private funding influx potential of \$550,000.

### Ownership and advocacy of these changes by the Board of Directors is a critical factor for success.

#### On Target

- Refined and enhanced training policies to be more business-friendly and piloted a reverse-referral process to streamline training participant enrollment.

### Creation of the staff of detailed plans and reporting mechanisms for the Board and its committees.

#### Opportunity Area

- This work is in progress with dashboards/scorecards in development.
- New program management and grant management technologies being implemented for real-time information on outputs and outcomes.

### Use of research, data, and outcomes as a fundamental driver of the organization's direction, for continuous improvement, and as the starting point for strategies to work with job seekers, workers, and employers on equity, inclusion, and diversity, in particular.

#### On Target

- In addition to labor market insights and workforce trends, P4W receives real-time, on-the-ground career pathway information from employers engaged in industry partnerships.

### Pursue leadership role in national, state and local workforce development efforts.

#### On Target

- P4W has elevated its position on a local, state, and national scale as a key member of the Pittsburgh Regional Alliance Search Committee and Transition Committee; Allegheny Conference on Community Development Workforce Committee; Pennsylvania Workforce Development Association; National Skills

Coalition, National Fund for Workforce Solutions; national Community College Working Group; Federal Communication Commission's Broadband Workgroup; US Conference of US Mayors; Workforce and Racial Equity Advisory Committee.

**Communicate the business and service delivery model to employers and the community-at-large.**

**On Target**

- P4W communicates and raises the visibility of the new business and service delivery model. Recent examples of local and national engagements include: African-American Chamber of Commerce, Carnegie Mellon University, Healthcare Council of Western PA, community forums with Pittsburgh Black Elected Officials Coalition, German American Chamber of Commerce, Pittsburgh Human Resources Association, Lower Hill Redevelopment public hearings with the Pittsburgh Penguins and developers, International Foundation of Employee Benefit Funds, US Conference of Mayors Workforce Development Council, National Fund for Workforce Solutions, National Skills Coalition, American Public Human Services Association/American Association of SNAP Directors.

**Areas of Opportunity for Board Engagement**

- Leadership and supports needed to build industry partnerships in Healthcare, IT, Retail & Hospitality, and Manufacturing.
- Invest in additional industry-driven training with guaranteed or preferred hire links.
- Continue to leverage private funding to help providers build capacity to more effectively serve job seekers and respond to industry demands.
- Corporate Commitment for 2020 Learn & Earn program.
- Advocate for P4W access to wage record data and the ability to share data between key partners (i.e. Allegheny County DHS).
- Develop a shared definition of work readiness to ensure job seekers are prepared to meet the needs of businesses.

## MEETING MATERIALS

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

Partner4Work, 650 Smithfield Street, Suite 2600, Pittsburgh PA 15222

8:30 a.m. June 21, 2019

**Board Members Present**

Allen, Will (phone)  
Barcaskey, Rich  
Belechak, Joe (phone)  
Bell, Natalie  
Bullock, Dr. Quintin  
Camino, Chris  
Caplan, Debra  
Cherna, Marc  
Cooper, Mary Frances  
Coplan, Dave  
Dugan, Ann (phone)  
Ellsworth, Laura  
Katona, Marci (phone)  
Kuzma, Lisa  
Malone, Dave  
Massaro, Steve  
McLaughlin, Cat  
Pipitone, Scott  
Pollard, Josh (phone)  
Rendulic, Mark  
Staszko, Frank  
Thomas, John (phone)  
Trybus, Jessica

**Board Members Absent**

Ferraro, Melissa  
Gittlen, Ike  
Harris, Carey  
Kelly, Darrin  
Lane, Majestic  
Melcher, Tom  
Mendoza, Brandon  
Nobers, Jeff  
Powers, Beth  
Washington, Dr. Nancy  
Williamson, Sam

**Guests Present**

Bernhardt, Chris (Grant Associates)  
Day, Michelle (ResCare)  
Gbee, Phillip (Grant Associates)  
Killmeyer, Deb (CCAC)  
Leisten, Terri (Dynamic Workforce Solutions)  
Mills, Jack (Smart Future Strategy)  
Nestor, Jennifer (Labor and Industry, Oversight Services)

**Staff Present**

Buford, Earl  
Carey, Tracey  
Ford, Carolyn  
Herron, Ray  
Martino, McCrae  
Moore, Dillon  
Mosley, Franklin  
Pajewski, Jennifer  
Petrillo, Nathan  
Puskar, Susie  
Saulle, Laura  
Smith, Andy



## Board Meeting Minutes (continued)

Chair Dave Malone called the meeting to order at 8:31 a.m. and welcomed new Board members and guests.

Before general business, P4W Governance Chair Debra Caplan recognized Secretary Jessica Trybus of Simcoach Games, longtime Partner4Work Board, and Committee member, who announced her resignation at the end of June. Among other things, Ms. Trybus is credited with leading the Service Delivery Committee and serving on the Branding Committee and CEO Search Committee. She also served as P4W's voice on the state workforce board.

In brief remarks, Ms. Trybus remarked on her tenure and expressed her appreciation for the contributions of Learn & Earn interns who developed the JobPro series, a game still highly downloaded and used today.

As his first full meeting as Chair, Mr. Malone set his expectations for the months ahead. Specifically, he commented on his long involvement with Partner4Work and workforce development efforts overall. He added that while the work has been ongoing for many years, little has been accomplished to date. Partner4Work and workforce development overall are crucial for the community given the challenges businesses have or expect to have in hiring. He pointed to a number of opportunities to effect change including engagement with and opportunities to improve the school system and defining the overlaps with the Allegheny Conference and serving as its workforce arm.

Mr. Malone lauded CEO Earl Buford's experience in working with the business community and efforts to focus on business leaders locally in a way not done before. Through that focus and engagement, P4W can help create a systemic culture within the region.

## CHAIRMAN'S REPORT AND CONSENT AGENDA

Mr. Malone took roll, announced a quorum present, and the receipt of three proxy ballots approving all action items.

Minutes from April 5, 2019, and June 7, 2019, were considered for consent approval.

**On a motion by Deb Caplan, seconded by Dave Coplan, the minutes were approved by unanimous vote.**

## COMMITTEE REPORTS

### **Audit/Finance Committee and Operations**

Treasurer Lisa Kuzma introduced new board and committee member John Thomas, thanked Beth Powers and member-at-large Terry Kiliany for ongoing participation, and asked for new members for the Finance Committee; Mark Rendulic of Citizens Bank volunteered for membership. Other items of note and discussed:

- Most of P4W's funding is restricted.
- Changes in formula funding. As the unemployment rate drops, public funding decreases, and is reflected in the proposed budget
- Anticipated changes in TANF funding are expected next year as PA DHS will issue an RFP for funds historically grandfathered to local areas. While this will present a \$4 million impact on the budget, it also presents an opportunity as P4W could partner with the City and other regional WDBs to bring additional resources to the region.

CFO Ray Herron informed the group that the financial statements for the third quarter were posted in the Board portal. Items of note:

- Accounts receivable were higher than last year.
- Spending increased in March. We receive provider invoices, draw the funds, and pay providers once funding is received. P4W is on budget.
- Salary, wages, and benefits were lower than expected as hiring occurred more slowly than expected.

- P4W will review financial statements and change the way information is reported, breaking up statement of activities based on programs.
- The 2019-2020 budget includes a \$4 million increase from the previous year. Overall program increases are attributed to the Dislocated Worker Grant with Midwest Urban Strategies (\$1.5 million stays local). Other areas declined. Allegheny County WIOA decreased \$1.2 million, and the city is even or a slight increase.
- TANF (EARN and youth) were a slight increase. P4W will spend performance dollars, earned when the county managed TANF.
- Other program dollars include the DOL ex-offender grant, PA Smart grants, Business Education Partnership, and Teacher in the Workplace.
- The Learn & Earn line item was adjusted as Allegheny County will contract directly with two primary providers
- Expenses that have changed include direct program expenses and salaries, wages, and benefits connected to building the infrastructure needed to support the new business model (\$750,000 increase).
- Other expenses are related to IT services to transition to cloud-based license solutions, outcomes systems, and grant, project, and contact management systems. A new contract database and the Blackbaud financial system will be live September 1, 2019.

**On a motion by Dr. Quintin Bullock, seconded by Scott Pipitone, the budget for the fiscal year ending June 30, 2020, was approved by unanimous vote.**

### **SERVICE DELIVERY**

Chief Program Officer McCrae Martino offered the Service Delivery and Youth Advisory reports. She reiterated that late June was an important time for P4W as the transition from United Labor Agency to two Title I providers (Dynamic Workforce Solutions Downtown and Grant Associates in Forest Hills) will be final on July 1. In addition, ResCare Workforce Solutions will become the one-stop operator as of July 1. Grant Associates also would become the EARN provider at Hosanna House.

Although there is significant change, the transition appeared to be going as smoothly as possible. Of the 31 CareerLink (ULA) staff, 26 applied for positions with the new providers, 20 were offered positions, and 17 accepted positions. Six individuals were not offered positions with the new contractors. Ms. Martino said that given the transition, a reduction in services should be expected on July 1 as the new contractors onboard.

Also in transition are the youth contractors. P4W voted to contract with 17 youth providers, seven of whom are new to this work. Ms. Martino said reporting on that transition would take place at future meetings.

As a part of the youth conversation, Cat McLaughlin of PNC and the board discussed the PartnerUp® program and a super hiring day. PNC, AHN, Comcast and Peoples work to hire graduating seniors for positions such as teller, call center. The program includes tuition benefit with CCAC. The group discussed connecting with young people who are not college bound and might not be sure of future plans with real job opportunities. Schools have been critical in helping to source young candidates.

### **Learn & Earn and Governance**

Chair Debra Caplan opened her report with an acknowledgment of Majestic Lane for helping to usher the Learn & Earn MOU through the proper city channels. In addition, Ms. Caplan reported:

- City funding for Learn & Earn was approved in the spring and the MOU was with the County and City for execution.

- Orientation for providers was held the week of June 17, and more than 1,800 young people were expected to begin work on June 24.
- 55 Corporate interns would work with 21 businesses during the summer. These corporate interns represent 27 colleges and universities including several Historically Black Colleges and Universities.

In moving onto to Governance, Ms. Caplan announced an orientation session planned for July 23 at the Koppers Building. While the session would be held primarily for new board members, all members were encouraged to attend a special inter-generational communications workshop with experts Denise Thomas and Ian Abston of Milwaukee, planned for the same day.

Ms. Caplan also reminded that the Governance Committee plans to review the current committee structure and bylaws, recommend changes, and issue the Board Self-Assessment survey by year's end. She concluded her report with an update on work with the state on Board Composition certification. Labor and Industry's Oversight Services reviewed P4W's board composition and as of June 19, 2019, certified membership through the end of 2020. P4W is one of few boards in the state to be certified.

### **Workforce System Mapping**

Jack Mills, principal of Smart Future Strategy, presented several flow charts of P4W's core programs (adult, dislocated worker, youth, EARN and Work Ready, Learn & Earn) demonstrating the number of people served by programs, decision-trees, referrals, outputs, outcomes, and areas for improvement. The purpose of the presentation was to show the interconnectedness (or lack thereof) of core programs, the number of people served, the outcomes of those efforts, and to establish a baseline of how strategic business services could impact outcomes.

He commended the board for its efforts to go beyond the core programs, with the implementation of programs such as Intro to the Trades and BankWork\$, and making data-informed decisions to drive programs.

Through his presentation, Mr. Mills pointed out programs or resources P4W programs could connect to, or connect more deeply to, to effect change. As an example, Mr. Mills discussed opportunities for EARN and Work Ready to be more deeply connected the other programs to provide the next step on a career pathway. Other services for out-of-school youth such as neighborhood employment centers and Job Corps, could be more connected to Partner4Work and its service delivery system

Following his presentation, the Board remarked on the complexity of the material and the difficulty in having any meaningful discussion about the information in a 90-minute board meeting.

### **Year in Review and Fund Development**

With time running short, Earl Buford and CSO Tracey Carey concluded the meeting with an abbreviated year-in-review and fund development report.

Specifically, and in response to the mapping presentation, Mr. Buford reiterated that the workforce development world is complex. Core programs and basic investments are insufficient to make an impact. Additional resources and contracting changes – such contracting with two Title I providers – would be necessary to respond to the business community and effect change. At the next Board meeting, Mr. Mills' illustrations would show how business engagement connects with core programs.

He further discussed new funding opportunities and pointed to the development of the funding collaborative with RK Mellon, Heinz and Hillman foundations. Through the funding collaborative, and tapping into national resources such as the National Fund for Workforce Solutions and Midwest Urban Strategies, P4W could be well poised to bridge any gaps in public funding and elevate the local workforce system.

The fund development report, included in the board book, was reviewed by the group, showing \$550,000 in new funding received since the last board meeting.

**Rich Barcaskey, seconded by Steve Massaro, the board unanimously accepted \$550,000 in grant funding received since the last meeting.**

As a final comment, Mr. Buford announced that the board of Midwest Urban Strategies (MUS) recently named Tracey Carey, P4W's CSO, as its first executive director. Ms. Carey would take the lead of MUS in August.

**OPEN FORUM/PUBLIC COMMENT**

No additional Board discussion. No public comment.

**ADJOURNMENT OF MEETING**

**On a motion by Debra Caplan, seconded by Scott Pipitone, the meeting adjourned at 9:59 a.m.**

## **Local and Regional Workforce Development Plan Modifications**

The Workforce Innovation and Opportunity Act (WIOA) requires local workforce development boards and chief elected officials to engage in an integrated regional and local workforce planning process to prepare, submit, and obtain approval of a single collaborative regional plan that incorporates local plans for each of the local areas within the given workforce planning region. These plans serve as a four-year action plans to develop, align, and integrate service delivery strategies to support the commonwealth's vision, strategic and operational goals.

The Southwest Planning Region is a nine-county workforce development planning region made up of five local workforce development areas (WDAs): Allegheny County WDA, City of Pittsburgh WDA, Southwest Corner WDA, Tri-County WDA, and Westmoreland-Fayette WDA. Four local workforce development boards (LWDB) oversee these local areas:

- Partner4Work (Allegheny County WDA and City of Pittsburgh WDA)
- Southwest Corner Workforce Development Board (SW Corner)
- Tri-County Workforce Development Board (TCWIB)
- Westmoreland-Fayette Workforce Development Board (Westmoreland-Fayette)

The SW Region has conducted a review of its current multi-year regional and local plans (PY2017 – PY2019) and incorporated necessary modifications into these documents. These modifications have been posted for a 30-day public comment period from August 23 – September 23, 2019. A summary of modifications made to each plan is available below.

### **Summary of Regional and Local Plan Modifications**

#### **Southwest Regional Plan – Key Modifications**

Below is a summary of the key modifications made to the WIOA Regional Plan for the Southwest Pennsylvania region:

- Updated references to projects that have ended (Veterans' Value Initiative, Microcredentials, etc.);
- Added language on regional collaboration through the recent USDOL Dislocated Worker grant;
- Updated reference to Pittsburgh Works, emphasizing a transition in branding to the P4W Coordination Council and Industry Partnership efforts;
- Per the request of the PA Department of Labor and Industry, expanded the discussion on coordination between workforce development and economic development.

#### **Partner4Work Local Plan – Key Modifications:**

Below is a summary of the key modifications made to the WIOA Local Plan for Allegheny County and the City of Pittsburgh:

- Updated language to reflect recent WIOA Title I Adult/Dislocated Worker procurement and current programming;
- Updated language to reflect recent WIOA/TANF Youth procurement and current programming;
- Updated language to reflect recent WIOA One-Stop Operator procurement and current scope of work of the Operator;
- Revised language to reflect the transition from the Pittsburgh Works model to P4W Coordination Council and Industry Partnership efforts;
- Revised references to specific organizations and service providers to reduce the need for more frequent updates and modifications;
- Revised references to programs for which the project and/or grant period has ended;
- Updated program and performance numbers, as appropriate.

### Southwest Corner WDB Local Plan – Key Modifications:

Below is a summary of the key modifications made to the WIOA Local Plan for Southwest Corner Workforce Development Area:

- Updated partnership information and services offered in the area and at local PACL centers;
- Updated information to include additional focus on apprenticeships, incumbent worker training, customized job training, and WDB-led business service efforts;
- Revised references to programs for which the project and/or grant period has ended;
- Updated program and performance numbers, as appropriate;
- Updated grant-funded program information and benefits to the area.

### Tri-County WDB Local Plan – Key Modifications:

Below is a summary of the key modifications made to the WIOA Local Plan for the Tri-County Workforce Development Area (Butler, Armstrong, and Indiana Counties).

- Updated language to reflect recent WIOA Title I Adult/Dislocated Worker procurement;
- Updated language on business engagement;
- Updated EO Liaisons;
- Updated RESEA information;
- Updated program language for working with colleges and schools;
- Updated performance numbers.

### Westmoreland-Fayette WDB Local Plan – Key Modifications:

Below is a summary of the key modifications made to the WIOA Local Plan for the Westmoreland-Fayette Workforce Development Area:

- Updated language on strategies to engage employers;
- Updated language on promoting entrepreneurial training;
- LWDB board actions related to Perkins Act, Section 134;
- Updated partner information and performance numbers

## P4W Policy Recommendations

To ensure alignment with WIOA and additional state and federal requirements, Partner4Work must develop program policies that guide how WIOA-funded Adult, Dislocated Worker, and Youth services are delivered in Pittsburgh and Allegheny County. These policies must be voted on and approved by the Partner4Work Board of Directors prior to local implementation.

In Spring 2019, Partner4Work staff conducted a review of local WIOA training policies (Individual Training Account, On-the-Job Training, Customized Job Training, Incumbent Worker Training, and Transitional Jobs) to identify opportunities for revising these documents to enhance flexibility and capacity to develop new, employer-driven training programs. The review was a collaborative effort across the Program, Strategy, and Compliance departments and was supported by best practice research and available participant and training-related data.

As a result of this review, Partner4Work staff presented recommendations for policy revisions to the Service Delivery Committee on June 26, 2019. These recommendations largely focus on reducing locally-imposed restrictions on job seekers and employers, not required by state or federal policy, and increase local flexibility in determining funding available for training programs. The committee voted to approve the recommendations and present to the Executive Committee for final approval.

## P4W Training Policies – Revisions

Recommendations	Program Impact	Fiscal Impact
<b>Individual Training Account Policy</b> Describes requirements for using WIOA-funded Individual Training Accounts (ITAs) in Pittsburgh/Allegheny County. An <i>Individual Training Account</i> is a funding mechanism through which eligible individuals can access quality training to obtain employment in high demand occupations.		
<p><b><u>Recommendation #1: Revise funding level cap to \$5,000 for an ITA</u></b></p> <ul style="list-style-type: none"> <li>Remove current method for determining ITA funding levels, which sets funding caps based on annual openings and average wages of the training occupation based on HPO data.</li> <li>Change will allow participants to receive up to \$5,000 in ITA funding annually.</li> <li>Exceptions to the \$5,000 limit may be permitted if there is a written commitment of an employer to hire (pending P4W funding availability).</li> <li>All programs on the ETPL approved by another LWDB must meet P4W ETPL criteria to receive funding.</li> </ul>	<p>Less restrictions on P4W's ability to fund training programs, particularly programs aligned with industry partnership initiatives.</p> <p>Less need for P4W to regularly approve exceptions for ITA funding levels.</p> <p>An increase in programs on the ETPL that may qualify for the full \$5,000 ITA amount.</p>	<p>Potential that P4W may fund ITAs over \$5,000 (if there is an employer commitment to hire);</p> <p>The current estimated ITA cost per participant is <b>\$4,276</b>, which indicates participants typically qualify for the \$5,000 funding cap. Further, only <b>7 of 119</b> participants from July 2018 – March 2019 were capped at the \$2,500 level. Therefore, these changes to how ITA funding levels are determined should have minimal impact on the number of ITA participants who can be served.</p>
<p><b><u>Recommendation #2: Remove restriction on quitting employment to attend training:</u></b></p> <ul style="list-style-type: none"> <li>Remove language in ITA policy that prohibits individuals from quitting their current employment to attend training;</li> <li>Instead, it should be determined based on an assessment that an individual is in need of training to obtain or retain employment at the self-sufficiency wage or wages comparable to or higher than those from previous employment. (WIOA Requirement)</li> </ul>	<p>Creates less restrictions on a participant's ability to access training, including removing a barrier for individuals in low wage jobs that want to pursue training along a career pathway.</p>	<p>May lead to additional individuals being eligible for training and, thus, an increase in demand for training dollars. However, this is difficult to determine with current information and should be monitored accordingly.</p>

<p><b>Recommendation #3: Limit individuals to a maximum of \$5,000 in ITA funding per year:</b></p> <ul style="list-style-type: none"> <li>Maintain the ability of Individuals to receive multiple ITAs if along a career pathway, while setting a limitation on the total amount of funding the individual may receive within a given program year.</li> </ul>	<p>Enable participants to pursue multiple trainings along a career pathway to support continued career growth. Sets some limits to encourage employment following training completion.</p>	<p>Reduces risk of individuals pursuing multiple trainings within a program year with a high cost per participant.</p> <p>Helps to ensure a more equitable distribution of ITA funds across participants.</p>
<p><b>Next Steps:</b></p> <p>P4W will develop a research and data-driven ETPL policy that sets higher standards for our local ETPL than statewide criteria.</p>	<p>Setting higher local standards will help to further maintain quality of locally-funded training programs in Allegheny County.</p>	<p>Potential greater return on investment if funds are only directed toward programs that meet P4W's higher local ETPL standards.</p>
<p><b>Customized Job Training Policy</b></p> <p>Describes how WIOA - Customized Job Training (CJT) funds are to be administered in Pittsburgh/Allegheny County. <i>Customized Job Training</i> means training by an employer or employers or by a training provider in conjunction with an employer that is provided to five or more paid participants concurrently while engaged in productive work in a job.</p>		
<p><b>Recommendation #1: Revise priority industries to align with P4W industry partnerships:</b></p> <ul style="list-style-type: none"> <li>Include language to focus funding on IPs: "P4W will prioritize funding for training in Manufacturing, Construction, Healthcare, Information Technology, Retail and Hospitality, Transportation and Logistics, Financial Services, and the Public Sector and Education".</li> </ul>	<p>Small update to align with the full range of P4W IP industries.</p>	<p>Affirms that P4W will prioritize funding toward IP industries.</p>
<p><b>Recommendation #2: Set reimbursement rate at 50% the cost of training instead of different rates by employer size. Set criteria for increasing the reimbursement rate to 75% (or maximum permitted):</b></p> <p>Recommended Language: "Partner4Work will consider an increase in the reimbursement rate to 75%, taking into consideration one or more of the following factors:</p> <ul style="list-style-type: none"> <li>Size of the employer(s) with an emphasis on small businesses;</li> <li>The characteristics of the participants taking into consideration whether they are individuals with barriers to employment;</li> <li>The quality of employer-provided training and advancement opportunities, for example if the CJT contract is for an in-demand occupation and will lead to an industry-recognized credential;</li> <li>Wage and benefit levels of employees (at present and anticipated upon completion of training);</li> <li>The degree to which an employer's practices align with the principles of a <i>High Road Employer</i><sup>1</sup>;</li> <li>Other relevant factors, as appropriate.</li> </ul>	<p>Creates wider range of criteria for which P4W can increase the employer reimbursement rate to 75% (or maximum permitted), while setting a standard 50% for all employers (including large).</p> <p>This should reduce potential funding roadblocks when P4W pursues CJT programming with employers.</p>	<p>Could potentially lead to an increase in the number of employers who qualify for 75% reimbursement rates; This might lead to higher cost-per-participant in some instances.</p>

<sup>1</sup> This is a term that was adopted by the [American Sustainable Business Council](#) and has been used during P4W's development of industry partnerships.



<p><b><u>Recommendation #3: Incorporate timing requirement to prevent employers from being able to establish multiple individual OJTs rather than a combined CJT.</u></b></p> <ul style="list-style-type: none"> <li>• Insert language: “Employers training 5 or more individuals within a single quarter (3-month period) must meet the requirements for CJT rather than OJT”.</li> </ul>	<p>This will help to ensure that employers are set at the lower CJT cap when training multiple participants within a given quarter rather than establishing individual OJT contracts with multiple participants.</p>	<p>This will help maintain a lower cost-per-participant cap for employers training multiple participants within a short time period.</p>
<p><b>On-the-Job Training Policy</b></p> <p>Describes how WIOA – On-the-Job (OJT) funds are to be administered in Pittsburgh/Allegheny County. <i>On-the-Job Training</i> means training by an employer that is provided to a paid participant while engaged in productive work in a job.</p>		
<p><b><u>Recommendation #1: Revise priority industries to align with P4W industry partnerships:</u></b></p> <ul style="list-style-type: none"> <li>• Include language to focus funding on IPs: “P4W will prioritize funding for training in Manufacturing, Construction, Healthcare, Information Technology, Retail and Hospitality, Transportation and Logistics, Financial Services, and the Public Sector and Education”.</li> </ul>	<p>Small update to align with the full range of P4W IP industries.</p>	<p>Affirms that P4W will prioritize funding toward IP industries.</p>
<p><b><u>Recommendation #2: Set reimbursement rate at 50% the cost of training instead of different rates by employer size. Set criteria for increasing the reimbursement rate to 75% (or maximum allowed):</u></b></p> <p>Recommended Language: “Partner4Work will consider an increase in the reimbursement rate to 75% (or maximum allowed), taking into consideration one or more of the following factors:</p> <ul style="list-style-type: none"> <li>• Size of the employer(s) with an emphasis on small businesses;</li> <li>• The characteristics of the participants taking into consideration whether they are individuals with barriers to employment;</li> <li>• The quality of employer-provided training and advancement opportunities, for example if the OJT contract is for an in-demand occupation and will lead to an industry-recognized credential;</li> <li>• Wage and benefit levels of employees (at present and anticipated upon completion of training);</li> <li>• The degree to which the employer’s practices align with the principles of a <i>High Road Employer</i>;</li> <li>• Other relevant factors, as appropriate.</li> </ul>	<p>Creates wider range of criteria for which P4W can increase the employer reimbursement rate to 75% (or maximum allowed), while setting a standard 50% for all employers (including large).</p> <p>This should reduce potential funding roadblocks when P4W pursues OJT programming with employers.</p>	<p>Could potentially lead to an increase in the number of employers who qualify for 75% reimbursement rates; This might lead to higher cost-per-participant.</p>
<p><b>Incumbent Worker Training Policy</b></p> <p>Describes how WIOA – Incumbent Worker Training (IWT) funds are to be administered in Pittsburgh/Allegheny County. <i>Incumbent Worker Training</i> means training by an employer or training provider in close partnership with an employer that is provided to a paid participant while engaged in productive work in a job.</p>		
<p><b><u>Recommendation #1: Revise priority industries to align with P4W industry partnerships:</u></b></p> <ul style="list-style-type: none"> <li>• Include language to focus funding on IPs: “P4W will prioritize funding for training in Manufacturing, Construction, Healthcare, Information Technology, Retail and Hospitality, Transportation and Logistics, Financial</li> </ul>	<p>Small update to align with the full range of P4W IP industries.</p>	<p>Affirms that P4W will prioritize funding toward IP industries.</p>

<p>Services, and the Public Sector and Education”.</p>		
<p><b><u>Recommendation #2: Increase reimbursement rates to the maximum permitted under WIOA:</u></b></p> <ul style="list-style-type: none"> <li>• WIOA requires reimbursement rates for IWT to be based on employer size. WIOA allows the following reimbursement rates for the cost of training: <ul style="list-style-type: none"> <li>○ 90% of the cost of training (50 or fewer employees) – P4W currently allows 80%</li> <li>○ 75% of the cost of training (51-100 employees) - P4W currently allows 60%</li> <li>○ 50% of the cost of training (More than 100 employees) – P4W currently allows 40%</li> </ul> </li> </ul>	<p>Provides for a moderate increase in the percentage for which P4W can reimburse employers for IWT and creates policy more closely aligned with what is permitted under WIOA.</p>	<p>May lead to a higher cost per participant for IWT.</p> <p>There will be a need to monitor to ensure spending does not exceed 20% of P4W's total Adult/DW WIOA allocation.</p>
<p><b><u>Recommendation #3: Increase funding cap of IWT to align with the funding cap for customized job training from \$1,000 to \$5,000 per participant.</u></b></p>	<p>Provides flexibility for Partner4Work to make higher investments in IWT per participant.</p>	<p>A higher potential cost-per-participant may lead to fewer participants who can be served annually with IWT funding.</p> <p>P4W will need to continue to monitor spending to ensure no more than 20% of WIOA funding is spent on IWT.</p>

**Transitional Jobs Policy**

Describes how WIOA – Transitional Jobs (TJs) funds are to be administered in Pittsburgh/Allegheny County. *Transitional Job* means paid work experience that: 1) Is time limited and subsidized; 2) Is in the public, private, or nonprofit sector; 3) Is provided to individuals with barriers to employment who are chronically unemployed or have an inconsistent work history; 4) Is combined with comprehensive employment and supportive services; 5) Is designed to help participants establish a work history, demonstrate success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment.

<p><b><u>Recommendation #1: Remove language that specifies that TJ services will be procured.</u></b></p> <ul style="list-style-type: none"> <li>• P4W should still reserve the right to procure TJ services, particularly programming that incorporates other employment and supportive services.</li> <li>• However, it is also possible for a TJ to be set up similar to an OJT, with an employer providing work experience while employment and supportive services are managed by the Title I Adult/DW provider.</li> </ul>	<p>Provides flexibility for P4W to develop TJ programs with employers outside of the requirement for competitive procurement.</p>	<p>Policy change could create additional options for P4W-funded TJs. There will be a need to continue to monitor spending so that it falls P4W does not spend more than 10% of their WIOA funding on transitional jobs.</p>
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**Underemployed Definition**

WIOA encourages state and local boards to develop definitions for underemployed, as a part of their criteria for determining eligibility and priority status for WIOA Adult/Dislocated Worker services.

<p><b><u>Recommendation #1: Incorporate the following definition of underemployed into P4W policy:</u></b></p> <p>Partner4Work defines “underemployed” as meeting one or more of the following criteria:</p> <ul style="list-style-type: none"> <li>• An individual who is employed less than full-time who is seeking full-time employment, including individuals who may be employed at full-time across multiple positions, but are seeking full-time employment at a single position;</li> </ul>	<p>This definition can be incorporated in P4W Adult/DW eligibility policy, clarifying that individuals who are underemployed can still qualify as a Dislocated Worker or Priority of Service individual.</p>	<p>This policy may help to increase dislocated worker enrollment and, thereby, participants funded through dislocated worker dollars.</p>
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<ul style="list-style-type: none"><li>• An individual who is employed in a position that is inadequate with respect to their skills and training;</li><li>• An individual who is employed, but earning a wage that is below the self-sufficiency wage as defined by Partner4Work's Self-Sufficiency Policy; or</li><li>• An individual who is employed, but whose earnings are not sufficient compared to their previous position's earnings from their previous employment.</li></ul>		
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**TRWIB INC**  
**Statement of Financial Position**  
**As of June 30, 2019**

<b>ASSETS</b>	
Current Assets	
Checking/Savings	\$ 2,767,166
Accounts Receivable	\$ 5,540,805
Other Current Assets	\$ 68,253
Total Current Assets	<u>\$ 8,376,224</u>
Other Assets	
Fixed Assets (net of depreciation)	\$ 57,965
Other Assets	\$ 6,066
Total Other Assets	<u>\$ 64,031</u>
<b>TOTAL ASSETS</b>	<u><u>\$ 8,440,255</u></u>
<b>LIABILITIES &amp; NET ASSETS</b>	
Liabilities	
Current Liabilities	
Due to Subrecipients	\$ 3,247,911
Accounts Payable	\$ 211,543
Advance Payments	\$ -
Other Current Liabilities	\$ 160,067
Total Current Liabilities	<u>\$ 3,619,521</u>
Total Liabilities	<u>\$ 3,619,521</u>
Net Assets	
Unrestricted	\$ 764,096
Temporarily Restricted	\$ 5,846,909
Current Period Activity	\$ (1,790,271)
Total Net Assets	<u>\$ 4,820,734</u>
<b>TOTAL LIABILITIES &amp; NET ASSETS</b>	<u><u>\$ 8,440,255</u></u>

**TRWIB, Inc.**  
**Net Asset Rollforward**  
**As of June 30, 2019**

**TEMPORARILY RESTRICTED FUNDS**

	Miscellaneous	Sector Strategies	Pittsburgh Works	Place Based Strategies	Adult TANF	Learn & Earn	Total
<b>Balances as of July 1, 2018</b>	\$ 38,924	\$ 115,851	\$ 129,566	\$ 214,566	\$ 3,124,073	\$ 2,223,929	\$ 5,846,909
<b>Activity: July 1, 2018 to June 30, 2019</b>							
<b>CY Additions to Temp Restricted Fd:</b>							
<b>Restricted Grants Received:</b>							
Careerlink Contributions	27,954						27,954
TANF Performance Bonus					868,500		868,500
Corporate Sponsorships			11,000			70,550	81,550
Citizen's Bank Foundations	-	200,000	45,000	-		150,000	45,000
<b>Sub-Total</b>	<b>27,954</b>	<b>200,000</b>	<b>56,000</b>	<b>100,000</b>	<b>868,500</b>	<b>220,550</b>	<b>1,473,004</b>
<b>Reimb. received from Rest Grants:</b>							
Urban Strategies CNI	-	-	-	81,003	-	-	81,003
State Grants	-	584,689	-	-	1,998,105	821,844	3,404,638
<b>Sub-Total</b>	<b>-</b>	<b>584,689</b>	<b>-</b>	<b>81,003</b>	<b>1,998,105</b>	<b>821,844</b>	<b>3,485,641</b>
<b>Total Rest. Funds Received:</b>	<b>27,954</b>	<b>784,689</b>	<b>56,000</b>	<b>181,003</b>	<b>2,866,605</b>	<b>1,042,394</b>	<b>4,958,645</b>
<b>Expenses incurred this period related to these restricted programs:</b>	<b>(4,575)</b>	<b>(827,190)</b>	<b>(150,637)</b>	<b>(311,718)</b>	<b>(2,509,397)</b>	<b>(2,945,400)</b>	<b>(6,748,917)</b>
<b>Net Activity: July 1, 2018 to June 30, 2019</b>	<b>23,379</b>	<b>(42,501)</b>	<b>(94,637)</b>	<b>(130,715)</b>	<b>357,208</b>	<b>(1,903,006)</b>	<b>(1,790,272)</b>
<b>Fund Balance Balance at 6/30/2019</b>	<b>\$ 62,303</b>	<b>\$ 73,350</b>	<b>\$ 34,929</b>	<b>\$ 83,851</b>	<b>\$ 3,481,281</b>	<b>\$ 320,923</b>	<b>\$ 4,056,637</b>
AR Balance at June 30, 2019	-	-	-	-	(426,763)	(35,865)	(462,628)
<b>TR Cash Balance at June 30, 2019</b>	<b>\$ 62,303</b>	<b>\$ 73,350</b>	<b>\$ 34,929</b>	<b>\$ 83,851</b>	<b>\$ 3,054,518</b>	<b>\$ 285,058</b>	<b>\$ 3,594,009</b>

<b>Assets Released from Restriction (as presented on the Statement of Activities):</b>	
Expenses incurred this period related to these restricted programs	\$ (6,748,917) (A)
Less: Reimbursements received from Restricted Grants	3,485,641 (B)
<b>Assets Released from Restriction</b>	<b>\$ (3,263,276)</b>

**TRWIB INC**  
**Statement of Activities**  
**July 1, 2018 through June 30, 2019**

		Reimbursement Contracts						Restricted Grants								
		Management & General	Midwest Urban Strategies	Allegheny County WIOA	City of Pittsburgh WIOA	TANF	PA CareerLink	Federal WIOA	Sector Strategies	Pittsburgh Works	Place Based Strategies	Learn & Earn	Total Program	Total Unrestricted	Temporarily Restricted	TOTAL
		(Unrestricted)	(Program)	(Program)	(Program)	(Program)	(Program)	(Program)	(Program)	(Program)	(Program)	(Program)	(Unrestricted)			
Ordinary Income/Expense																
Income																
	4000 · Public Funds/Government Grants	0	141,008	4,970,511	3,414,279	5,443,668	338,431	1,222,809	584,689	0	81,003	819,344	16,874,734	16,874,734	896,454	17,771,188
	4200 · Foundation & Private Contrib	3,361		0	0	0	0	0	0	0	0	2,500	2,500	5,861	576,550	582,411
	4300 · Interest	5,926		0	0	0	0	0	0	0	0	0	0	5,926	0	5,926
	4400 · Inter-Fund Transfer	0		0	0	0	0	0	0	0	0	0	0	0	0	0
	4700 · Other Income	0		0	0	0	0	0	0	0	0	0	0	0	0	0
	4800 · Assets Released frm Restriction	0		0	0	511,292	4,575	0	242,501	150,637	230,715	2,123,556	3,263,276	3,263,276	(3,263,276)	0
	4999 · Do Not Post to this Item.	0		0	0	0	0	0	0	0	0	0	0	0	0	0
	<b>Total Income</b>	<b>9,287</b>	<b>141,008</b>	<b>4,970,511</b>	<b>3,414,279</b>	<b>5,954,960</b>	<b>343,006</b>	<b>1,222,809</b>	<b>827,190</b>	<b>150,637</b>	<b>311,718</b>	<b>2,945,400</b>	<b>20,140,510</b>	<b>20,149,797</b>	<b>(1,790,272)</b>	<b>18,359,525</b>
Expense																
	5000 · Direct Program Expenses	0	0	4,088,193	2,539,564	5,204,588	343,006	760,618	615,814	5,715	209,303	2,318,335	16,085,136	16,085,136	0	16,085,136
	5200 · Salary, Wages, and Benefits	765,447	110,200	467,420	492,904	422,764	0	162,309	108,340	96,678	45,188	222,568	2,018,171	2,783,618	0	2,783,618
	5350 · Communication	43,690	71	7,670	170	103	0	0	19	1,468	0	5,028	14,458	58,148	0	58,148
	5370 · Contracted Service	97,991	0	51,958	6,613	621	0	153,701	6,215	36,902	30,708	33,000	319,718	417,709	0	417,709
	5400 · Depreciation Expense	7,606	0	0	27,099	10,738	0	0	0	0	0	4,980	42,817	50,423	0	50,423
	5450 · Equipment Expense	63,266	0	0	0	0	0	0	8,014	0	0	80	8,094	71,360	0	71,360
	5500 · Fiscal	48,478	0	0	0	0	0	0	0	0	0	0	0	48,478	0	48,478
	5650 · Insurance	15,907	0	0	0	0	0	0	0	0	0	0	0	15,907	0	15,907
	5660 · Information Technical Service	81,305	0	0	0	13,000	0	0	0	0	0	40,731	53,731	135,036	0	135,036
	5700 · Legal Expense	4,817	7	2,095	2,095	0	0	0	2,308	0	0	860	7,358	12,175	0	12,175
	5750 · Materials / Supplies	36,647	78	0	0	0	0	587	0	0	0	1,031	1,618	38,265	0	38,265
	5760 · Meeting Expense	30,514	1,013	1,678	1,511	1,175	0	267	1,418	1,859	841	1,596	10,345	40,859	0	40,859
	5770 · Memberships	30,745	0	0	0	1,500	0	0	0	0	0	0	1,500	32,245	0	32,245
	5850 · Other Miscellaneous	1,707	0	0	0	0	0	0	0	0	0	0	0	1,707	0	1,707
	5900 · Postage / Messenger	1,705	0	0	0	0	0	55	0	0	0	12	67	1,772	0	1,772
	5940 · Publications	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	5950 · Rent	50,322	0	30,729	32,404	27,793	0	10,670	7,122	6,356	2,971	14,632	132,677	182,999	0	182,999
	6000 · Staff Administration	26,597	0	0	0	0	0	0	0	0	0	203	203	26,800	0	26,800
	6050 · Telephone	38,722	0	0	0	0	0	0	0	0	0	760	760	39,482	0	39,482
	6060 · Temporary Service	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	6070 · Training	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	6080 · Travel & Conference	56,849	29,639	20,998	20,429	5,265	0	2,014	211	1,659	0	253	50,829	107,678	0	107,678
	6900 · Distributed Costs	(1,393,028)	0	299,770	291,490	267,413	0	132,588	77,729	0	22,707	301,331	1,393,028	0	0	0
	<b>Total Expense</b>	<b>9,287</b>	<b>141,008</b>	<b>4,970,511</b>	<b>3,414,279</b>	<b>5,954,960</b>	<b>343,006</b>	<b>1,222,809</b>	<b>827,190</b>	<b>150,637</b>	<b>311,718</b>	<b>2,945,400</b>	<b>20,140,510</b>	<b>20,149,797</b>	<b>0</b>	<b>20,149,797</b>
	<b>Net Ordinary Income</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>0</b>	<b>0</b>	<b>(0)</b>	<b>(1)</b>	<b>(1)</b>	<b>(1,790,272)</b>	<b>(1,790,272)</b>
	<b>Net Income</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>(0)</b>	<b>0</b>	<b>0</b>	<b>(0)</b>	<b>(1)</b>	<b>(1)</b>	<b>(1,790,272)</b>	<b>(1,790,272)</b>

(A)

**Partner4Work  
Budget Vs Actual  
June 30, 2019**

	<b>BUDGET</b>	<b>6/30/2019 ACTUAL</b>	<b>Over (Under) VARIANCE</b>
Ordinary Income/Expense			
Income			
4000 · Public Funds/Government Grants	\$ 20,446,556	\$ 16,874,734	\$ (3,571,822)
4200 · Foundation & Private Contrib	\$ 153,642	\$ 5,861	\$ (147,781)
4300 · Interest	\$ 3,500	\$ 5,926	\$ 2,426
4800 · Assets Released frm Restriction	\$ 1,312,292	\$ 3,263,276	\$ 1,950,984
<b>Total Income</b>	<b>\$ 21,915,990</b>	<b>\$ 20,149,797</b>	<b>\$ (1,766,193)</b>
Expense			
5000 · Direct Program Expenses	\$ 17,700,131	\$ 16,085,136	\$ (1,614,995)
5200 · Salary, Wages, and Benefits	\$ 3,267,659	\$ 2,783,618	\$ (484,041)
5350 · Communication	\$ 85,000	\$ 58,148	\$ (26,852)
5370 · Contracted Service	\$ 155,000	\$ 417,709	\$ 262,709
5400 · Depreciation Expense	\$ 10,740	\$ 50,423	\$ 39,683
5450 · Equipment Expense	\$ 56,000	\$ 71,360	\$ 15,360
5500 · Fiscal	\$ 55,000	\$ 48,478	\$ (6,522)
5650 · Insurance	\$ 14,000	\$ 15,907	\$ 1,907
5660 · Information Technical Service	\$ 112,500	\$ 135,036	\$ 22,536
5700 · Legal Expense	\$ 27,500	\$ 12,175	\$ (15,325)
5750 · Materials / Supplies	\$ 51,700	\$ 39,260	\$ (12,440)
5760 · Meeting Expense	\$ 52,000	\$ 40,859	\$ (11,141)
5770 · Memberships	\$ 40,000	\$ 32,245	\$ (7,755)
5900 · Postage / Messenger	\$ 2,500	\$ 1,772	\$ (728)
5940 · Publications	\$ 2,000	\$ -	\$ (2,000)
5950 · Rent	\$ 177,500	\$ 182,999	\$ 5,499
6000 · Staff Administration	\$ 20,000	\$ 26,800	\$ 6,800
6050 · Telephone	\$ 17,500	\$ 39,482	\$ 21,982
6070 · Training	\$ -	\$ -	\$ -
6080 · Travel & Conference	\$ 80,000	\$ 107,678	\$ 27,678
6900 · Distributed Costs	\$ -	\$ 0	\$ 0
<b>Total Expense</b>	<b>\$ 21,926,730</b>	<b>\$ 20,149,797</b>	<b>\$ (1,776,933)</b>
<b>Net Income</b>	<b>\$ (10,740)</b>	<b>\$ (1)</b>	<b>\$ 10,739</b>

**TRWIB INC**

**Budget vs Actual - Management & General**

	<b>ANNUAL BUDGET</b>	<b>6/30/2019 ACTUAL</b>	<b>VARIANCE</b>
Ordinary Income/Expense			
Income			
4000 · Public Funds/Government Grants	0	0	0
4200 · Foundation & Private Contrib	0	3,361	3,361
4300 · Interest	3,500	5,926	2,426
4400 · Inter-Fund Transfer	0	0	0
4700 · Other Income	0	0	0
4800 · Assets Released frm Restriction	0	0	0
Total Income	<u>3,500</u>	<u>9,287</u>	<u>5,787</u>
Gross Profit	3,500	9,287	5,787
Expense			
5000 · Direct Program Expenses	0	0	0
5200 · Salary, Wages, and Benefits	1,067,659	765,447	(302,212)
5350 · Communication	35,000	43,690	8,690
5370 · Contracted Service	30,000	97,991	67,991
5400 · Depreciation Expense	0	7,606	7,606
5450 · Equipment Expense	45,000	63,266	18,266
5500 · Fiscal	55,000	48,478	(6,522)
5650 · Insurance	14,000	15,907	1,907
5660 · Information Technical Service	75,000	81,305	6,305
5700 · Legal Expense	15,000	4,817	(10,183)
5750 · Materials / Supplies	25,000	36,647	11,647
5760 · Meeting Expense	25,000	30,514	5,514
5770 · Memberships	40,000	30,745	(9,255)
5850 · Other Miscellaneous	0	1,707	1,707
5900 · Postage / Messenger	2,500	1,705	(795)
5940 · Publications	2,000	0	(2,000)
5950 · Rent	147,500	50,322	(97,178)
6000 · Staff Administration	20,000	26,597	6,597
6050 · Telephone	17,500	38,722	21,222
6060 · Temporary Service	0	0	0
6070 · Training	0	0	0
6080 · Travel & Conference	20,000	56,849	36,849
6900 · Distributed Costs	(1,632,659)	(1,393,028)	239,631
Total Expense	<u>3,500</u>	<u>9,287</u>	<u>5,787</u>
Net Ordinary Income	<u>0</u>	<u>0</u>	<u>0</u>
	<u>0</u>	<u>0</u>	<u>0</u>



### 2018-2019 Fund Development

Opportunity	Funder	Amount Requested	Amount Received	Accepted/Denied (Anticipated Award Announcement Date in parentheses)	Performance Period	Description
Business Education Partnership	PA Department of Labor and Industry	\$128,490	\$115,641	<b>Accepted</b>	January 1, 2019-June 30, 2020	In partnership with the Builders Guild, implement a three part program that will include a career fair, summer internship in relation to construction trades, and trades member guidance during the following school year.
Apprenticeship Planning	PA Department of Labor and Industry	\$60,906	\$60,906	<b>Accepted</b>	January 1, 2019-June 30, 2020	Funding to assist with P4W's growing apprenticeship role within the region. It is a planning grant to begin to put the necessary infrastructure in place to become a hub of innovative apprenticeship programs.
SLIP (State and Local Internship Program)	PA Department of Labor and Industry	\$205,000	\$146,138.37	<b>Accepted</b>	May 1, 2019-August 30, 2019	Build on our prior SLIP funding and better integrate SLIP interns with the Learn and Earn Corporate program. Funds will augment the pay of interns at \$10.35/hr as well as to support our efforts to recruit new participants.
CNI – Hamilton-Larimer/East Liberty Gardens	The Pittsburgh Foundation	\$100,000	\$100,000	<b>Accepted</b>	January 1, 2019-December 31, 2019	Support neighborhood-based strategy to engage residents (or ex-residents) of Hamilton-Larimer and East Liberty Gardens and connect them to resources and support their workforce and education needs.

						Funds will help ramp-down the project and build a sustainable network for participants.
Financial Empowerment Center	Cities for Financial Empowerment	\$50,000	<b>\$0</b>	<b>Denied</b>	January 1, 2019-December 31, 2019	Funds to help support the implementation of the Financial Empowerment Center model at downtown CareerLink and EARN locations, as well as to support P4W's efforts in financial literacy work.
Learn and Earn	McAuley Foundation	\$50,000	\$50,000	<b>Accepted</b>	May 1, 2019-August 30, 2019	Support 20 youth from the Hill, West Oakland and Uptown to participate in Learn and Earn
PA Smart Industry Partnerships – Convening Proposals	PA Department of Labor and Industry	\$45,000 Each (\$180,000 total)	\$90,000	<b>K-12 Ed.: Accepted Financial Service: Accepted Healthcare: Denied Transportation: Denied</b>	February 1, 2019-June 30, 2020	4 different proposals to convene industry partners to identify shared needs and develop an action plan in the following sectors: financial services, transportation and logistics, K-12 education, and healthcare.
PA Smart Industry Partnerships – Implementation Proposals	PA Department of Labor and Industry	\$250,000 Each (\$500,000 total)	\$500,000	<b>Accepted</b>	February 1, 2019-June 30, 2020	2 proposals to begin/continue implementation of industry developed action plans that will address shared needs. The construction IP will continue the work begun by the mayor's office and the early childhood education IP will continue the work done by both Trying Together and the mayor's office.
PA Smart Apprenticeship	PA Department of Labor and Industry	\$150,000 each	<b>ECE RA: \$100,000</b>	<b>1 Accepted 1 Denied</b>	February 1, 2019-June 30, 2020	2 proposals to replicate existing apprenticeship programs for early

		(\$300,000 total)	<b>Financial Advisor: \$0</b>			childhood educators and financial advisors. The ECE RA was developed by 1199-c in Philadelphia and will be in partnership with Trying Together, Carlow, CCAC and the state. The Financial Advisor RA was developed by Principal Financial in Milwaukee and will be in partnership with Principal and Citizens Bank.
PA Smart Pre-Apprenticeship	PA Department of Labor and Industry	\$150,000	\$45,950	<b>Accepted</b>	February 1, 2019-June 30, 2020	Funding to work with the Builders Guild and Pittsburgh Gateways to begin work to tailor the Intro to the Trades program to better align with the industry needs.
Teacher in the Workplace	PA Department of Labor and Industry and the Department of Education	\$50,000 Each (\$250,000 total)	\$244,000	<b>All Accepted</b>	April 1, 2019-June 30, 2020	5 proposals to continue or develop Teacher in the Workplace programs that will provide educators with greater exposure to the careers of today and the skills needed for those careers Partner organizations that will lead the efforts for each project: AIU (Continuation) Consortium for Public Education (Continuation) Phase 4 (New) Nazareth Prep (New) Local CTCs (AW Beattie, Parkway West, PPS) (New)
ECE Apprenticeship	Kellogg Foundation	\$50,000	\$50,000	<b>Accepted</b>	12 months	Proposal to support planning stages of ECE apprenticeship model replication in coordination with Trying Together, Carlow and CCAC

ECE Apprenticeship and Industry Partnership	Heinz Endowments	\$175,000	\$175,000	<b>Accepted</b>	July 20, 2019-August 31, 2019	Proposal to support two overlapping projects: -Planning stages of ECE apprenticeship model replication in coordination with Trying Together, Carlow and CCAC -Implementation activities of the ECE Industry Partnership
Learn and Earn	Highmark Foundation	\$50,000	\$50,000	<b>Accepted</b>	12 months	Learn and Earn 2019 support
Youth Apprenticeship Expansion	Partnership to Advance Youth Apprenticeship	\$200,000	<b>\$0</b>	<b>Denied</b>	May 2019-October 2020	Funding to begin planning and pilot stages of a youth apprenticeship model with the Boys and Girls Clubs of Western PA. Initial industry engaged is manufacturing.
Learn and Earn	The Pittsburgh Foundation	\$100,000	\$100,000	<b>Accepted</b>	March 2019-August 2019	Learn and Earn 2019 support for the county
Learn and Earn	YSIF (The Pittsburgh Foundation)	\$350,000	\$350,000	<b>Accepted</b>	12 Months	Learn and Earn 2019 support for the city (specifically Housing Authority residents)
I6 Challenge-Regional Innovation Strategies	US Department of Energy	\$750,000	<b>\$0</b>	<b>Denied</b>	July 1, 2019-June 30, 2022	In partnership with WorkHard PGH and the Allegheny Conference, develop a technology small business incubation program that will develop the entrepreneurial skills of those in underserved communities, as well as grow the pipeline of tech workers. Project will be led by WorkHard.

Reentry Programs	US Department of Justice	\$4,500,000	<b>\$0</b>	<b>Denied</b>	July 1, 2019-June 30, 2022	In coordination with 6 other Midwest Urban Strategies cities, the development of a young adult reentry program that will target young adults aged 18-24 who have any criminal justice system involvement and deliver case management and workforce development services for 563 individuals.
Manufacturing On-The-Job Training Program	National Fund for Workforce Solutions	\$125,000	<b>\$0</b>	<b>Denied</b>	24 months	Develop a manufacturing training model that utilizes a 6-10 week on-the-job training period to place participants at small- to mid-size employers. In partnership with CCAC, Pitt MAC, Catalyst Connection and New Century Careers.
Innovative Programs for Underemployed Workers	National Fund for Workforce Solutions	\$50,000	\$50,000	<b>Accepted</b>	July 1, 2019-June 30, 2020	Support to continue the development of both the funding collaborative and the industry partnership model.
BankWork\$ and Lower Hill Workforce Development	Citizens Bank	\$75,000	\$75,000	<b>Accepted</b>	July 15, 2019-December 31, 2020	Support the development of BankWork\$, recruitment and targeting of Hill District residents for BankWork\$ and Intro to the Trades, and more Hill District outreach

Learn and Earn Corporate	Citizens Bank	\$8,000	\$8,000	<b>Accepted</b>	July 1, 2019-September 15, 2019	Learn and Earn Corporate support for 4 youth
YouthBuild	US Department of Labor-ETA	\$1,500,000	N/A	N/A (October 2019)	November 2019-March 2023	A proposal to develop the YouthBuild PGH program in partnership with CEA, Auberle, APRI, Builders Guild, EICI, and Literacy Pittsburgh. The program would provide youth with construction training (including Intro to the Trades, introductory skills training and housing renovation experience) or financial services training (through BankWork\$), as well as GED prep and other academic assistance, provided by Literacy Pittsburgh
BankWork\$	Citizens Bank	\$45,000	\$45,000	<b>Accepted</b>	October 1, 2019-March 30, 2020	Support the development of BankWork\$, First 2 Cohorts

BankWork\$	Dollar Bank	\$10,000	\$10,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts
BankWork\$	First Commonwealth Financial Corporation	\$15,000	\$15,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts
BankWork\$	PNC Financial Services Group, Inc	\$25,000	\$25,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts
BankWork\$	S&T Bank	\$5,000	\$5,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts

BankWork\$	The Pittsburgh Foundation	\$11,000	\$11,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts
BankWork\$	Northwest Bank	\$10,000	\$10,000	<b>Accepted</b>	October 1, 2019- March 30, 2020	Support the development of BankWork\$, First 2 Cohorts
Intro to the Trades	Citizens Bank	\$45,000	<b>\$0</b>	<b>Pending</b>		Support for programming Intro to the trades
Intro to the Trades	Roy A. Hunt	\$25,000	<b>\$0</b>	<b>Pending</b>		Support for programming Intro to the trades



<p>Early Childhood Education Apprenticeship Alignment</p>	<p>Pennsylvania Office of Childhood Development and Early Learning</p>	<p>\$20,000 (\$500,000 total ask by CCAC)</p>	<p>\$20,000</p>	<p><b>Accepted</b></p>	<p>September 10, 2019-December 31, 2019</p>	<p>Overall grant supports further coordination and development of ECE apprenticeship system in the region in coordination with CCAC, Carlow, Trying Together and Literacy Pittsburgh. Partner4Work’s specific work on this grant will be the further development of a pre-apprenticeship network that will be closely tied to the apprenticeship programs.</p>
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*Chief Executive Officer*

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Program Evaluation Manager

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Database Specialist

**Crystaline Barger**  
Learn & Earn Assistant Manager

**David Conway**  
Apprenticeship Manager

**Dillon Corbridge**  
Data Coordinator

**John Crowe**  
Program Coordinator, EARN Work  
Ready

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DWG Coordinator

**Ryan Dodson**  
Junior Accountant

**Bonnie Evans**  
PULSE Fellow

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Contract Administrator

**Nancy Frederick**  
Assistant Grants Manager

**Julia Gagosian**  
Youth Program Coordinatior

**Shuly Goldman**  
Learn & Earn Manager

**Jasmine Herrera**  
Executive Assistant

**Ray Herron**  
Chief Operations Officer

**Raihan Izimbetova**  
TANF Program Manager

**Nic Jaramillo**  
Operations Manager

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HR Specialist

**Tony Townsend**  
Industry Partnership Developer

**Sharon Watkins**  
MUS Compliance Manager

**Spencer Witt**  
Accounting Clerk

## PA CAREERLINK® PITTSBURGH/ALLEGHENY COUNTY SYSTEM

### COMPREHENSIVE CENTERS

#### **Allegheny East**

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

#### **Downtown Pittsburgh**

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

### REGIONAL CENTERS

#### **Alle-Kiski**

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

#### **Mon Valley Regional**

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

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

**Mission**

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**Vision**

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

**Values**

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

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