

**Workforce Innovation and Performance Committee of the Monroe County/Rochester Workforce Development Board**  
**Meeting Minutes**  
**Tuesday, December 5, 2023, 2023**  
**8:00 to 9:00 AM**  
**Meeting Scheduled via ZOOM**

**Present:** Jarmani Dozier, Jennifer Geiger, Randy Andre, Jane Sullivan, Shawna Gareau-Kurtz, Cherie Becker, Lia Festenstein, Patricia Stovall-Lane, Elizabeth O'Brien

**Staff and Guest:** Lee Koslow, Mary McKeown, Viatta Carter, Marisol Young, Laura Seelman, Daniel Donnarumma, Kyle McCarthy

**Approval of Minutes:**

A motion to approve the September 12, 2023 meeting minutes was made by Laura Seelman and seconded by Elizabeth O'Brien. The motion was carried unanimously.

**WIOA Adult/Dislocated Worker Program Performance, July 1, 2022 through June 30, 2023:**

Lee Koslow began this discussion by reviewing the Adult and Dislocated Worker Performance, Program Year End 2022, on the WIOA primary indicators of performance for Monroe County. Lee reviewed the 5 different Primary Indicators of Performance that we are measured on, which are county-wide measures. Lee shared really good news here in that we passed every single Adult and Dislocated Worker Performance Measure—and not just passed, but we exceeded the goal on all of them. Lee commended the hard work of all managers and staff that work at our three career centers. Performance is summarized in the Workforce Innovation and Performance Committee slideshow.

**Review of PY 2022 Programmatic Monitoring Reports and New Monitoring Process:**

Lee Koslow noted that with programmatic monitoring reports, every quarter we pull data and look at files which are a sampling of the participant records at our 3 Career Centers and with our Business Services Team participants. We look at a number of different data-related elements, testing compliance with the law, the regulations, and the state technical advisories. Anything that is not in compliance would generate a finding, for which the career centers and the different departments would have to submit corrective action. The Workforce Innovation & Performance Committee oversees Adult, Dislocated Worker, and Trade Act performance, and this is the system's accountability to the Workforce Development Board, through this committee. Results of file monitoring reviews for Program Year 2022 are summarized in the Workforce Innovation and Performance Committee slideshow.

Lee proceeded with a discussion on changes to the participant file monitoring process, beginning with the current program year. As we have been seeing many of the same errors over and over again, our new procedure will focus on identifying and addressing the root cause of these findings. We will conduct quarterly desk reviews that do not require corrections. We will then conduct a formal monitoring review once each year. On-site monitoring reviews will begin in February 2024. We will conduct an entrance conference, making use of the quarterly desk review results. We will then interview select staff and take a look at some processes. At the end of the review, we will conduct an exit conference. When writing monitoring reports, we will group multiple errors together into one finding, which will result in a reduction in the number of findings reported.

When it comes to monitoring, we will be looking at 5 different domains, including Eligibility, Performance, Data Entry, Data Element Validation, and Equal Opportunity compliance. We will also look at making sure we are keeping Personally Identifiable Information (PII) confidential and secure.

## **Featured Discussion: What should we use for our new local priority category for training services?**

Lee Koslow began this discussion by reviewing elements of Policy 101, Priority of Service. The discussion included, what should we use for our new local priority category for training services, and why do we need a new local priority category for training services? We are looking at some revisions to Policy 101 Priority of Service and we would like to make recommendations for revisions to the Board at their next meeting.

The purpose of the revisions will be to respond to changes in NYSDOL Technical Advisory (TA) #23-06, Initial Assessment in the Career Center System. The new TA removes the requirement to determine a participant as in need of either Job Search Ready Services (JSRS) or Career Development Services (CDS). The CDS determination has given participants local priority for individualized career services, on-the-job training (OJT), customized training, and transitional jobs. Since the CDS determination no longer has a basis in state policy, we are seeking an alternate local priority category that achieves a similar result.

Lee reviewed the Factors Leading to a CDS Determination, as summarized in the Workforce Innovation and Performance Committee slideshow. We are not making a CDS determination anymore, but maybe we could use some of the factors that led to that determination to help us come up with a new priority category. The committee reviewed these factors, along with how easy it is to make the determination.

Lee also introduced one change that we are hoping the committee will agree with, to make things less burdensome on the Business Services Team. Whereas our local priority was a gateway to OJT Grants or Work Experience Tryouts (also known as transitional jobs) up until now, these services already have existing eligibility criteria. The change that we are proposing is to no longer make priority of service a gateway for OJT or work experience tryouts. It would simply be a designation resulting in earlier or more prompt delivery of the service, just as we do for individualized career services and customized training (when we offer it).

Lee opened up the meeting for discussion on the factors we think we should choose for our new local priority to replace the CDS determination. Discussion/comments included:

- Regarding the chart of Factors Leading to a CDS Determination, it is difficult to decide on which one is a priority, as the feeling is they are all a priority, depending on the individual and the situation.
  - Lee responded that we can have multiple priorities if we think that they are relevant, or we could find some way to group them together into a single priority category. When considering the priorities, if we do have multiple ones, it may make sense to have one type of priority that is more barrier-related for individualized career services and a different type of priority that is more skills deficiency-related for some of the training services.
- Does this apply to the Enhanced Recovery Services Program?
  - Lee responded that to the extent that we are funding these long-term work experiences with non-WIOA funds, which we are, no it does not. To the extent that we are providing individualized career services with WIOA funding, it does. It is not going to exclude anyone because we have never excluded anyone from individualized career services.
- Looking at the Lacks Job Retention Skills factor, isn't that the point to help somebody become employed and keep that employment? Could that be a priority, in a sense, for worker retention? Are some individuals not able to retain their jobs because of another factor on the list, such as Child Care Barrier or Transportation Barrier?
- Regarding barriers, how do you pick just one in terms of identifying who receives priorities? Could we create a catch-all? From the perspective of Business Services Grants, including OJT and Work Experience Tryouts, also known as transitional jobs, we like the idea of creating a separate designation for that, just because we already have eligibility criteria for those services.
- Lee added that we do not have to replace the CDS local priority designation. We do not have to have local priority designations at all for these services.

- Should Health Barrier and Digital Divide Barrier be added to the list? These are some things that we talk to customers about. Some individuals may have health barriers, but they may not view it as a disability.
  - Lee noted that we do not want anyone with a Health Barrier or a Digital Divide Barrier excluded because they do not meet the priority considerations.
- Lee noted the changes that we are proposing to make for the priority for OJT and Work Experience Tryout, which will eliminate the priority of service gateway for anyone who does not have the other barriers. The only other services for which there is a priority of service gateway are ITA Training or Supportive Services. It may be a good discussion to have with Staff. Are they seeing individuals with Digital Divide Barriers or Health Barriers who are getting excluded from ITAs and Supportive Services? If so, then maybe at a future meeting we could consider making a change to Policy 101, to break down that exclusion or barrier.
  - Note: This could be brought up either at a Comprehensive Assessment and Skill Development team meeting, inviting in addition to Renee, anyone else on the Waring Road counseling team and/or Randy to participate if they want to, or we could have a separate meeting as well.
- For those who are chronically unemployed, I think we have to consider the reasons behind why they are chronically unemployed and what particular soft skills they need in order to stay employed. What else can we do to prepare that individual to stay at a job if these barriers are preventing them from getting to the job? Is it childcare or transportation? Giving them the skills that they need to overcome those barriers before they enter a training program. There are workshops out there, such as 5 Steps, that address those things, and maybe it is a requisite for those that have that particular history, maintain them as a priority population, but also before we prepare an ITA for the individual, have them go through this and think about the things that caused them to lose employment previously.
  - The Business Services team noted that the chronically unemployed designation is used exclusively for their Work Experience Tryouts/Transitional Jobs Programs. These programs give those individuals a short-term opportunity to hopefully demonstrate that they have addressed those issues. Supportive Services are offered as well.
- Lee noted a theme in this discussion that when it comes to these different barriers that might prevent someone from getting or keeping a job, we may want to take a look at how we are addressing them through services, especially in light of the fact that it seems that more and more of the participants we are seeing have these barriers.
  - Note: Lee would like to have further discussion on this topic at our March WI&PC Meeting.

Lee furthered the discussion by asking the group “What if we did not replace the CDS determination at all and just decided that we do not need an additional local priority category?” Comments included:

- The Business Services Team is already serving a lot of individuals with the barriers we have discussed, as they meet the eligibility requirements for OJTs and work experience tryouts.
  - Lee commented that what he is hearing is, for business services, such as OJTs, work experience tryouts, and customized training (if and when we offer it), we may not need an additional local priority category.
- Lee next asked about individualized career services. Having a local priority category might keep it in staff’s mind who they want to spend more time with, and who they might want to just limit to basic career services. Do we need a replacement for CDS for individualized career services? Suggestions/comments included:
  - The thought is that we do not need a replacement as the criteria here are pretty well outlined and these things will be covered in a comprehensive assessment anyway.
  - We have to think of the individuals that are coming to the career centers. Many are coming in because there is a barrier in some way, shape, or form. They need assistance and there is probably some challenge; otherwise, if they could do it themselves, they would be doing so.
  - The type of customers coming into the career center has changed drastically compared to pre-Covid. We are seeing more and more individuals with these barriers.

A motion to recommend to the Board that we 1) remove the CDS local priority designation for individualized career services, OJT, work experience tryouts, and customized training from Policy 101, not replacing it with any local

priority designation, and 2) allow OJT and work experience tryout participants who do not meet any federal or state priority criteria to receive the service after participants who do meet the federal or state priority criteria was made by Kyle McCarthy and seconded by Jarmani Dozier. The motion was passed unanimously.

A motion to adjourn the meeting was made by Lia Festenstein and seconded by Patricia Stovall-Lane. The motion was passed unanimously.

Lee thanked everyone for the very good discussion today.

**Next Meeting Scheduled:** March 5, 2024

Meeting adjourned at 9:02 AM

Submitted by: Mary McKeown

Reviewed by:

Lee Koslow 12/13/2023