



Agenda for April 28, 2026 Meeting
Capital Region Workforce Development Board Executive Committee

Virginia Career Works Richmond West Center
4914 Radford Avenue, Room 100
Richmond, VA 23230
12:30 pm – 2:00 pm

- I. Call to Order and Welcome - Chairman Ilene Maurer
- II. Public Comment
- III. Minutes from the August 26, 2025 Meeting.....Page 1
- IV. **Action** - Transfer of PY25 Dislocated Worker Funds to Support Adult Program Activities...Page 4
- V. **Action** - Policy Revisions (Carried from March 12, 2026 full Board Meeting).....Page 8
 - a. Policy 102 – On-the-Job Training.....Page 11
 - b. Policy 105 – Eligible Training Provider Certification Process.....Page 15
 - c. Policy 106 – Access to Participant Training.....Page 21
 - d. Policy 110 – Self Sufficiency.....Page 26
 - e. Policy 115 – Business Service Tiers.....Page 28
- VI. **Tentative Action** - Adult and Dislocated Worker Contract - Concurrence on Procurement Committee Recommendation/Notice of Intent to Award.....Page 30
- VII. Working Committee Updates
 - a. Continuous Improvement
 - b. Programs and Operations
- VIII. Executive Committee Adjourns



**Capital Region Workforce Development Board Executive Committee
and
Capital Region Workforce Foundation Joint Meeting Minutes for August 26, 2025**

Members Present			
	Executive Committee	Foundations Members	Staff
1.	Maurer, Ilene, CRWDB Chair	Ilene Maurer, President	Brian Davis
2.	Auchmoody, William	William Auchmoody	Krishawn Monroe
3.	Easter, John	Hinton, Brandon (Henrico)	Carla Cosby
4.	Gilbert, Danielle		Mychael Lee
5.	Shreve, Tina		
6.	Stamper, Eric		
Members Absent			
1..	Drexel Harris, CRWDB Vice Chair		

Capital Region Workforce Development Board Executive Committee

- I. Call to Order and Welcome - Chairman Maurer called the meeting to order at 12:06 p.m.
- II. Public Comments. No persons were present for public comment.
- III. Minutes from the January 12, 2024 Meeting. Mr. William Auchmoody moved to accept the minutes as presented; Mr. Eric Stamper seconded the motion. The motion carried. Ms. Maurer noted that the last meeting was in 2024 and suggested that the draft minutes sooner while information is still fresh.
- IV. Transfer of PY24 Dislocated Worker Funds to Support Adult Program Activities After review of the budget item, Mr. William Auchmoody moved to accept the recommendation to transfer funds dislocation funds to support adult program activities; Ms. Tina Shreve seconded the motion. The motion carried.
- V. There being no further Executive Committee business, the meeting adjourned at 12:13 p.m.

Capital Region Workforce Foundation

- I. Call to Order –Chair Ilene Maurer called meeting to order at 12:18 p.m.
- II. Affirmation of Officers Identified in Lieu of an Organizational Meeting. Initial officers are President Ms. Ilene Maurer, Vice-President Mr. Drexel Harris, and Treasurer/Secretary, Mr. William Auchmoody. Executive Committee members are all members of the Foundation, along with a Henrico County representative named by the County.

III. Review of Organizational Items

- Articles of Incorporation have been approved
- Tax exempt status and employer identification number has been issued by IRS
- VA Department of Agriculture and Consumer Services (VDACS) will review initial application and grant approval to raise funds in VA.
- The registered agent is Sands Anderson. Preliminary year is covered as part of organizational fees.
- The Foundation is structured similar to SkillSource Foundation. The nonprofit will establish a bank account, after registration with the State Corporation Commission.
- The purpose established in the Articles to advance workforce development. To do so, the Foundation can raise funds, seek grants, hire staff and work with other nonprofits.
- The Foundation Board is comprised of the Executive Committee of the Workforce Board. The Henrico County member will have a two-year term until a replacement is selected. The County assigns this appointee. (Currently Brandon Hinton). There is a provision to elect additional directors – at large. They would have a two-year term.
- Bylaws establish a fiscal year as term July 1 – June 30
- Public notice of meetings is not required for Foundation
- Committees can act on the authority of the full Board unless otherwise notified
- No compensation for Foundation members. If serving in different role, can be compensated

IV. Adoption of Initial Budget. An overview of various budget items was presented.

- Initial budget is \$40,000 for direct services.
- No money established for start-up and administrative costs. The executive director will request startup cost of \$10,000 be allocated from the CLEO budget for FY27. Mr. Hinton supports the idea if all the jurisdictions supported this initiative. Expenses would support:
 - nonprofit consultant
 - directors and officer's insurance
 - website and logos, etc.
- Federal and nonprofit funds will not be co-mingled, which was a past concern.

Awareness and Outreach Strategy

- a. Identify measures to inform the community the Foundation exists
- b. Ms. Gilbert encouraged the team to develop a shorter mission statement and elevator speech
- c. Launch specific fundraising priorities targeting outreach
- d. The Foundation members discussed next steps. Ms. Gilbert suggested a consultant and encouraged the establishment of the bank account, logo,

website development, and all the other items to make the Foundation a legitimate business that people and potential funders can review who we are and what we are working on/seeking to advance. Ms. Maurer stated her employer might be able to assist in some start up activities.

- V. Foundation Adjourns. The meeting adjourned at 1:25 p.m.

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Agenda Item IV.

Capital Region Workforce Board Executive Committee
Agenda Item Summary: Transfer of Dislocated Worker Funds

What is it?

The Workforce Innovation and Opportunity Act (WIOA) funds are allocated to local areas each year in three separate funding streams: adult, dislocated worker and youth. The programs funded under each stream carry different eligibility requirements and may only be used to support services and activities attributed to that program. Up to 10% of each funding stream may be set aside for administrative purposes. The federal law grants local areas the flexibility to transfer up to 100% between the adult and dislocated worker with state approval, recognizing that program needs may vary locally from year-to-year. (Funds may not be moved into or out of the youth program.)

What do Members Need to Know?

- 1) Funding Levels and Balances** – In each year, federal funds are available to spend in the year awarded and in the following year before any unspent amounts are recaptured. In the current program year (PY25), the local area was awarded **\$1,721,625 in adult funds** and **\$1,102,690 in dislocated worker funds**. For the prior year (PY23), the awards were \$1,561,903 for adult and \$1,144,449 for dislocated worker. As of the March 2026 Cash Payment Schedules filed with the state the following balances were available:

Year	Adult	Dislocated Worker
PY24	0	\$201,985
PY25	\$969,750	\$972,662

Cash balances on file with the state do not factor contractual and other obligations that are budgeted as not available to spend, such as service provider contracts, rent and salaries/benefits.

When factoring such obligations there is a 0 balance of PY24 adults funds unencumbered and \$541,782 dislocated worker funds held in reserve as of March 31, 2025.

- 2) Program Distinctions and Similarities** - The basic eligibility requirements for both adult and dislocated worker are that an individual be 18 or older, eligible to work in the United States, and registered with selective services. Once basic eligibility has been established, for adults, the distinction is that priority must be given to those who are low-income or basic skills deficient. For dislocated workers, the distinction is that it must be documented that the individual lost their job through no fault of their own. (A documented layoff notice, plant closure, verified recipient of unemployment benefits etc.). In both programs, Veterans who also meet either eligibility category receive priority.

Regardless of the program, the services offerings are the same for both programs, and they are delivered by the same service provider, Equus Workforce Solutions.

- 3) Demand for Services:** - Each year that a contract is awarded to Equus, the associated budget is delineated between adult and dislocated worker funds. Equus then has responsibility for ensuring that enrollments and services are tracked by and charged to the appropriate funding stream. The monthly billing in this fashion allows the Board to meet its requirements for tracking and reporting to the state. Best estimates are used by the Board staff in consultation with the contractor on how to divide the budget at the start of each contract year. The estimates though cannot predict what customers will actually present for services during the year and under what eligibility they may be qualified.

In the current year contract, the budget was split at 80% adult and 20% dislocated worker. In terms of dollars that set the budget at \$1,440,000 adult and \$360,000 dislocated worker.

- 4) **Program Enrollment Trends** -Prior to 2020, the local program demand between adult and dislocated worker, while never even, ran at about 60% adult/40% dislocated worker. For the four most recent full years, the ratio shifted even more to adult and necessitated that fund transfers be utilized in a now ongoing basis. In the last program year, dislocated worker demand drooped to levels equating to less than 20% of customers, and is on track to stay below 20% in this year.
- 5) **Current Situation and Request** - After three quarters of this current program year, the actual ratio of enrollments is 86% adult and 14% dislocated worker.

Factoring contractual obligations, expenditures through March and known expenditures through June 30, 2026 such as rent and staff salaries/benefits, the balances of funding on hand would be: **Adult – \$67,769 and Dislocated Worker - \$603,229** . Based on contractor spending trends in the first three quarters of the year, staff has determined that a transfer of \$400,000 would retain a balance sufficient to meet dislocated worker demand while allowing adult service continuity as well as ensuring no funds would be recaptured at the end of PY26.

What do Members Need to Do?

Consider authorizing staff to request from the state approval for a transfer of up to \$400,000 in PY25 dislocated worker funds for adult program use. Additional analysis in the form required by the state is attached.

Note: This transfer was endorsed by the CLEO at the April meeting, but the state requires proof of Board action.



The Capital Region Workforce Development Board (WDB) – Local Area 9 is requesting a transfer of \$400,000 in PY25 dislocated worker funds to support adult program expenditures. The information below conforms to state administrative requirements per VWL #16-02, change 2.

Date:	April 28, 2026	
WIOA Program and Year Affected	PY 2025 Dislocated Worker Funds	
Amount of Requested Transfer	\$400,000 to PY 2025 Adult Program	
A detailed analysis indicating the anticipated impact to the program from which funds are being moved and to the program which will receive the funds, including at least “three-year” trend analysis.		
Data Support: Expenditures	Adult	Dislocated Workers
PY21	\$1,439,446.50	\$1,141,691.40 <u>(Note: \$475,000 of this amount was for adult expenses after a transfer, which makes net DW spending \$666,691, or 26% of the total spent)</u>
PY22	\$1,616,390.10	\$1,041,084.90 <u>(Note: \$300,000 of this amount was for adult expenses after a transfer, which makes net DW spending \$741,084.90)</u>
PY23 <i>Note: These YTD figures reflect spending as of Feb. 2025, to include most recent vendor invoices paid</i>	\$1,598,477.40	\$944,498.33 <u>(Note: \$458,498.83 of this amount was for adult expenses charged to dislocated worker funds after a transfer, making the new DW spending \$485,999.50)</u>
PY24 <i>Note: These YTD figures reflect spending as of March 31, 2026, to include most recent vendor invoices paid.</i>	\$1,405,712.70	\$904,624.20 <u>(Note: \$624,620.10 of this amount was for adult expenses charged to dislocated worker funds after a transfer, making the new DW spending \$280,004.10)</u>
PY25 YTD – Ratio is 17% dislocated worker dollars out of 100 spent	\$735,338.04	\$146,635.04



Participant Data:

	New Enrollments				Total Active			
	Adult	DW	Total	% DW	Adult	DW	Total	% DW
PY25 (as of 3/31/25)	168	26	194	13%	307	49	356	14%
PY24	259	42	301	14%	413	73	486	15%
PY23	306	65	371	18%	428	109	537	20%
PY22	264	94	358	26%	403	126	529	24%
PY21	230	56	286	20%	337	113	450	25%
PY20	131	77	208	37%	188	127	315	40%

Narrative on benefit to adult program and impact to dislocated worker program

As evidenced in the above data, historical trends show that adult program enrollments have surpassed that of dislocated workers year after year going back at least 5 years. Prior to PY20, new and active dislocated worker enrollments hovered at about 40% of the total served which was more manageable in terms of balancing spending between programs. But in each of the years since, and now through three quarters of the current year, dislocated workers continue to steadily drop. In PY24 only 14% of new enrollments and 15% of the active caseload were dislocated workers. Because spending is dictated by enrollments, it is logical that we would have a need to transfer funds to reflect customer demand.

Since the economic recovery following the early days of the COVID pandemic when unemployment reached approximately 11% in the region, our unemployment rate has hovered at or near the 3% rate which most economists consider “full employment”. By and large, our region has not experienced mass-layoff events, or events that have flooded the demand for our services. While there is some evidence of slowing of job posts by employers, the numbers continue to exceed the number of people counted in the official unemployment rate.

The majority of those seeking services do not qualify for the dislocated worker program due to the eligibility requirements. If they may have qualified as a dislocated worker at some point in the past, they have since “lost” the factors that may have made them eligible. That these individuals are not actively participating in the labor market suggests they may have greater barriers to achieving and retaining employment that leads to self-sufficient wages. Rather than turn these individuals away, they continue to be enrolled as adults. And funding at all levels follows the characteristics of the customer as they present and it is difficult to predict what that will be from year-to-year. Based on five years of enrollment and trend analysis, logic suggests that this transfer request would not negatively harm dislocated worker needs in the region at present.

We hope to be able to take advantage of the state workforce partners who have more direct access to the unemployment recipient records they possess in more proactive and meaningful ways to connect to our Title I dislocated worker program. Until then though, a transfer is the best way to meet current needs.

Documentation that the transfer decision was approved at a meeting of the Local WDB	Attached
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Respectfully,

Brian K. Davis, Executive Director

Agenda Item V.

**Capital Region Workforce Development Board Executive Committee
Agenda Item Summary – Service Policy Revisions**

What is it?

Under the Workforce Innovation and Opportunity Act (WIOA), the Workforce Development Board (WDB) has responsibility for developing and adopting policies that locally govern the operations and service delivery aspects under its purview. Certain policies are required under federal provisions in the WIOA, and others are permissible. In either case, the local WDBs generally have some amount of flexibility in the design of policy, provided it is not contrary to or less restrictive than what Federal or state guidelines establish.

What do Committee Members Need to Know?

Often, changes to local policies are required when there are changes in federal regulations or new guidance issued, or when there are new or revised state policies that require adjustments locally. In addition, it is a good practice to review policies on occasion to make sure they are kept contemporary to WDB thinking and preferences.

At this time, five existing policies are being brought forth for review with some staff recommended revisions for consideration, and to prompt WDB discussion.

A. Policy #102 – On-the Job Training (OJT)

OJT is a form of work-based learning permissible with WDB funds wherein a WIOA participant is hired into employment with a training plan developed in concert with the employer. During the defined training period, the employer is reimbursed a percentage of the wages while the new hire is completing the job-specific training. The policy was originally adopted in 2017 with revisions in 2021 and 2023.

Suggested revisions:

- General clarifying language and contemporary reference updates throughout. **(Grammar or clarification that does not change substance).**
- Adding a reference to the new Virginia Board of Workforce Development High-Demand Occupation list at the bottom of page 1. This would align OJT placements to that list. **(State preference that this list be used).**
- Language on page 2 to clarify living wage requirements for OJT contract amounts, and for alignment with the Business Service Tier policy. **(Local preference and clarity with other policies)**
- Deleting the current industry target chart on page that sets contract amounts based on certain demand indicators. **(Local preference.** Reasoning being that an OJT is supporting a job in demand by its very nature).
- Adding language on page 3 that an employer may use “reverse referrals” by sending a potential hire to a center for eligibility determination. **(Stating in writing a practice that is allowed/occurs)**
- Added language on page 3 that a company can’t have people in the same position in a layoff status in the past 120 days. **(Federal requirement)**
- Removing reference to Virginia Community College System on page 4. **(That agency no longer has a state-level WIOA role).**

B. **Policy 105 – Eligible Training Provider Certification**

The Eligible Training Provider List (ETPL) is a required vehicle for WIOA participants to access occupational skills training either in a classroom or virtually through staff issuance of training vouchers to cover the cost. Before vouchers, known as Individual Training Accounts or ITAs, can be issued, staff must verify that both a provider and the desired training program are listed on the ETPL, which is web-based and maintained by the State.

Historically local areas had to manage a largely manual process where applications were received and reviewed locally, and then once approved by the local board, staff had to key in information to the State's ETPL system. In December of 2025 the Virginia Board of Workforce Development adopted revisions to state policy 404-01 making significant process changes. The suggested local revisions incorporate the following for purposes of conformity:

- Applications will now be submitted online through the state ETPL system.
- The state will have responsibility for initial application review to ensure all required materials and information are captured and then refer the applications to the local area where the provider is located. The local area has 90 days from receipt to conduct any local review and then communicate its recommendations back to the state.
- Subsequent renewals as well as processing of any appeals for denial determinations will all be managed by the state.
- One area of local preference would be that a designated committee of the Board would be the local group to review and convey recommendations back to the state, as opposed to the full Board. The old state policy required full Board action, but now this committee-level flexibility is allowed and could afford for a more streamlined and faster process since committees meet more frequently than the full board. The current committee for this task would be Continuous Improvement, and they would follow the Board-defined parameters.

C. **Policy 106 – Access to Participant Training Vouchers**

Training vouchers, or ITAs as defined above, are the mechanism by which WIOA staff can pay training costs incurred on a customer's behalf, with payment going directly to the provider. Local areas have wide discretion in what factors can be considered before the issuance of the ITA. This policy, originally adopted in 2016, defines the factors applicable to the Capital Region. Suggested revisions include:

- Grammar and terminology changes throughout.
- On page 2 addition of new funding sources that did not exist prior, and removing a source that no longer exists.
- A "collapsing" of the current four-tiered levels of training cost caps to two. This still drives funds to occupations in demand but streamlines the process for staff.

D. **Policy 110 – Self-Sufficiency**

Self-sufficiency is a term that is applied when a customer who is already employed seeks training services. The federal requirement is that in such cases, the employed customer wages must be below the self-sufficiency level as locally defined.

In alignment with other wage considerations, the local method in place is using the MIT Living Wage calculator to determine self-sufficiency. The only changes to this policy would be to clarify self-sufficiency is not used for eligibility (page 1), and to remove related confusing and unnecessary language on page 2.

E. Policy 115 – Business Service Tiers

This policy was originally adopted in 2018 as a way for the local board to tie business services, which are not required, to jobs that pay self-sufficient wages. The idea is to tier services such that higher-value services are reserved for living-wage job supports. Again, the MIT Living Wage calculator is the tool staff must use to make determinations. Suggested revisions include:

- Changing job posting assistance and job fairs/hiring events from a Silver-level service to a Bronze-level service. (Silver level requires wages at least 75% of the living wage). For context, that would equate to \$17.52 an hour for one person in Richmond. The state's minimum wage requirement will soon be \$15 which closes this gap and so this is simply a debate point for the board.
- Removing reference to Network 2 Work job postings. (The program is no longer supported by the local area).

What do Committee Members Need to Do?

Review and discuss the suggested revisions and vote either in a block or individually as far as what to adopt. These actions do not go to the Local Elected Officials and would be final. *(Note: This item was on the Board's March 12th agenda, but a quorum was not established. However, all members have had benefit of seeing the items).*

Capital Region Workforce Development Board (WBD)
Workforce Innovation and Opportunity Act (WIOA) Service Policy #SP 102
On-the-Job Training (OJT)

References: Workforce Innovation and Opportunity Act (WIOA), Final Rule, Section 134(c) (3)(h), 20CFR 680.530, 20 CFR 680.700 -20 . CFR 680.740

Date: **Revision #3, March 12, 2026.**
 Updates Revision #2, January 11, 2023, :Revision #1, September 23, 2021; and Original, December 15, 2017;

Purpose:

To establish requirements and limits for the use of OJT as a tool to connect enrolled WIOA jobseekers into work-based learning opportunities where they earn wages while obtaining job-specific skills identified by the employer.

Policy Statement:

The Capital Region Workforce Development Board recognizes the value of OJT as an effective ~~employment and training tool~~ work-based learning activity that supports needs of both the employer and job seeker. This policy shall outline the definitions and other details for use by contracted service providers in developing and executing OJT opportunities in the Capital Region.

~~Definition:~~ Policy Framework:

The term "~~on the job training~~" (OJT) means:

~~OJT is defined as training provided to a WIOA participant who has been hired into employment with a contract developed to meet the employer-defined needs while making the individual proficient in the position. by an employer to a WIOA-referred and hired-enrollee who is hired and will be paid by the employer while the employee is engaged in learning specific skills related to the job for which he/she was hired.~~

~~OJT will require a written agreement. The contract is to be developed~~ between the Virginia Career Works program provider and the employer ~~which and~~ details the specific and agreed upon training period and identifies the specific knowledge, skills and capabilities the ~~trainee-new hire~~ will learn in order to achieve full and adequate performance on the job.

The ~~OJT Agreement contract~~ further stipulates the portion of the trainee's ~~salary-wages~~ that the employer may ~~be~~ reimbursed ~~as for~~ the extraordinary cost of providing training and additional supervision to the trainee.

OJT placements should be limited to occupations which align with the Virginia Board of Workforce Development's most current regionalized High Demand Occupation List maintained by the Virginia Office of Education Economics

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Duration of OJT Activities:

OJT ~~agreements~~ contracts will be written to the period of time required for the employee to become proficient in the job for which the training was designed. No agreement or series of agreements for one individual combined should exceed more than 1,040 hours (26 weeks).

In determining the appropriate length of time of the training, consideration will be given to the skill requirements of the job, the academic and occupational skill level of the employee, the prior work experience of the employee, and the participant’s individual service strategy.

Program provider staff will use the Dictionary of Occupational Titles Standard Vocational Practices code as the guideline, or other similar resources, in determining the duration of an OJT training period. The methodology must be documented in the ~~case file~~ participant record.

Payment of the Agreed Upon Reimbursement to the Employer:

Employers will be reimbursed in accordance with the agreed upon individual contract amount based on the hourly wage of the ~~participating~~ employee. The starting Minimum wage rates should ~~meet or exceed the regional~~ be at least 75% of the living wage for the locality as set by the MIT living wage calculator in order for the employer to receive a maximum of \$5,000 in wage reimbursement. Wages that are at or above the Living Wage can receive a \$10,000 maximum wage reimbursement. The living wage rate should be verified at the time of writing of the contract and based upon the family size of the employee.

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~~Contract amounts will be limited to maximum reimbursements as follows, unless a waiver is granted by the Workforce Development Board Director. Contracts written prior to the latest revision date of this policy may be honored:~~

<u>Occupations related to:</u>	<u>Maximum Amount</u>
<u>Tier I Targets: Educational Services; Healthcare; Manufacturing; Professional, Scientific and Technical Services and Transportation and Warehousing (logistics)</u>	<u>\$10,000</u>
<u>Tier II Targets: Administrative and Support; Construction; Finance; Hospitality and Retail</u>	<u>\$9,000</u>
<u>Occupations for which the Virginia Employment Commission projects at least 1% annual growth; or those supported by a recent economic development announcement</u>	<u>\$6,000</u>
<u>Occupations supported by a written letter from an employer committing to hire</u>	<u>\$5,000</u>

Employers with more than 50 employees ~~will~~ may be reimbursed up to 50% of wage costs. Those with 50 or fewer employees may be reimbursed at a rate up to 75%.-

To request the reimbursement, the employer will need to send the appropriate time record or other verifiable payroll records and documentation including signatures of the employer

and employee for each month or week of participation depending on the duration of the training. Progress reports will also be required to and a statement of document the employee's progress made in achieving proficiency per the contract.

Eligible Employees:

OJT is limited to those workers who:

- (a) Are a WIOA participants newly hired by the company employer from program referrals who require on the job training as the means of learning the job for which they were hired. The individual hired must have a WIOA Individual Service-Strategy Employment Plan which identifies OJT as the most appropriate training methodology for the individual and the activity has been properly entered in the VOSVAWC system
- (a)(b) An individual being considered for hire that is referred to the WIOA service provider by the employer for determination of WIOA eligibility and enrollment; or
- (b)(c) An individual already employed by the employer that is not earning a "self-sufficient wage" as determined by the Capital Region Workforce Development policy #110, and for whom newer or enhanced skills will result in promotion and/or higher wage employment opportunities within the same company.

Eligible Employers:

- (a) May be public, private non-profit or private for profit
- (b) Must have the personnel to provide adequate supervision and training
- (c) Must be willing to provide the agreed upon hourly training wage and agree to continue the trainee as an employee after the training period has ended.
- (d) Must provide the benefits and working conditions at the same level and to the same extent as other trainees or employees working a similar length of time and doing the same type of work
- (e) Must not have a history of or pattern of failing to provide OJT trainees with continued long-term employment with wages, benefits, and working conditions that are equal to those provided to regular employees who have worked a similar length of time and are doing the same type of work.
- (e)(f) Must not have workers in a layoff status in the same position as the OJT within the past 120 days.
- (f)(g) Must not have relocated from any location in the United States within 12020 days, if the relocation resulted in any employee losing his or her job at the original location, and
- (e)(h) Must not use OJT assignments to displace regular employees, or to replace any employee on layoff.
- (h)(i) Must be willing to enter into a written agreement for the training that must include an outline of the competencies/skills to be taught and mastered as a condition of the OJT activity for each employee participating, and

~~(i)~~ Must be willing to submit a monthly time record and information about the progress of the employee in completing the training to secure the OJT reimbursement.

Performance Information:

The program operator will be required to provide performance information by company and number of participating employees monthly to the Workforce Development Board.

This information will be used to provide information to potential enrollees about the OJT activities, and will be used by the customer to make decisions about the type of training they would like to access.

Approval Determinations and Appeals:

OJT is not an "entitlement" service. The local board director or contracted service providers may deny or alter ~~approval of~~ any submitted request for OJT assistance from an employer. Written reasoning must be provided as to the basis for denial.

Upon receiving such denial or notice of alteration, an employer may file an appeal within 30 days receiving notice to the Workforce Development Board for consideration at the next regularly scheduled meeting of the Board.

Should the Workforce Development Board uphold the staff/provider decision, the employer may file appeal with the State's ~~Director of~~ WIOA Title I ~~Program Administrator, Administration and Compliance at the Virginia Community College System. (Or any successor with such authority).~~

**Capital Region Workforce Partnership
Workforce Development Board
WIOA Service Policy #105**

Eligible Training Provider Certification Process

References: Workforce Innovation and Opportunity Act of 2014; Section 122
WIOA Final Rule, 20 CFR Parts 680.400 - 500
Virginia Board of Workforce Development Policy #~~15-02404-01.2~~

Date: ~~_____~~ **Revision #3, March 12, 2026. Previous versions dated December 1, 2016 and September 23, 2021. December 1, 2016; Revisions Adopted September 23, 2021**

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Purpose:

This policy governs the Capital Region Workforce Development Board's (WDB) Training Provider review ~~and approval~~ process for consideration of inclusion of training programs ~~on~~ the Virginia Statewide Eligible Training Provider List (ETPL).

Background:

The Workforce Innovation and Opportunity Act (WIOA) seeks to promote a training environment that fosters performance accountability, attainment of skills, credentials, certificates and diplomas that lead to employment in occupations in demand in the local economy and thereby; enhancing quality of life for customers.

The ETPL is the training provider list that must be used to issue Individual Training Accounts for the training of WIOA-enrolled participants when a determination has been made that training is needed to meet the customer's employment and earnings goal. The enrollee can compare the offerings on the ETPL and, with the consultation and advice of Workforce Center Staff, select the ~~best training program for their individual needs~~ most suitable training option.

I. Program of Training Services Defined:

~~Capital Region Workforce Development Board and Virginia Board of Workforce Development have For purposes of the WIOA, defined~~ a program of training services is defined as one or more courses or classes, or a structured regimen that leads to a recognized post-secondary credential, secondary school diploma or equivalent, employment, or measurable skills gains towards a credential or employment.

II. Eligible Program Applicants:

There are five categories of providers who can apply ~~to the Capital Region Workforce Development Board~~ for consideration to be included on the ETPL:

- A. A postsecondary educational institution that is eligible to receive federal funds under Title IV of the Higher Education Act of 1965 and that provides a program that leads to certification or license or college certificate, associate degree, or baccalaureate degree.
- B. A postsecondary school that offers formal instructional programs with curricula designed primarily for students who have completed the requirements for a high school diploma or its

equivalent. Such schools include programs of academic-vocational, vocational, and continuing professional education that may lead to a certification or licensure. This category excludes vocational and adult basic education programs.

C. An entity that carries out related instruction under the National Apprenticeship Act that is recognized by the Virginia Department of ~~Labor and Industry~~[Workforce Development and Advancement](#).

D. A provider of a program of occupational training services that under Section 23-276.2 of the Code of Virginia is exempt from SCHEV certification as a postsecondary school in the Commonwealth such as a professional or occupational training program regulated by another state or federal governmental agency other than the SCHEV, any school, institute, or course of instruction offered by any trade association or any nonprofit affiliation of a trade association on subjects related to the trade, business, or profession represented by such association.

E. A provider of adult education and literacy as defined in Title II of the WIOA, if such activities if approved to the list and utilized, are provided in combination with other occupational skills training and defined in the WIOA.

III. Other Considerations:

A. Providers and programs operating in Virginia under all categories shall submit an application ~~through an electronic portal developed and maintained by the Commonwealth of Virginia. (At the time of policy adoption, the portal is known as the Virginia Workforce Connection).~~

B. Programs and providers under categories 1 and 2 must provide evidence as part of their application that they are certified to operate in Virginia and that they have program accreditation/approval from an applicable state agency in order to be considered for approval. ~~by the Capital Region Workforce Development Board.~~

C. For Category 3 providers, a different application form is provided by the state. Such providers must be granted approval if the Virginia Department ~~of Labor and Industry~~[of Workforce Development and Advancement](#) verifies the sponsoring employer and related instruction have been recognized by the state and are in good standing.

Nothing in this policy shall preclude the approval of Bachelors or Masters level programs that otherwise meet these policy requirements.

IV. Other Possible Providers may Include:

~~A. —Distance and Online Training Providers. WIOA funds may be used for programs that are conducted in a completely online format. In these instances, training providers must be follow the same approval and renewal processes. Providers based outside of Virginia offering online courses and approved in that state must still make application for approval in Virginia.~~

~~B. —Out of Staff Training Providers (In Person Training). WIOA funds may be used for approved program from other states. Approved providers and programs based in other states are not required to complete an application for approval in Virginia. The training provider must be listed on a state maintained eligible training provider list from another state.~~

V. Applications for Initial Approval:

A. ~~To be considered for inclusion on the ETPL, The Virginia Department of Workforce Development and Advancement (Virginia WorksDWDA) must certify first determine the initial training provider application and all new program applications are complete with all minimum application requirements satisfied. Applications may be submitted at any time, but only those submitted at least 30 days in advance of a regularly-scheduled Board meeting will be considered at that meeting. Only completed applications using the forms required by the Commonwealth will be advanced to the Board and considered. All applications for the ETPL must be submitted through the Virginia Workforce Connection (VaWC), and should include: The training provider must submit an application, including a completed Equal Opportunity and Nondiscrimination Certification Form, through the provider services module.~~

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B. ~~All applicants will be subject to requirements outlined in Virginia WorksBoard of Workforce Development Policy 404-01.2 Training program applications must be submitted for each unique "program of training services" sought for approval.~~

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C. ~~If approved by the WDB, annual renewals will be required. Once Virginia WorksDWDA has verified that the application meets the minimum qualifications for consideration of inclusion to the ETPL, Virginia WorksDWDA will send application and supporting materials to the Capital Region Workforce board (CRWDB) for review and approval. The CRWDB will have 90 business days from notification notify the local area that application(s) have been routed for local review and consideration.~~

D. ~~In order to be reviewed and considered, the application must include responses to all fields of the state provided application, along with associated supporting documentation, addition to the requirements set forth by Virginia Works, t The In addition to state standards, the Capital Region Workforce Development Board also requires any programs seeking factors the additional elements in reviewing an application as follows: approval be either:~~

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- 1) Directly aligned with a targeted industry as identified by the Board, or
- 2) Directly aligned with a demand occupation on the Virginia Office of Education Economic high-demand occupation list or industry as identified by the Virginia Employment Commission, or
- 3) Directly aligned with occupations that have documented evidence of hiring which may include a recent economic development announcement, written letter from an employer committing to hire, job listings in the Virginia Workforce Connection with an incidence of at least 25 in the prior 12-month period, ~~and~~
- 4) Supported by a labor market survey submitted by the applicant that includes at least 20 regional employers, to include sufficient employer contact information for staff verification.

The Capital Region Workforce Development Board WDB reserves the right to not ~~approve~~ recommend approval of any training program applications that ~~is~~ are not determined to meet sufficient occupation demand in the Capital Region.

E. Non-Discrimination and ADA Compliance: Providers must be accessible to individuals with disabilities under Section 504 of the Rehabilitation Act of 1973 in accordance with the Americans with Disabilities Act (ADA). They must also have written policies and procedures in place to protect against discrimination on the basis of an individuals' race, color, religion, sex, national origin, age, political affiliation or belief.

VI. Initial Review Process:

~~A. Training provider submits application(s) to Board staff on the VaWC and is certified determined by Virginia WorksDWDA as meeting basic requirements. CRWDB will have 90 business days to take action review and make recommendations on applications upon a referral notification from the DWDA.~~

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~~A.~~

~~B. Staff reviews the application against requirements of this policy and provides information and a recommendation to the designated review committee of the Capital Region Workforce Development Board. designated review committee. (The applicant may be invited to the Committee meeting to make a presentation on their application and answer questions).~~

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~~B.~~

~~C. The designated Committee will make a recommendation o recommendation to approve or deny the application(s) based upon their review and provide notice of determinations to the DWDA. The committee will notify approval or denial the full Board of its action and reasoning.~~

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~~C.~~

~~D. If the Board elects to deny the training provider's program of Training Services and does not recommend it for inclusion on the ETPL, the Training provider will be notified in writing. Reasons for denial may include but not be limited to: incomplete application or information founds to be inaccurate; determination that program is not in demand based on criteria at V. D. above; the program is determined to not be universally accessible; or program does not lead to a credential. While cost alone is not a determining factor in the review process, the Board may factor cost during their review and note concerns. The CRWDB will provide written reasoning for its recommendations to approve or deny to the DWDA.~~

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~~D.~~

~~E. Provisional approvals – For cases where a participant has identified a program that meets the qualifications to be considered that is not currently listed and timing does not allow for a participant to start the training before wait until the next WDB committee meeting, the Executive Director may grant recommend a provisional approval until such time as the WDB designated next committee next meets to confirm or reverse approval. The Executive Director shall verify that all requirement considerations have been met.~~

~~A notice of denial will identify the specific program being denied and the reason(s) for denial. The notice shall also advise the applicant of its right to appeal the decision. The Board will review the applicant's request for reconsideration first at the local level, and if the issue is not resolved, the Commonwealth will review the appeal.~~

VII. Continued Eligibility

~~After each year that a program has been certified, a renewal verification must be completed directly with Virginia WorksDWDA. The provider must submit performance outcomes, update the provider and program specific information in the VaWC, and inform Virginia WorksDWDA of interest in being considered for renewal. All of the performance criteria can be found in Virginia WorksBoard of Workforce Development Policy 404-01.2.~~

~~The provider will be required to verify that all information and factors leading to the approval of the initial application remain in place, or to make any such adjustments as may be necessary to reflect the current conditions. Any verification that results in a change of circumstances from the original approval will require a review by the Board, who may elect to remove the program(s) from the list.~~

~~Programs seeking renewal must provide outcomes for all students in any class containing WIOA participants in the prior year to include:~~

1. ~~Training completion rate — 50% or more required~~
2. ~~Credential attainment rate — 65% or more required~~
3. ~~Entered employment rate~~
4. ~~Post-training earnings~~

~~Reporting shall be in the format and at the timing as communicated by the Virginia Community College System.~~

~~Performance in category 1 and 2 that does not meet or exceed the rates established by the state and identified above will be removed from the ETPL. If the provider maintains that there were extenuating factors beyond their control leading to failure to achieve the required outcomes, such reasons must be noted if such provider wishes to appeal to removal action.~~

~~In either case, a provider failing to provide the requested information within 90 days of receipt will automatically be removed from the ETPL.~~

VIII. Appeal Process:

~~The following shall apply to both providers whose initial program application is denied or those that are subsequently removed from the list for performance under Section VII. above.~~

1. ~~The provider shall have thirty (30) calendar days from the date the denial or removal notification was given to file a request for reconsideration to the Board. The appeal request must be submitted in writing and signed. At a minimum, the appeal must identify the training program and location(s) denied or removed and must clearly state the reason for the appeal.~~
2. ~~Within sixty (60) calendar days of receipt of the request for reconsideration, the Board shall review the request and issue a written decision that either upholds or reverses the original decision. Instances for a reversal may include, but shall not be limited to, an administrative oversight or instances where additional information submitted by the training provider changes the basis on which the original decision was issued.~~
3. ~~If the Board or its Executive Committee fails to act on the appeal request during the 60-day time period described above, the initial decision shall automatically be reversed.~~
4. ~~If the Board upholds its original decision, the applicant shall be entitled to pursue a state-level appeal as outlined in State Policy 15-02.~~

~~The training provider may appeal the decision to deny a program for inclusion on the ETPL or to terminate the inclusion of a program on the ETPL.~~

First Appeal Request: The training provider must file a written appeal within thirty (30) calendar days after the date of program denial or termination from the ETPL to DWDA. Appeals may be sent electronically to DWDA at WIOA-ETPL-Appeals@VirginiaWorks.gov. The subject line should read ETPL Appeal. The appeal must indicate the purpose of the request including identifying the training provider and program(s), information supporting the grounds upon which the appeal is sought, and any vital factors to support the grounds for appeal. A first level appeal must occur before the matter can be appealed to the VBWD.

Second Appeal Request: After receiving notice of the outcome of the first appeal request, the training provider may file a second level appeal by sending a written request to the Director of the VBWD. The written request must clearly state the training provider's desire to appeal the matter to a hearing and the reason(s) the training provider believes the outcome of the first level appeal was incorrect or inaccurate. The email must be sent

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within ten (10) business days after email notification was sent containing the outcome of the first level appeal. The VBWD shall consider an appeal at the next scheduled quarterly full VBWD meeting as long as the appeal is received at least thirty (30) days prior the full Board meeting. At the discretion of the Chair, the VBWD may call a special meeting to consider appeals. The VBWD requires that the individual who files the second appeal, or a designee, appear at the hearing to represent the training provider. If no representative(s) for the institution appears at the scheduled hearing, the institution may lose its right to the hearing. A representative of the LWDB, or other interested parties, may be present at any hearing.

During the appeals process the impacted training provider program(s) will be removed from the ETPL. During the appeals process, if eligibility is reinstated, DWDA will republish the training provider program(s) to the ETPL within five (5) business days from the final determination. Following the appeal, if a training provider program is denied initial eligibility on the ETPL, it may reapply as soon as the training institution addresses the reason for its denial on the list. Following the appeal, if a training provider is denied renewal on the ETPL for a substantial violation, the training provider must wait two years from the date of the final determination before reapplying to the ETPL.

**Capital Region Workforce Partnership
Workforce Development Board**
Workforce Innovation and Opportunity Act (WIOA) Service Policy #106

Access to Participant Training

References: Workforce Innovation and Opportunity Act of 2014; Section 134(c)(3)(F) and (G)
WIOA Final Rule, 20 CFR Parts 680.300 and 680.310

[Virginia Board of Workforce Development Policy 404-01, change 1](#)

Date: Revision #3 March 12, 2026, Revision #2 January 11, 2023. Revision #1 September 23, 2021. Original December 1, 2016

Purpose:

The policy conveys the means by which training resources within the Capital Region are allocated through the use of Individual Training accounts funded by WIOA and the manner in which customers can access such services.

Background:

The Capital Region Workforce Development Board (WDB) makes training assistance available to customers through funding provided under the Workforce Innovation and Opportunity Act (WIOA) through a variety of methods. Under the WIOA, ~~training assistance is primarily arranged through one such method~~ is the issuance of an Individual Training Account (ITA). Other arrangements are also permissible and are discussed under the "Exceptions to ITA" portion of this policy.

Consumer choice is a component of the training process under WIOA. However, customers are expected to work closely with ~~their case managers staff~~ in planning their employment future through the use of ITA resources in an informed manner. This should include, but not be limited to: skill, interest and ability assessments, labor market conditions and trends, training provider performance, program cost and current and future earning potential.

I. Eligibility for Training:

Customers enrolled in a WIOA program may access training services if after interview and consultation with ~~a case managers staff~~, and assessments as described in Section II., it has been determined that:

- A. They are unlikely to obtain or retain employment at self-sufficient wages through provision of career services alone,
- B. They are in need of training to obtain or retain employment leading to higher wages, and
- C. They have been determined to have the skills, qualifications and other supports in place to successfully participate in the desired program of training services.

II. Assessment Factors:

In order to accurately assess the customer's ability to be successful in the pursuit of training, the following list should be used by staff in their engagement with the customer during the development of their service plan:

- A. Customer's educational level;
- B. Previous skills training and exposure to or awareness of the desired field;

- C. Employment readiness level and engagement/responsiveness to assessments and service plan development;
- D. Career goals;
- E. Customer's aptitude and interest for the selected training, and tolerance to environmental factors and/or working conditions associated with the training;
- F. Availability, method of instruction and schedule and length of training. (For example, not all participants may be determined to be suited for or successful in virtual or remote only training. Such instance must be documented by staff in case notes);
- G. Cost of training;
- H. Financial ability of customer to undertake and complete training along with any ancillary costs;
- I. Potential for a customer to obtain employment that advances their earning potential beyond wages reported at the time of enrollment and towards self-sufficient wages as may be defined by the WDB;
- J. Physical assessment to determine any limitations that would preclude them from performing work for which participant is being trained;
- K. Criminal background check, if appropriate, to identify barrier crimes that would preclude participant from employment in identified occupation;
- L. Drug testing if it is likely to be required by the training provider or occupation as a condition of employment.

Previously administered assessments less than a year old may be used.

III. Coordination of Financial Aid:

Once determined eligible for training, ~~case managers/Career Coaches staff~~ should ensure that customers are aware of the additional resources that may be available for training assistance, such as:

- Pell Grants
- Veterans Education Benefits/Tuition Waivers
- Employer/Union Educational Assistance
- Senior Tuition Waiver
- ~~FAA Training Assistance~~
State-funded programs such as Fast Forward and G3

Board funds are only to be used for training assistance when it has been determined that eligible customers:

- A. Are unable to obtain such other forms of assistance, or
- B. Require assistance in an amount beyond that which the other forms of assistance will cover.

With respect to PELL, a customer may receive WIOA funding for training if a PELL application is in process and awaiting a decision. In such cases, the Board's contracted service providers must have arrangements in place with training providers to ensure that WIOA funds will be refunded once the PELL award is made.

IV. Other Considerations:

- A. Training may only be arranged for programs that are on the state Eligible Training Provider List (ETPL) at the time that training is arranged. (If a program is subsequently removed from the ETPL after enrollment, the customer may continue until completion).
- B. Training programs on the ETPL that are physically located outside the Capital Region may be considered dependent on logistical considerations such as the participant's demonstrated ability to incur extraordinary costs, e.g., living expenses, commuting, childcare, housing. All approved

training must be located within the contiguous United States, and if not in Virginia, providers must be listed on that state's eligible training provider list.

- C. In no case will WIOA funds be used to pay for any training courses that were started prior to the date of a duly-authorized and signed ITA. Staff should maintain documentation in case files showing the training program had an approved status on the date of enrollment. (In the event the program is subsequently removed for the ETPL).
- D. Only those costs directly related to and required for the approved training programs will be covered as follows:
1. Tuition, enrollment fees, and other fees such as lab and testing required for coursework outlined in the required course of study;
 2. Required textbooks as listed on course syllabi;
 3. Required supplies and training materials as listed on course syllabi or supply lists; and required tools as listed on course tool lists.

Additional items may be considered on a case by case basis and must be pre-approved by ~~the trainee's Career Coach and/or staff with authority others assigned~~ to approve ITA's and associated support services.

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- E. Participants are required to make satisfactory progress in training to access continued support of the training costs supported by their scholarship. Satisfactory progress is defined as follows:
1. The participant's grade point average does not fall below 2.0 for more than one consecutive ~~quarter or semester training period~~ if applicable;
 2. The participant maintains a grade point average sufficient to ~~graduate from, or receive certification in, complete~~ their approved area of study if applicable; and
 3. The participant is completing sufficient credit hours or equivalent to finish their approved course of study within the time frame established under their approved training plan. In the case of self-paced or non-graded learning programs, satisfactory progress means participating in classes and passing certification examinations within the time frame established under their approved training plan.

Contact with the ~~Case Manager/Career Coach staff~~ and documentation of satisfactory progress in training must occur, at a minimum monthly and at the end of each training period during the lifetime of the training plan to ensure the individual is making satisfactory progress in training.

Generally grade/competency reports or other appropriate information will be submitted by the student. If the student does not submit the required documentation, within the time frame established by ~~the employment counselor, staff~~ the customer may be declined future ITA funds until the information is received.

- F. ITA Vouchers will be issued in increments appropriate to the training program (such as by quarters, semesters, 3 or 4 quarter school years, or other training program durations) or appropriate to individual training provider's usual billing cycles. Continued issuance is contingent on satisfactory progress in training as defined above, as well as the availability of funding. The contracted service provider must make these factors known on the ITA form that is signed by the customer and training provider.

The customer and the training provider will be notified in writing regarding the discontinuation of funds due to factors outlined in Sections E. and/or F. above.

- G. Modification to Service Plan:

An individual may only modify their service plan with prior approval from the WIB's contracted service provider or designated Resource Staff. In this case, justification which supports that further training is needed in order for this individual to obtain employment is required.

V. Training Investment Guidelines

The Capital Region Workforce Development Board takes seriously its role to be sound stewards of public funds and as such, has identified a tiered set of targeted industries in which to invest its training resources. The use of ~~targeted industries tiers~~ ensures that training funded by the Board will better prepare an individual for jobs that are prevalent in the local economy. As such, maximum training allowances are structured in a way that reserves the highest amounts for those programs that will yield the best return on investment to the Board and most benefit the customer in their employment and earning success. Allowances apply to the individual for the life of their active enrollment. The amounts do not count against other services such as work experience, supportive services or OJT wages. Under special circumstances and with proper justification, a request can be made to the Board Director for a customer to exceed the ITA funding limit.

Category	Maximum Allowance
Tier I <u>Targets: Administrative, Construction/Trades, Educational Services; Finance, Healthcare; Manufacturing; Professional, Scientific and Technical Services and Transportation and Warehousing (logistics)</u>	\$10,000
Tier II <u>Targets: Administrative and Support; Construction; Finance; Hospitality and Retail and those jobs for which there is projected at least 1% annual occupational growth. This must be validated by third-party data sources such as Virginia Department of Workforce Development and Advancement Economic Information Analysis, US Department of Labor Bureau of Labor Statistics or WDB-secured labor intelligence services. (A letter from an employer guaranteeing to hire a participant upon successful completion of training may also suffice for this category).</u>	\$86,000
Occupations for which the Virginia Employment Commission projects at least 1% annual growth; or those supported by a recent economic development announcement	\$6,000
Occupations supported by a written letter from an employer committing to hire	\$5,000

VI. EXCEPTIONS TO THE USE OF ITAS FOR THE FUNDING OF TRAINING

- A. When the training services provided are for on-the-job training, incumbent worker training, ~~contract~~ or customized training.
- B. When the Workforce Board determines there is an insufficient number of training providers in the region to meet ITA objectives.
- C. When the Workforce Board determines there are training service programs of demonstrated effectiveness offered in the area by community-based organizations (CBO) or other private organizations to serve individuals with barriers to employment.
- D. When the Workforce Board determines that it would be most appropriate to award a contract to an institution of higher education or other eligible provider of training services in order to facilitate the

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training of multiple individuals in in-demand industry sectors or occupations **AND** such contract does not limit customer choice **AND** the contract is based on pay-for-performance.

| The Capital Region Workforce Development Board through its Director reserves the right to make exceptions to this policy, on a case by case basis, should individual circumstances warrant exception.

**Capital Region Workforce Partnership (CRWP)
Workforce Development Board (WDB)
Workforce Innovation and Opportunity Act (WIOA) Service Policy #SP110**

Self Sufficiency

References:

WIOA sec. 3(36)20 CFR 680.600, Training and Employment Guidance Letter (TEGL) 3-15, WIOA sec. 3(24), 20 CFR 680.640. TEGL 10-09, WIOA sec. 134(c)(3)(A), 20 CFR 680.780 and TEGL 22-04

Effective Date: Revision #1, March 12, 2026; Original December 15, 2017

Replaces: ~~Resource Management Policy #2~~

Purpose:

The purpose of this policy is to provide guidance to Board-contracted service providers with respect to determining eligibility for training services under the Workforce Innovation and Opportunity Act (WIOA).

This policy applies only to Adults and Dislocated Workers who were employed on the date of participation under the WIOA program. It does not apply to individuals who are not employed on the date of participation. **The policy does not govern enrollment into WIOA as far as eligibility.**

Background:

In addition to providing career and training services to individuals who are unemployed, there remains a significant population of job seekers who are underemployed. Individuals who are underemployed may include:

- Individuals employed less than full-time who are seeking full-time employment;
- Individuals who are employed in a position that is inadequate with respect to their skills and training;
- Individuals who are employed who meet the definition of a low-income individual; and
- Individuals who are employed, but whose current job's earnings are not sufficient compared to their previous job's earnings from their previous employment **or at the region's living wage as defined by the WDB.** ~~per State and/or local policy~~

In recognition of the above, WIOA regulations allow for training services to be made available to employed and unemployed adults and dislocated workers who, among other criteria, are:

- Unlikely or unable to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services, **and**
- Are in need of training services to obtain or retain employment leading to economic self-sufficiency or wages comparable to or higher than wages from previous employment.

The WIOA allows ~~enrollment~~ **training services for** employed adults and dislocated workers who are not earning a self-sufficient wage. WIOA requires that local workforce boards set the criteria for determining whether an employed applicant needs WIOA Title 1 funded adult or dislocated worker **training services if there wages are not at self-sufficient levels.** ~~to obtain or retain employment leading to self-sufficiency.~~

The regulation provides maximum flexibility, requiring only that self-sufficiency mean employment that pays at least the Lower Living Standard Income Level. The regulation allows self-sufficiency for a dislocated worker to be defined in relation to a percentage of the lay-off wage.

Policy

Adults

For adults, self-sufficiency is to be calculated using the Massachusetts Institute's Living Wage Calculator, which may be accessed at: <http://livingwage.mit.edu/>. This site provides a living wage calculation for each jurisdiction in the state, by family size, and should be accessed by staff at the date of determination to document if the participant's current income is providing a living wage.

Many self-sufficiency models are based on poverty levels, but those models do not account for living costs beyond a very basic food budget. The federal poverty measure does not take into consideration costs like childcare and health care that not only draw from one's income, but also are determining factors in one's ability to work and to endure the potential hardships associated with balancing employment and other aspects of everyday life. Further, poverty thresholds do not account for geographic variation in the cost of essential household expenses.

The living wage model is an alternative measure of basic needs. It is a market-based approach that draws upon geographically specific expenditure data related to a family's likely minimum food, childcare, health insurance, housing, transportation, and other basic necessities (e.g. clothing, personal care items, etc.) costs. The living wage draws on these cost elements and the rough effects of income and payroll taxes to determine the minimum employment earnings necessary to meet a family's basic needs while also maintaining self-sufficiency.

~~Limitation: In a program year (July 1 through June 30), only up to 49% of the total number of adults enrolled may be enrolled using the self-sufficiency criteria, 49% of enrolled adults may be above the region's low-income levels for enrollment in accordance alignment with the Board's Priority of Service policy.~~

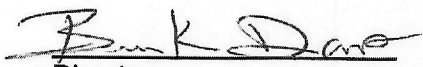
Dislocated Workers

For Employed Dislocated Workers self-sufficiency shall be defined as employment which provides the worker a wage that is equal to or greater than 85% of his or her wage at the time of dislocation.

For calculation purposes, the word "wage" and "income" are interchangeable for this policy. Therefore, the wage/income to meet the 85% criteria may be calculated by either:

- Comparing the hourly wage at time of dislocation to the current hourly wage.
- Comparing the monthly income (total earnings for the month) to the current monthly earnings.

Signed By:


Director

Capital Region Workforce Partnership (CRWP)
Workforce Development Board (WDB)
Workforce Innovation and Opportunity Act (WIOA) Service Policy #SP115
Business Services Tiers

References: Workforce Innovation Opportunity Act (WIOA); Secs. 106; 107(d)(4); 133 (c) and (d)

Virginia Board for Workforce Development Policy 403-01

Revision Date: March 24, 2022, Original Date September 13, 2018

Background and Purpose:

Virginia's strategic vision for its workforce development system is "every business has access to a qualified, job-ready workforce and every Virginian has the skills needed to connect with meaningful employment and advance in a career." The Capital Region Workforce Development Board envisions a "coordinated system where business, education, workforce, and government work seamlessly to meet the skill needs of employers and to provide workers with opportunities to earn a living wage and improve their quality of life".

The purpose of this policy is to set a business services framework for Title I staff that maintains quality, demand-driven services that are responsive to business needs, while also ensuring that investment of public dollars places a priority on employment opportunities that lead to or maintains self-sufficiency and economic independence for job seekers and workers. **The Massachusetts Institute of Technology (MIT) Living Wage calculator shall be used for certain determinations referenced herein and calculated by staff at time of application or request for service.**

Policy:

- A. The following business services shall be available to all businesses. These are "Bronze-level" services:
 1. Labor Market Information
 2. Outplacement assistance
 3. Consultation services and information
 4. **Title I staff entry of job openings in online platforms to include but not limited to the Virginia Workforce Connection, posting services (Virginia Workforce Connection)**
 5. Work Experience placements
 6. **Job Fairs and hiring events either on site in centers or offsite.**

- B. The following business services will only be available if the average hourly wage of all positions related to the services are at 75 – 99% of the "living wage" for the Capital Region as calculated by the Massachusetts Institute of Technology Living Wage Calculator. These are "Silver-level" services:
 1. All "Bronze" level services
 2. Staff assistance in screening of job applicants for business interviewing purposes
 3. Use of workforce center space for interviews
 4. ~~Job posting services in Network2Work~~
 5. ~~Job fairs and hiring events~~
 6. **5. On-the-job training contracts with a \$5,000 cap**
 7. **6. Incumbent worker training up to \$5,000 per project**

C. The following business services will only be available if the average hourly wage of all positions related to the services are at or above the "living wage" as calculated for the Capital Region by the Massachusetts Institute of Technology Living Wage Calculator. These are "Gold-level" services:

1. All "bronze and silver" services
2. On-the-job training contracts with a \$10,000 cap
3. Incumbent Worker Training with a \$10,000 cap per project.
4. Customized Training Contracts

Signed By:



Director

Agenda Item VI.

Capital Region Workforce Development Board Executive Committee

Agenda Item Summary – Procurement of Adult and Dislocated Worker Career Services Provider

What is it?

The federal Workforce Innovation and Opportunity Act (WIOA) requires that certain services such as career services for adults and dislocated workers be competitively procured through the awarding of contracts. (Unless an exception is granted by the Governor). In law, the awarding of such contracts is a sole responsibility of the Workforce Development Board, though the local Board – Chief Local Elected Official (CLEO) agreement assigns shared responsibility with the CLEO. Procurement matters for the Capital Region are managed by Henrico County as the grant recipient and fiscal agent for the federal WIOA funds.

What do Committee Members Need to Know?

The current provider of adult and dislocated worker services was awarded a contract in 2020, and grant four subsequent annual renewals were awarded. Henrico County Purchasing Policy requires that after four renewals, the contract must be put back out for competitive procurement.

A Request for Proposals was posted on December 15, 2025, with proposals due by January 26, 2026. In order to blend federal and local WIOA requirements with Henrico County procedures, a review committee made up of two local board members and one representative from the CLEO was formed to review and score proposals, interview top candidates and determine the awardee, which is then to be affirmed by the Board and CLEO prior to a new contract date of July 1, 2026.

Written proposals were scored against the following categories:

- Organizational background, qualifications and performance history (Weight – 25)
- Plan of Service (Weight – 30)
- Staffing Plan and Organizational Chart (Weight – 10)
- Partnerships and Coordination (Weight – 10)
- Budget and Financial Management (Weight – 20)
- Quality of proposal/oral presentation (Weight – 5)

After consensus scoring of written proposals, oral presentations by the top scorers were held on March 23, 2026. Bidders were then asked to provide written responses to follow up questions, followed by submission of their “Best and Final Offers” (BAFOs), which were due April 8, 2026. The committee then did a round 2 scoring factoring the original proposals, presentations, follow-up and BAFOs.

What do Committee Members Need to Do?

As of this writing, the Notice of Intent to Award has not been posted. Once posted, there is a 10-day window where written protests may be submitted. Since the Notice of Intent to Award is public information, if it has been posted prior to April 28th when the committee meets, the decision will be shared and concurrence sought. .