



**Meeting Agenda**  
**Thursday, June 23rd, 2022, at 8:00 AM**

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- I. **Call to Order** .....Kim Wimer, Vice-Chairwoman
- II. **Public Comment**
- III. **Action Item**  
Approve the Nominating Committee’s Recommended Slate of Officers for PY22 [Attachment A](#)
  - The Executive Committee voted at the June 8, 2022, meeting to recommend approval of the Slate of Officers presented by the Nominating Committee
    - o The Slate as recommended includes:
      - a. Kimberly Wimer, Chair
      - b. Dr. Carlotta Roman, Vice-Chair
    - An opportunity is available for other Board Members to be nominated from the floor for consideration
- IV. **Chairwoman’s Report**.....Kim Wimer
- V. **Consent Agenda**  
**Approve:**
  - May 2022 Board Meeting Minutes [Attachment B](#)
  - Board Service Policy 5: Individual Training Account Modifications [Attachment C](#)
  - As recommended but the Executive Committee, approve the Lake County Workforce Development Board Services Policy modifications for Policy 15: Supportive Services and Policy 18: Needs-Related Payment. [Attachment D](#)
  - Lake County Workforce Development Board WIOA Local Plan Required Modifications (2020-2024) [Attachment E](#)**Review:**
  - [The Lake County Workforce Brief](#)
- VI. **New Business**
  - 1. **Action Item**  
Approve the Workforce Innovation & Opportunity Act PY’22 Budget and Grant Plan: Workforce Innovation & Opportunity Act PY22 Allocations in the amount of \$4,743,950. [Attachment F](#)
  - 2. **Action Item**  
Accept the following components of the Lake County WIOA Youth Action Plan. [Attachment G](#)

**VII. Partner Update: Lake County Partners**

Presenter: Kevin Considine, President and CEO, Lake County Partners

- **Action Item:**

Approve endorsing the

[Lake County Partner's 2022 Comprehensive Economic Development Strategy](#) (CEDs).

[Attachments H](#)

**VIII. Updated and Information**

1. DCEO Program and Fiscal Joint Monitoring
2. Board Membership Appointments and Reappointments - September 2022
3. Lake County Workforce Development Board Equity Task Force
4. Illinois Workforce Innovation Board (IWIB)
5. National Association of Workforce Boards (NAWB)

**IX. Upcoming Board Meeting**

1. Workforce Development Board Meeting – September 22, 2022, at 8:00 AM

**X. Adjournment**



June 23, 2022

**Action:**

Approve the Nomination Committee's Recommended Slate of Officers for PY22

**Slate:**

The Slate as recommended by the Nomination Committee includes:

- Kimberly Wimer, Chair
- Dr. Carlotta Roman, Vice-Chair

An opportunity is available for other Board Members to be nominated from the floor for consideration.

The term of office begins July 1, 2022.



**Meeting Minutes**  
**Thursday, May 26, 2022**  
**8:00 AM - 9:15 AM**

*Present: Karen Stoneman, Andrew Warrington, Carla Schroeder, Carlotta Roman, Christine Hammerlund, Darryl Rader, Dennis Kessler, Arlene Santos-George, Lori Suddick, Jennifer Serino, Josh Fischer, Kathy Nellis, Michael Darling, Michael Karner, Peter Govorchin, Sandra Tran, Steven Smart, Timothy Dempsey, Kimberly Wimer*

*Absent: Anne Maine, Carrie Espinosa, Dane Morgan, Emily Garrity, Jennifer Harris, Julie Savitt, Kristi Long Kevin Considine, Laura Crivlare, Mary Ross-Cunningham, Noelle Kischer-Lepper, Patrick Statter, Pastor Eugene Roberson, Troy Mcintosh*

**I. Call to Order . . . . . Karen Stoneman, Committee Chairman**

*The meeting was called to order at 8:06 a.m.  
A quorum was verified.*

**II. Public Comment**

*No public comment.*

**III. Chairman’s Report . . . . . Karen Stoneman**

**1. Lake County Workforce Development Board Leadership**

*Chair Stoneman will be retiring from Sysmex next week. She is stepping down as the Chairwoman of the Lake County Workforce Development Board as of July 1<sup>st</sup>. We appreciate Karen’s service to LCWDB.*

*The LCWDB Chairman and Vice-Chairman roles are open. These positions will be voted on after June 1<sup>st</sup>. If you are interested in learning about these leadership roles, please contact Tim Dempsey, Nominating Committee Chairman. You may also contact Jennifer Serino or Laura Gergely for a detailed description of the roles. The LCWD Board follows Robert’s Rules of Order.*

*The Chairperson and Vice-Chairperson of the Board shall be selected from among the Board’s business representatives. Officers shall be nominated for election through an ad-hoc nominating committee appointed by the Board Chairperson. The officers of the Board shall serve for a one-year term and may be reelected for up to a third one-year term upon nomination by the ad-hoc nominating committee and subsequent election by the Board.*

#### IV. Consent Agenda

##### Approve:

- February 2022 Board Meeting Minutes Attachment A
- As recommended by the Executive Committee, approve the [Link 1/Link 2](#)  
PY2022 Job Center of Lake County Memorandum of Understanding
- As recommended by the Executive Committee, approve the Attachment B  
Memorandum of Understanding between Lake County Workforce Development Board and the One-Stop Operator Consortium (Illinois Department of Employment Security, the College of Lake County, ILDHS Division of Rehabilitation Services and the Lake County Workforce Development Department) in the amount of \$46,455.25

##### Accept:

- Accept the Workforce Innovation & Opportunity Act PY21 Attachment C  
Revised Allocation modification in the amount of \$139,211

##### Review

- Lake County Workforce Development Grant Reports Attachment D
  - Grant Expenditure Report Attachment E
  - WIOA Youth Plan Report
- The Lake County Workforce Development Success newsletter  
<https://www.lakecountyil.gov/DocumentCenter/View/45317/Success-Newsletter-Vol-22-Ed-1-PDF>
- The Lake County Workforce Brief  
<https://www.lakecountyil.gov/DocumentCenter/View/45421/Workforce-Brief-Vol-22-Ed-2>

*Action: Member Wimer motioned to approve the Consent Agenda. Member Santos-George seconded the motion.*

*All in favor.*

*Motion carried.*

#### V. Action Items

1. Approve the Workforce Innovation and Opportunity Act (WIOA) [Link](#)  
Four-Year Plan for the Northeast Economic Development Region  
(2020-2024) Modifications

*Action: Member Kessler motion to approve the Workforce Innovation and Opportunity Act (WIOA) Four-Year Plan for the Northeast Economic Development Region (2020-2024) Modifications. Member Wimer seconded the motion.*

*All in favor.*

*Motion carried.*

2. Approve the Lake County Workforce Development Board WIOA [Link](#)  
Four-Year Local Plan (2020-2024) Modifications  
Speaker: Eric Nordstrom, Career Specialist,  
Lake County Workforce Development

*Eric Nordstrom, Career Specialist at Lake County Workforce presented information on the Local Plan modifications. The Local Plan modifications are due to the COVID-19 Pandemic. Some Services were converted to virtual. This enables LCWD to reach more individuals. We have data to compare pre-pandemic versus current virtual services.*

*Action: Member Dempsey motioned to approve the Lake County Workforce Development Board WIOA Four-Year Local Plan (2020-2024) Modifications. Member Govorchin seconded the motion.*

*All in favor.*

*Motion carried.*

## **VI. Workforce Development Customer Success Spotlight – Youth**

Speaker: Jose Garza Garcia, Intern, Lake County Public Works  
Juan Cisneros, Maintenance Supervisor, Lake County Public Works

*Jose was referred to the Job Center by a family member to apply for the WIOA Grant. He chose the HVAC field as a career. He received his credentials for HVAC. Jose became a LCWD Intern at Lake County Public Works. He was hired full-time as a Utility Worker after completion of his work experience. Juan enjoys his job, and no day is the same.*

*Juan has mentored Jose and notes Jose has a good work ethic and attitude. The Partnership with LC Job Center is positive and has yielded talented individuals.*

## **VII. Workforce Development Partner Update – College of Lake County**

Speaker: Lori Suddick, Ed.D.  
President, College of Lake County

*Dr. Lori Suddick provided an overview of Student Success, Dual Credit Pathways, the Advanced Technology Center and Apprenticeship Program updates, Lakeshore Campus Revitalization and Resources for innovative education and workforce solutions. Congressman Schneider's IL-10 Federal Appropriation of \$900,000 will establish manufacturing Alliance, support students via scholarships, Apprenticeships and support program certification exams and equipment. CLC success and equity are the same as Workforce Development. Reengineer*

## **VIII. Lake County Workforce Development Board WIOA Local Plan Strategies**

1. [Lake County Youth Refresh Report](#)
2. American Rescue Plan Act (ARPA) Funding

*The Youth Refresh Report will provide the most recent data on Lake County's young adult population, collect feedback and input from diverse stakeholders. The recommendations for future systems will be led by the WDB Youth Taskforce.*

*The American Rescue Plan Act (ARPA) funding will expand programs for technical and interpersonal skills needed in the workplace. Approximately 200 individuals will be served and 150 work experiences will be funded at 80 small businesses.*

## **IX. Updates and Information**

1. LCWDB May 2022 Newsletter

*Highlights of Job Center and program updates for Revive Lake County, Summer Internship opportunities, and the Summer Youth Program. It will also highlight upcoming meetings and events. Partner Spotlight, and Job Seeker and Employer Success Stories.*

2. DCEO Program and Fiscal Joint Monitoring scheduled for May 23, 2022
3. PY 22 WIOA Annual Allocations

*The State of Illinois revised formula allocations for PY21 for the Dislocated Worker funding under Title 1 of the WIOA. Lake County is receiving a total restoration allocation in the amount of \$139,211. The Lake County WIOA allocations for PY22 were reduced by 10.53% for youth, 10.58% of adult and 1.12% for Dislocated Workers.*

**X. Upcoming Board Meeting**

1. Workforce Development Board Meeting – June 23, 2022, at 8:00 AM

**XI. Adjournment**

*Member Stoneman adjourned the meeting at 9:33 a.m.*



June 2022

## **Action**

Approve the Board Service Policy 5 Individual Training Account modifications.

## **Background**

In April 2020 the Lake County Workforce Development Board approved to add language to allow for additional participants to be served via ITAs. As recovery initiates and trainees re-evaluate their training goals, Workforce Development has seen a higher utilization of the existing policy. It is recommended to remove section: IV.5.F while allowing Workforce Development staff, to make the decision, based off the customer's Individual Employment Plans (IEP) and employment/training goals.

## **POLICY 5: Individual Training Account**

### **I. Purpose**

This policy provides guidance regarding the issuance of ITAs for training and associated eligible costs when utilizing WIOA funds.

### **II. References**

Illinois workNet ePolicy Chapter 7, Section 2: Training

Illinois workNet ePolicy Chapter 7, Section 3: Training Provider and Training Program Eligibility

DCEO WIOA Policy 15-WIOA-5.3

### **III. Terms**

An ITA is an account established on behalf of a WIOA eligible participant.

### **IV. Policy**

#### **1. Requirements**

- a. Participants must be eligible under one of the following provisions of WIOA:
  - i. 1A – Adult,
  - ii. 1D – Dislocated Worker, or
  - iii. Youth – In school and out of school
- b. Participants eligible to receive an ITA must select an approved training program that leads to a credential attainment in a career that is listed on the HPO List. Eligible and approved participants may, in consultation with the designated career planner, select an eligible program and training provider from the ETPL as documented on IWDS. The guidance and selection process will be provided in a manner that maximizes customer choice.
- c. The use of ITAs should not be used as enticement to terminate traditional academic programs. The use of ITAs will enhance, not replace, current delivery systems in accordance with local area recommendations.
- d. The WDB may develop eligibility standards for program participants beyond state policy.
- e. The WDD will use the approved HPO List for ITAs funded through WIOA.
- f. Workforce Development will be responsible for authorizing Individual Training Accounts for eligible participants enrolled in subrecipient programs.

#### **2. Funding Guidelines**

- a. The fund amount for an ITA shall not exceed \$7,000.00, except for identified healthcare training, and must be for training for careers on the HPO List. Funds may be used to pay for occupational training and related pre-requisite coursework, as identified in the participant's IEP, including tuition, required books, school



fees, supplies and equipment as outlined in the provider's course catalog and made available to the public. ITA funds may also be used for licensing and credentialing exam costs related to the training program and the industry recognized credential that is identified in the participant's IEP.

- b. In recognition of the higher cost of training for healthcare programs, eligible participants choosing to go into the healthcare field may request and receive an ITA of up to \$10,000.
  - c. Eligible clients choosing to pursue an Associate Degree program on the Workforce Board High Priority Occupation Policy #15 List and from institutions that award college credits that are transferable at degree completion are eligible for additional funding to cover the full cost of the specific program.
  - d. WIOA funds authorized from ITAs are prioritized for Lake County residents and/or eligible participants dislocated from a Lake County employer.
  - e. Participants are required to apply for other forms of federal financial aid. WIOA funds will not be withheld while the participant is awaiting determination of other financial aid eligibility. Participants who are delinquent in repaying a student loan will not be automatically disqualified from being considered for an ITA but will be counseled and advised to arrange a repayment plan with the financial institution which holds the defaulted debt.
  - f. ~~Participants utilizing a WIOA-funded ITA will be ineligible for additional WIOA-funded ITAs for a five-year period from the date of training completion. This funding restriction will not be in effect beginning March 9, 2020, through June 30, 2021.~~
  - g. If the costs of prerequisite coursework push the total costs of a participant's IEP above the appropriate funding cap, the Director of the WDD is authorized to approve an ITA for an amount higher than the funding caps on an individual basis in cases when he or she finds that:
    - i. The participant is unlikely to find employment in a high priority occupation without the training identified in the IEP; or
    - ii. The individual is basic skills deficient; or
    - iii. Based on their previous employment or academic achievements, the participant shows a high likelihood of successfully completing the training listed in their IEP and achieving training-related employment; or
    - iv. The incremental costs more than the funding cap are minimal.
  - h. In no case will the total amount of the ITA exceed 150% of the appropriate funding cap.
3. Circumstances in Which an ITA May be Denied
- a. An ITA may be denied for an otherwise eligible participant under one or more of the following circumstances:
    - i. WIOA training funds are exhausted;
    - ii. The participant has reached the maximum amount allowed;
    - iii. The individual does not meet the priority of service as defined in the WDB's Local Plan;
    - iv. The individual resides outside the geographic area of Lake County and/or was not dislocated from a company in Lake County;
    - v. The individual is not likely to succeed in training, based on an in-depth assessment;
    - vi. The training course or program is not likely to result in employment upon training completion;
    - vii. The training course or program does not lead to a career on the HPO List;
    - viii. The service provider does not accept the participant;
    - ix. The individual attempts to make changes to the ITA voucher without approval; or
    - x. The individual does not comply with reasonable program and participation requirements and conditions.



June 23, 2022

## Action Item

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As recommended by the Executive Committee, approve the Lake County Workforce Development Board Services Policy modifications for Policy 15: Supportive Services and Policy 18: Needs-Related Payment.

### Childcare Assistance Program

## Summary

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This program would target eligible individuals participating in career or training services through Workforce Development. The program reimburses eligible childcare costs using verifiable attendance records. It allows the participant to choose a licensed childcare provider for their child(ren) while focusing on their training or work experience. The financial assistance to participants will enable them to participate in training, earn a certification or credential, and find and retain employment. The pandemic brought up health and safety issues and emphasized the financial struggles of affordable childcare. In a recent national study from [move.org](https://www.move.org), 59% of parents reported that the pandemic made paying for childcare more challenging<sup>1</sup>. A recent study from the Harvard Business Review found that the loss of work hours due to lack of childcare was more significant for women of color, women without a college degree, and women living in low-income households<sup>2</sup>. The Board recognizes that many individuals in need of training services may not have the resources available to participate in the training. Childcare costs reimbursement programs can help individuals meet childcare expenses and help them complete the training successfully.

## Scope of Work

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Childcare costs are eligible for reimbursement with verifiable attendance records and other supporting documentation. Reimbursement payments are based on authorization and approval. The participant is responsible for childcare expenses not directly related to training attendance's required days/times. Verification information will be needed for the child(ren) and the childcare provider.

## Key Benefits

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- Reduce barriers to training
- Reimbursement or direct payment will offset family expenses
- A higher percentage of course/program completion
- A higher percentage of work experience completion

## Funding Amounts

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The funding cap for childcare reimbursement is \$2,000 maximum amounts per participant for the duration of the program.

## Funding Grants

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The funding will be available for individuals under Adult, Dislocated Worker, and Youth funding currently enrolled in training or a work experience.

## Projected Outcomes

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- 20 participants receive childcare assistance: A budget of \$40,000 (depending on funding)
- 80% or great of the participants complete training
- 75% or greater obtain direct employment

Additional Resources:

<sup>1</sup>[Average Cost of Child Care by State | Move.org](https://www.move.org)

<sup>2</sup>[Childcare Is a Business Issue \(hbr.org\)](https://www.hbr.org)

## POLICY 15: Support Services

### I. Purpose

This policy provides guidance regarding the use of WIOA funds for supportive services to eligible adults, dislocated workers, and youth.

### II. References

DCEO PY2005 WIA NOTICE NO. 05-NOT-04

WIOA sec. 134(C) (2) and (3) (Adults and dislocated workers) and sec. 129 (C) (2) (Youth) and defined in WIOA sec. 3(59). 20CFR 680.900-970 and 681.570.

### III. Terms

Supportive services include transportation, childcare, dependent care, assistance with educational training and testing and technology broadband internet services, payments and fees for employment and training related applications, test, and certifications, reasonable accommodations for individuals with disabilities and housing.

### IV. Policy

#### 1. Eligibility for Supportive Services

- a. Transportation costs are eligible for payment/reimbursement after verification for the days the participant has attended a scheduled training class, a scheduled work-based learning activity including an interview, a job shadow, a work-site tour, an unpaid work-experience.
- b. Transportation costs are eligible for payment/reimbursement for the first 60 days of employment.
- c. Technology costs are eligible for payment/reimbursement when remote learning is required, and a participant does not have access to a home computer. Payment/reimbursement not to exceed \$500.
- d. Broadband internet service costs are eligible for payment/reimbursement when a customer needs to create or maintain a wireless connection for distance learning, searching for jobs, and other employment and training services where such services are already allowable. Based on research payment/reimbursement should not exceed \$25.00 per month while enrolled in services.
  - i. Case managers should analyze and ensure that the broadband internet service costs are reasonable and necessary on an individual basis.
  - ii. Case managers should work with each individual customer to identify the most cost-effective method of obtaining the internet service. For example: case managers direct participants to local companies that aid with low-income residents in accessing the internet. Please see: [Your Guide to Internet Service During COVID-19 Outbreak](#).
- e. Childcare costs are eligible for reimbursement after verification for the days the participant has attended a scheduled training class or a scheduled work experience and the days the participant utilized daycare services.

#### 2. Supportive Services Eligible for Funding

- a. Transportation is an allowable supportive service to WIOA eligible adults, dislocated workers, and youth.
- b. Transportation costs are eligible for payment/reimbursement after verification for the days the participant has attended class, employment or other required program events.
- c. Childcare costs are an allowable supportive service to WIOA eligible adults, dislocated workers, and youth.

#### 3. Amount of Supportive Services Payments

- a. WIOA eligible participants are eligible for transportation payments/reimbursement not to exceed \$2,500.
- b. WIOA eligible participants who utilize public transportation will be reimbursed the actual cost of the public transportation pass or ticket, or \$10 per class day, whichever is less.
- c. WIOA eligible participants who utilize a private automobile will be reimbursed based on the following mileage as documented through Google Map at the following rates:
  - i. Participants living less than one mile (0.99) from the training provider will not be eligible for transportation reimbursements.
  - ii. Participants living between 1 mile and five (5.0) miles from the training provider will be reimbursed for \$5 per class day.

- iii. Participants living between 5.1 miles and ten (10.0) miles from their training provider will be reimbursed for \$10 per class day.
  - iv. Participants living between 10.1 and fifteen (15.0) miles from the training provider will be reimbursed for \$15 per class day.
  - v. Participants living 15.1 miles or more from the training provider will be reimbursed for \$20 per class day.
  - vi. No participants will be reimbursed for more than \$20 per class day.
- d. For Trade eligible participants, transportation reimbursement will be consistent with the Trade Act.
  - e. For participants that were enrolled and began their training before July 1, 2012, the previous reimbursement policy for WIOA customers shall apply until July 1, 2013. At that time, all clients will be subject to this policy. The previous policy allows for reimbursement for \$10 per class day for travel within Lake County, and \$20 per class day for travel outside of Lake County. Beginning July 1, 2013, all WIOA clients, no matter when they were enrolled or began training, will follow this policy.
  - f. WIOA eligible participants are eligible for childcare reimbursement not to exceed \$2,000.

#### 4. Reimbursement

- a. Reimbursement requests must be accompanied by an attendance form that verifies their attendance in class for the days for which they are seeking reimbursement. Attendance forms must be signed by instructors or other authorized staff of the training provider who can verify attendance, as well as by the participant.
- b. It is the responsibility of the participant to ensure that the reimbursement request and attendance forms reflect true and correct information. If false information is submitted as a part of a reimbursement request, including on any related paperwork, the WDD reserves the right to disqualify that participant from any future reimbursement payments.
- c. WDD staff must review and approve all reimbursement requests and associated attendance forms in advance of any payments to the participant.
- d. Reimbursement requests for childcare costs must be accompanied by an attendance form that verifies their attendance in class for the days for which they are seeking reimbursement. Attendance forms must be signed by instructors or other authorized staff of the training provider who can verify attendance and the childcare provider who verifies the days childcare was utilized, as well as by the participant. It is the responsibility of the participant to ensure that the reimbursement request and attendance forms reflect the true and correct information. If false information is submitted as a part of a reimbursement request, including on any related paperwork, the WDD reserves the right to disqualify that participant from any future reimbursement payments.

#### 5. Eligible Supportive Service for Contracted Youth Programs

- a. For contracted Youth Programs, Supportive Services can include any service allowed under WIOA, if those services are outlined in the program design, included in the program budget, and agreed to in the contract for youth services. Reimbursement for supportive services should follow the regular invoicing procedure, as outlined in the contract for youth services.



## Needs-Related Payment Program

### Overview

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This program would target eligible individuals participating in career or training services through Workforce Development. Needs-related payments provide financial assistance to participants to participate in training, earn a certification or credential, and find and retain employment. The Center for Disease Control and Prevention reported that the social determinants of health-related needs during COVID of low-income households with children were the following, concerns about financial stability (76.3%), employment (42.5%), food availability (69.4%), housing stability (31.0%), and health care access (35.9%)<sup>1</sup>. Among adults in rental housing in Illinois, 18% reported "not caught up on rent," and 26% reported "difficulty covering usual household expenses"<sup>2</sup>. The Board recognizes that many individuals in need of training services may not have the resources available to participate in the training. A needs-related payment program can help individuals meet their non-training expenses and help them to complete the training successfully.

### Scope of Work

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Needs-related payments are eligible after receiving verification documentation assessing the individual's expenses and income. The individual will need to ensure the following forms are completed before they are deemed eligible. The forms include the Financial Needs Analysis Form, Verification of Income Training Form, and Payments Analysis Form. The process will be required for each needs-related payment.

### Key Benefits

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- Reduce barriers to training
- Payments will offset family expenses
- A higher percentage of course/program completion
- A higher percentage of work experience completion

### Funding Amounts

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The amount a participant received should not exceed a total of \$2,000. First needs-related payment upon enrolling if they submit required documents and 50% of the payment is provided at this time and should not exceed \$1,000. Second needs-related payment upon the completion and verification of a Measurable Skills Gain/Credential and the remaining 50% of the payment is provided at this time and should not exceed \$1,000.

### Funding Grants

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The funding will be available under Adult and Dislocated Worker funding actively enrolled in training.

### Projected Outcomes

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- 20 clients receive needs-related payments: A budget of \$40,000 (depending on funding)
- 80% or great of the participants complete training
- 75% or greater obtain direct employment

Additional Resources:

<sup>1</sup> [Social Determinants of Health-Related Needs During COVID-19 Among Low-Income Households with Children \(cdc.gov\)](https://www.cdc.gov/health-determinants/2020/08/11/social-determinants-of-health-related-needs-during-covid-19-among-low-income-households-with-children/)

<sup>2</sup> [Unemployment Rates for States \(bls.gov\)](https://www.bls.gov/charts/unemployment-rates-by-state/)

## POLICY 18: Needs-Related Payment

### I. Purpose

This policy outlines what types of NRPs are approved by the WDB. WIOA provides program guidelines for supportive services for adults, and dislocated workers. These include services such as transportation, childcare, dependent care, housing, and needs-related payments needed to enable individuals to participate in WIOA Title I activities.

### II. References

Illinois workNet ePolicy Chapter 7, Section 4: Needs-Related Payment

WIOA Section 134(e)(3), WIOA Sections 3(59) and 134(d)(2) and (3)

### III. Terms

NRPs are granted to adult and dislocated workers who are enrolled in training when they require additional monetary assistance to complete their training plans.

### IV. Policy

#### 1. Eligibility Determination

- a. NRPs are intended to provide monetary support to eligible adults and dislocated workers when other funds are not available or have been exhausted and NRPs are necessary for the worker to participate in training. NRPs are not entitlements and must be necessary to the success of the participant's training plan. NRPs are one of the support services authorized by WIOA Section 134(e)(3) and approved by the local WDB. Due to funding constraints, the WDB does not offer NRPs.

#### 2. Adult Eligibility

- a. To be eligible for NRPs, an Adult must:
  - i. Be unemployed;
  - ii. Not qualify for UI; and
  - iii. Be enrolled in a program of training services under WIOA, section 134 (d) (4).

#### 3. Dislocated Worker Eligibility

- a. To be eligible for NRPs, a Dislocated Worker must:
  - i. Be unemployed; and
  - ii. Have ceased to qualify for UI or Trade Readjustment Allowance under the TAA or North American Free Trade Agreement—Transitional Adjustment Assistance; and
  - iii. Be enrolled in a program of training services under WIOA section 143 (d) (4) by the end of the 13<sup>th</sup> week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the 8<sup>th</sup> week after the worker is informed that a short-term layoff will exceed 6 months.

-OR-

- i. Be unemployed, and
- ii. Did not qualify for UI or Trade Readjustment Allowance under the TAA or North American Free Trade Agreement—Transitional Adjustment Assistance; and
- iii. Be enrolled in a program of training services under WIOA section 143 (d) (4) by the end of the 13<sup>th</sup> week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the 8<sup>th</sup> week after the worker is informed that a short-term layoff will exceed 6 months.

#### 4. Additional Information

- a. If these eligibility requirements are met, individuals may be awarded the initial NRP from WIOA funding at the start of training classes.
- b. Once a participant receives the initial NRPs, expenses, and income (including other sources of income, e.g., student financial aid, unemployment compensation, etc.) shall be verified by the WDD staff before the final NRP is provided. Verification will be requested from unemployment compensation, financial aid, welfare office, etc., and Page 32 of 38 Lake County Workforce Development Board Service Policies the participant. Participants that are not initially eligible for NRPs may, if their income is reduced, request a reassessment of their eligibility.

#### 5. Payment Determination

- a. Adults: The WDB has the authority to establish the payment level for eligible adults, however the payment amount of the NRP made to adults may not exceed the equivalent weekly amount of the LWIA's annual 100% LLSIL for a family of one.
- b. Dislocated Workers: The level of NRPs made to Dislocated Workers shall not exceed the greater of:
  - i. The applicable weekly level of UI compensation (for participants who were eligible for UI because of a qualifying dislocation); or
  - ii. If the worker did not qualify for UI compensation, the weekly payment amount may not exceed the poverty level of an equivalent period. The weekly payment level must be adjusted to reflect changes in total family income as determined by Local Board policies. (The poverty level for family size is established for the Adult Program and must be divided by 52 weeks to determine a weekly poverty level).
- c. Payment amounts for Adults and Dislocated Workers. The customer is screened for the initial payment of \$1,000 and is then screened again for a final payment of \$1,000. The total of the Needs Related Payment must not exceed \$2,000.
  - i. The first needs-related payment will be issued upon enrollment if they submit the required documents
    - i. 50% of the payment is issued at this time
    - ii. Should not exceed \$1,000
  - ii. The second needs-related payment will be issued upon completing and verifying a Measurable Skills Gain or Credential.
    - i. Must occur within 60-days from the start of training
    - ii. The remaining 50% of the payment is issued at this time
    - iii. Should not exceed \$1,000

## 6. Administration and Oversight

- a. Needs Analysis:
  - i. Participants requesting NRPs are required to complete a Financial Needs Analysis Form.
  - ii. Participants requesting NRPs are required to complete Commerce/NRP Form # 001 and Commerce/NRP Form # 002.
- b. Records:
  - i. The following records must be maintained for each NRP recipient:
    - ii. A copy of UI entitlement decision or confirmation of UI benefits being exhausted;
    - iii. A copy of request for training classes for each period of training (quarter, semester, block, class, etc.);
    - iv. Verification of enrollment/registration, participation, grades and completion of training classes (confirmation from Registrar's office or course instructor);
    - v. A signature by the participant attesting to his/her understanding of NRP requirements and instructions;
    - vi. Documentation of all eligibility determinations; and
    - vii. A comprehensive list of all NRPs made to the participant.

## 7. Fraud

- a. Verification in Advance of Payment: To prevent fraudulent payment activity, prior to the payment of any NRPs, WDD staff must:
  - i. Perform a cross check with UI to ensure that participants are not receiving UI, State Training Benefits, TRA, and NRPs at the same time; and
  - ii. Verify training participation.
- b. Recovery of Overpayment or Fraudulent Payment: If a review of the participant's financial records indicates that an overpayment has been made (including excess advances, if any) or that there has been any fraudulent activity, the WDD staff should immediately report the occurrence to the WDD Business Manager. Payments to the participant in question will cease immediately. The WDD will notify the participant in writing of the overpayment or fraudulent payments and will request a repayment of funds, as appropriate, within thirty days. If the amount is not repaid, the WDD Business Manager may begin debt collection procedures. All cases of fraud or suspected fraud will be forwarded to the appropriate legal authorities for prosecution per WIOA Policy Letter Number 06-PL-28.





**NEEDS-RELATED PAYMENTS FINANCIAL NEEDS ANALYSIS FORM**

**Information**

<input type="checkbox"/> First Payment	<input type="checkbox"/> Second Payment	<input type="checkbox"/> 1A	<input type="checkbox"/> 1D	<input type="checkbox"/> 1E	<input type="checkbox"/> Trade	<input type="checkbox"/> Other:
Customer Name:			Date:			
Family size:			Requested By:		Verification submitted: <input type="checkbox"/>	
<b>Monthly Family Income</b>			<b>Monthly Family Expenses</b>			
Wages/Employment/Temporary Wages			Rent/Mortgage			
UI			Gas			
Social Security			Electric			
Supplemental SI			Food			
Veterans Assistance			Public transportation			
Alimony			Car Payment			
Child Support			Gas			
Food Stamps			Car Insurance			
Other			Health Care			
			Child Care			
			Alimony/Child Support			
<b>MONTHLY INCOME</b>			\$	<b>MONTHLY EXPENSES</b>		\$
Amount of first Needs-Related Payment			\$ 1,000	Amount of second Needs-Related Payment		\$

Expenses are 75% or greater of the customer's Income

Customer meets poverty guidelines for their family size

I certify that the above information is accurate and correct to the best of my knowledge. I understand that falsifying such information may result in my dismissal from the classroom training program and possible prosecution under the law. I further certify that I will notify Lake County Workforce Development Department staff if any information changes.

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

**Interoffice Use Only**

Career Specialist Signature \_\_\_\_\_ Date: \_\_\_\_\_

Project Analyst Signature \_\_\_\_\_ Date: \_\_\_\_\_

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





June 23, 2022

**Action:**

Approve the Lake County Workforce Development Board WIOA Local Plan Required Modifications (2020-2024).

<u>Page # of Local Plan</u>	<u>Citation of Required Content</u>	<u>Required Revision</u>	<u>Modification</u>
<b>Required Revisions / Required Improvements in the Local Plan modification starting July 1, 2022:</b>			
73 – 74	<b>Chapter 5, Item D(1).</b>	<b>Required Revision:</b> The local area must describe the impact of the pandemic on the regional service strategies, including use of cooperative service delivery strategies and the connection of job seekers with employers.	<b>Modification:</b> The impact of the pandemic on regional service strategies and EDR4’s regional response and action plans is covered in detail in Chapters 1-3.
73 - 74	<b>Chapter 5, Item D(2).</b>	<b>Required Revision:</b> The local area must include steps, to the extent known, that will be taken over the next two years to adapt to the impact of the pandemic in regard to the regional service strategies, including use of cooperative service delivery strategies and the connection of job seekers with employers.	<b>Modification:</b> The impact of the pandemic on regional service strategies and EDR4’s regional response and action plans is covered in detail in Chapters 1-3.
75	<b>Chapter 6(1):</b>	<b>Required Revision:</b> The local area must provide updated information and analysis noting any significant impacts of the COVID-19 National Health Emergency.	<b>Modification:</b> The local area must provide updated information and analysis noting any significant impacts of the COVID-19 National Health Emergency. The primary impacts of the pandemic stem from the need to virtualize the delivery and structure of WIOA services and programs. As part of this mass virtualization, service accessibility has now inherently been increased to allow for 24/7 access for many core workforce services without the need to travel to a physical office location. This adoption of new technology resources has also enabled LWIA staff to continue to work effectively and efficiently in a hybrid or fully remote environment.

75	<b>Chapter 6(2)</b>	<b>Required Revision:</b> The local area must describe steps that will be taken to address the challenges and opportunities that are associated with meeting the administrative requirement of the Workforce Innovation and Opportunity Act programs.	<b>Modification:</b> The local area must describe steps that will be taken to address the challenges and opportunities that are associated with meeting the administrative requirement of the Workforce Innovation and Opportunity Act programs. In addition to the workforce equity lens described in this Local Plan, LWIA 1 will continue to monitor the lasting effects of the pandemic to maintain adaptability and flexibility with regards to the delivery of WIOA programs and services across all demographics. Examples may include the continued use or adoption of technology resources, as needed, or the continued analysis of data pertaining to customer demographics and/or characteristics.



**Lake County Workforce Development Board  
June 23, 2022**

**Action:**

Accept the Workforce Innovation & Opportunity Act PY22 Allocations in the amount of \$4,743,950.

**WIOA PY22 Title I Allocations**

The State of Illinois has issued WIOA Title I Adult, Dislocated Worker, and Youth Activities Program Allocations for Program Year 2022 (PY22) beginning July 1, 2022. Lake County is receiving a total allocation in the amount of \$4,743,950.

Funding Type	PY21 Allocation	PY22 Allocation	PY22 vs PY 21
Youth	1,687,667	1,509,995	(177,672)
Adult	1,595,452	1,426,583	(168,869)
Dislocated Worker	1,787,419	1,807,372	19,953
	<b>5,070,538</b>	<b>4,743,950</b>	<b>(326,588)</b>

Lake County Workforce Development Board  
PY'22 WIOA Grant Budget

WIOA Annual Formula Grant Allocation	5,070,538	4,743,950	326,588	
Description	PY'21 Budget	Expenditures* 5.31.22	PY'22 Budget	Budget Variance
<b>Personnel</b>				
Salaries & Fringes - Workforce Development employees	2,209,322	2,073,459	1,937,972	271,350
Indirect Cost Rate - Lake County Rate	273,868	200,479	256,416	17,452
Temporary Employment Services	37,190	211,241	6,594	30,596
Trips & Training - employees and board members	13,858	20,156	12,500	1,358
<b>Occupancy and Operational - Workforce Development and Job Center facilities</b>				
Occupancy Expense	298,717	262,705	322,844	(24,127)
Workforce Development operations	23,467	12,739	18,169	5,298
<b>Annual Contracts/Memberships/Subscriptions/Licenses - WFB, WDD, and Job Center</b>				
Salesforce Support - LCP	30,000	30,000	18,000	12,000
Metro Chicago Workforce Partners Membership	14,000	14,000	7,000	7,000
Illinois Workforce Partnership Dues	1,500	1,500	1,500	-
National Association of Workforce Boards Dues	1,700	1,700	1,800	(100)
United Way 211 Support	5,000	5,000	5,000	-
EMSI Labor Market Data	11,000	16,500	16,500	(5,500)
Publication/Subscriptions - Job Center	1,700.00	1,700.00	1,665	35
Lake County Careers Website (Virtual Information Session, Unify)	11,500.00	11,500.00	12,500	(1,000)
Reduce Recidivism Membership	150.00	250.00	250	(100)
TABE Tests - basic skills testing materials	-		5,000	(5,000)
ZOOM Licenses	750.00	750.00	894	(144)
DocuSign	10,428.00	19,520.00	19,520	(9,092)
Survey Monkey	12,000.00	12,000.00	12,000	-
LinkedIn Learning	19,560.00	19,560.00	19,560	-
Job Center Partner Referral Webpage - Unify	8,500.00	8,500.00	-	8,500
WFB - Communication & Outreach, LMI Report	40,000.00	90,000.00	80,000	(40,000)
<b>Direct Participant Services</b>				
Participant Supportive Services	15,000.00	4,772.96	122,125	(107,125)
Youth Subrecipients & MOUs	386,528.00	230,788.00	450,000	(63,472)
Youth Job Readiness/Career Awareness Software	7,500.00	18,000.00	18,000	(10,500)
Individual Training Accounts (ITAs)	1,127,300.00	1,607,009.81	1,126,822	478
Work Experience Wages	322,000.00	972,973.80	98,659	223,341
On the Job Training Wages	88,000.00	79,298.05	92,659	(4,659)
Incumbent Worker Training	100,000.00	118,200.00	80,000	20,000
Totals	<u>5,070,538.00</u>	<u>6,044,301.01</u>	<u>4,743,950.00</u>	<u>326,588</u>

\*Expenditures are based on total funds available for PY21 (7/21-6/22) - WIOA PY21 Grant \$5,070,538 + PY20 WIOA Grant Carryin \$2,089,000

**Lake County Workforce Development Board  
PY'22 WIOA Grant Budget**

Description	Budget Notes
<b>Personnel</b>	
Salaries & Fringes - Workforce Development employees	Salaries increased by 2.5% per County Board Budget Policy  Maintain 29 full-time positions and 1 part-time position on position inventory: 23.25 positions funded in this budget (2 vacant positions due to attrition and retirement plan to be filled), 1.75 positions funded through ARPA, 2 positions funded through non-formula grants, 3 vacant positions unfunded.  No change in FICA, IMRF reduced by 2.5% and no change in HLD
Indirect Rate	Lake County Government Indirect Rate 18.2% applied to salaries and wages
Temporary Employment Services	Reduced to 6,595. Contingent workers assigned to work on the PY21 Youth Plan will end assignment.
<b>Occupancy and Operational - Workforce Development and Job Center facilities</b>	
Occupancy Expense	Lease with College of Lake County. Occupancy, parking and security costs increased. Cleaning at same rate. Reduction- utilities adjustment.
Workforce Development operations	Office supplies, copier leases, records destruction, fax machines, wifi hubs
<b>Annual Contracts/Memberships/Subscriptions/Licenses - WFB, WDD, and Job Center</b>	
EMSI Labor Market Data & Job Analytics	Labor Market Data Tool - licenses shared with WDD & LCP expanded to include national data
ZOOM Licenses	Expanded to include two additional licenses
DocuSign	Expanded to include Youth Subrecipients
Pat Davis Design Group Agreement	WFB - Communication & Marketing Outreach Plan
Professional Services - Youth Refresh Report Action Plan	WFB - Procure professional services to work with Youth Task Force and Youth Action Plan
<b>Direct Participant Services</b>	
Participant Supportive Services	Increase to meet participant needs, including purchasing devices and internet services, transportation assistance and aligned with new approved policies - Needs Related Payment Policy, Child Care Reimbursement Policy. Plan to provide 60 participants with supportive services financial assistance.
Youth Contracts	Renew all youth subrecipient agreements and MOUs for 12 months.
EdgeFactor & 220 Leadership	Annual subscription fees for two new youth job readiness and career awareness online programs (replacing Bring Your 'A' Game)
Individual Training Account	Based on funding, planning to serve 225 at an average ITA of \$5,000.
Work Experience Wages/Stipends	Based on funding, planning to serve 90 at an average cost of \$10,000.



**June 23, 2022**

**Action**

Accept the following components of the Lake County WIOA Youth Action Plan.

**Note:** A report out of the final PY22 Lake County WIOA Youth Action Plan will be present at the September Board meeting with associated higher-performing KPIs.

**1. WIOA Youth Comprehensive Career Pathway Program**

The Comprehensive Career Pathway Program model is based on an integration of services delivered among and across multiple partners including the Workforce Development Department and the Job Center of Lake County. The WIOA Youth Program will serve WIOA eligible youth ages 16-24 meeting WIOA eligibility criteria for either WIOA In-School Youth or WIOA Out-of-School Youth. The LCWDB awarded agreements to the four proposals received Employee Connections, North Chicago High School (District 187), The Community Works, and First Institute Training & Management, Inc. and based on performance and available funds is recommending continuing the programs for an additional 12 months.

**Employee Connections**

July 1, 2021-May 31, 2022	Planned	Actual	Projected	Recommended Renewal
Enrollments	15	16	16	15
Budget	\$100,000	\$86,464 (4/22)	\$100,000	\$100,000

**North Chicago High School (District 187)**

July 1, 2020-May 31, 2022	Planned	Actual	Projected	Recommended Renewal
Enrollments	15	11	11	30
Budget	\$86,528	\$70,060 (5/22)	\$86,528	\$100,000

**The Community Works**

July 1, 2021-May 31, 2022	Planned	Actual	Projected	Recommended Renewal
Enrollments	15	15	15	15
Budget	\$100,000	\$93,653 (5/22)	\$100,000	\$100,000

**First Institute Training & Management, Inc.**

July 1, 2021-May 31, 2022	Planned	Actual	Projected	Recommended Renewal
Enrollments	15	10	10	15
Budget	\$100,000	\$87,330 (5/22)	\$90,000	\$100,000



## 2. Career Crossroads Program

The program will fund local high schools to deliver the Career Crossroads program to seniors with an IEP and on track to graduate and transition into employment and/or postsecondary training/education. Students will be eligible to earn stipends based on completion of workshop modules and work readiness deliverables. Plans to be negotiated with each high school based on need. The PY'21 Budget was based on each student eligible for a \$1,000 stipend and high schools eligible for a \$5,000 program cost. The PY'22 Budget is based on each student eligible for a \$900 stipend and high schools eligible for a \$4,000 program cost.

High School	Planned Enrollments	Actual Enrollments	Planned Budget	Actual Expenditure	Projected Exp	Recommended Plan	Recommended Budget
Round Lake	10	9	\$40,000	\$16,998.02 (4/22)	\$20,000	10	\$13,000
Grant	10	6	\$15,000	\$0 (4/22)	\$10,000	10	\$13,000
Grayslake North	15	9	\$36,000	\$0 (4/22)	\$20,000	10	\$13,000
Grayslake Central	10	8		\$0 (4/22)		10	\$13,000

## 3. Youth Professional Services

Procure professional services to work with the Lake County Workforce Development Board's Youth Task Force to develop a Youth Action Plan as a response to the recommendations of the Lake County Youth Refresh Report.

The budget for the Youth Professional Services \$30,000.



June 23, 2022

**ACTION:**

Approve endorsing the [Lake County Partner's 2022 Comprehensive Economic Development Strategy](#) (CEDS).

**Summary**

- Lake County Partners (LCP) is requesting the Workforce Development Board's endorsement of the CEDS.
- The CEDS is an action-oriented, five-year economic development strategy that builds upon existing efforts and offers a roadmap for building prosperity in Lake County. The CEDS was funded through an EDA technical assistance grant.
- LCP convened Lake County business, education, workforce development and civic leaders to collaboratively align economic priorities across the region and complete a new CEDS.
- The CEDS development included engagement with a variety of stakeholders through a Steering Committee, individual interviews, roundtable discussions, opportunity workshops, various community presentations, and a 30-day public comment period.
- The CEDS will be forwarded to the EDA for certification. Having a certified CEDS is required to receive federal funding for projects under the federal Economic Development Administration (EDA).
- On April 6, 2022, the Lake County Partners Board of Governors voted to accept the CEDS.
- On May 10, 2022, the Lake County Board passed a Resolution of Endorsement of the CEDS.

**RESOLUTION**

WHEREAS, Lake County Partners is a nonprofit economic development organization with the mission to maintain and improve the quality of life and economic vitality of Lake County; and,

WHEREAS, Lake County Partners received a grant from the Economic Development Administration to fund a Comprehensive Economic Development Strategy; and,

WHEREAS, Lake County Partners formed a Strategy Committee consisting of community leaders from the public and private sectors, to provide direction and input to the Comprehensive Economic Development Strategy; and,

WHEREAS, the process to create the Comprehensive Economic Development Strategy involved significant community engagement; and,

WHEREAS, the Comprehensive Economic Development Strategy includes an in-depth analysis of the County's human and economic assets; and,

WHEREAS, the Comprehensive Economic Development Strategy provides an action plan focused on Competitive Positioning, Transformational Redevelopment, and Community Engagement; and

WHEREAS, Lake County Partners will use the Comprehensive Economic Development Strategy as an economic roadmap to encourage equitable growth that ensures a vibrant and resilient economy.

NOW THEREFORE, BE IT RESOLVED, that the Lake County Partners 2022 Comprehensive Economic Development Strategy is endorsed by this Lake County Workforce Development Board; and

AND BE IT FURTHER RESOLVED that this Lake County Municipal League supports Lake County Partners in facilitating the execution of this five-year economic development strategy to build long-term prosperity for all of Lake County.

\_\_\_\_\_  
 Kimberly Wimer  
 Chair, Lake County Workforce Development Board

\_\_\_\_\_  
 Date