

# PARTNER WORK

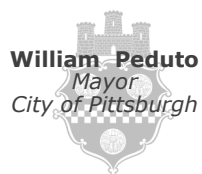
The Workforce Development Board for the Pittsburgh Area



*Building a thriving workforce for the Pittsburgh region.*

Board of Directors' Briefing Book

**D e c e m b e r 1 1 , 2 0 2 0**



David J. Malone  
Chair



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 Customer Engagements Amazon

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**Coplan, David A.**  
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**Croft, Tom**  
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 Duquesne Light (pending)

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 Jones Day

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**Harris, Carey**  
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 Allegheny/Fayette Central Labor  
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**Lane, Majestic**  
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 Mayor William Peduto  
 City of Pittsburgh

**Massaro, Steve**  
*Partner4Work Treasurer*  
 President  
 Massaro Construction Group

**McLaughlin, Caitlin**  
 Executive Vice President, Director  
 of Talent Lifecycle  
 PNC

**Melcher, Tom**  
 Business Manager  
 Pittsburgh Regional Building  
 Trades Council

**Mendoza, Brandon**  
 Executive Director  
 NAIOP Pittsburgh

**Nobers, Jeff**  
 Executive Director  
 Builders Guild of Western PA

**Pipitone, Scott**  
 President and CEO  
 Pipitone Group

**Pollard, Joshua**  
 President and CEO  
 Omicelo

**Rendulic, Mark**  
 Market President  
 Citizens Bank

**Rupert, Duke**  
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 Allegheny General Hospital

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

**Thomas, John**  
 Chief Financial Officer  
 ECHO Realty

**Topoleski, Linda**  
 Vice President, Workforce  
 Operations and Programs  
 Allegheny Conference on  
 Community Development

**Washington, Dr. Nancy**  
 Director, Allegheny Housing  
 Rehabilitation Corporation

**Williamson, Sam**  
 Chair  
 Urban Redevelopment Authority  
 Western PA Area Leader, 32BJ  
 Service Employees International  
 Union

Partner4Work Board of Directors' Meeting and  
Annual Meeting of TRWIB, Inc.

8:30-10 a.m. December 11, 2020

Via Zoom: <https://us02web.zoom.us/j/89842658851?pwd=ejJEZHlpRkFJV3JtaTRzd0Y0bG41Zz09>

1. Welcome and roll call

*David Malone, Chair*

2. General Business – Consent Agenda

- **APPROVE** Minutes from September 25, 2020, Board meeting and December 18, 2019, TRWIB, Inc., annual meeting.
- **APPROVE** Pathway Home Training Providers
  - A. Philip Randolph Institute
  - All-State Career School
  - Community Kitchen of Pittsburgh
  - New Century Careers
  - Professional Training Associates
- **ACKNOWLEDGE** The actions taken by the Executive Committee since the last Full Board meeting.
  - **Approve** Minutes from September 11, 2020
  - **Accept** \$1,050,365 in funding received since the last Full Board meeting (page )
  - **Approve** Executive Committee dates for 2021 (8:30 to 10 a.m.)
    - March 12
    - June 11
    - September 3
    - December 3
  - **Approve** Board meeting dates for 2021 (8:30 to 10 a.m.)
    - March 19
    - June 25
    - September 17
    - December 17
  - **Approve** Cohort-based Training Contracts
    - All-State Career School, \$200,000
    - Builder's Guild, \$67,000
    - NuPaths, \$70,000
    - PHASE 4, \$140,000
    - Tech Elevator, \$77,500
    - UPMC, \$235,500
  - **Approve** new or revised Financial, Personnel, and Program policies (Full policies are posted in the Board portal. A summary document follows.)
    - Cash Management
    - Financial Reporting for Government Returns
    - Pathway Home Follow-up Services
    - Pathway Home Incentives
    - Pathway Home Support Services
    - Procurement
    - Social Media and Authorized Agents
    - Subrecipient 9130 Reporting

# PARTNER WORK

The Workforce Development Board for the Pittsburgh Area

- TANF Training Voucher Policy
- Travel and Business Expenses
- WIOA Supportive Services
- **Authorize** the execution of the lease agreement for the Downtown office of PA CareerLink, Martha Graham, Massaro, broker.

### 3. Committee Reports

- **Finance and Personnel** *Steve Massaro, Treasurer*
  - Flash Report
  - APPROVE: Form 990 Submissions for TRWIB, Inc. and Regional Workforce Collaborative
- **Programs** *Susie Puskar*
- **Governance** *Debra Caplan*
- **PBEOC-P4W Task Force** *Debra Caplan and Dr. Nancy Washington*

### 4. CEO'S Report

- Ready to Work Coalition
- IBM's SkillsBuild Reignite
- Pittsburgh Area Funders Collaborative
- Advancing Pgh
- Strategic Planning

### 5. Other Business

### 6. Open Forum and Public Comment

*Speakers are limited to three (3) minutes*

### 7. Adjournment

## INTERMEDIATE STRATEGIC PLAN SCORECARD

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

#### On Target

- Industry partnerships operationalized with significant momentum in Construction, Early Childhood Education, Financial Services, Health Care, Manufacturing, Technology, and Transportation & Logistics. In the Retail and Hospitality Industry Partnership, efforts are underway in retail but hospitality is facing major challenges due to the pandemic.
- Three signature industry-led programs are operating (BankWork\$, Early Childhood Education Registered Apprenticeships, and the Introduction to the Construction Trades pre-apprenticeships).

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

#### On Target

- The Pittsburgh Area Workforce Funders Collaborative, including R.K. Mellon, Heinz Endowments, Hillman Foundation, Benedum Foundation, Buhl Foundation, and The Pittsburgh Foundation provides significant funding for work with industry partnerships, including employer engagement setting industry partnership priorities, and two industry partnership signature programs: Early Childhood Education Registered Apprenticeships and the Introduction to the Construction Trades pre-apprenticeship.
- Several financial institutions pledge support of BankWork\$.

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

#### On Target

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

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

#### Opportunity Area

- This work is in progress with dashboards/scorecards in development.
- New program management and grant management technologies being implemented for real-time information on outputs and outcomes.
- With a data and evaluation manager in place as of July, P4W intends to launch Microsoft Power BI by the end of 2020 for data visualization and key performance indicators.

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

#### On Target

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

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

#### On Target

- P4W has elevated its position on a local, state and national scale by establishing the Ready to Work Coalition, bringing IBM SkillsBuild Reignite to Pittsburgh, the first US city to launch the online learning hub, and as a key member of the Pittsburgh Regional Alliance Search Committee and Transition Committee; Allegheny Conference on Community Development Workforce Committee; Pennsylvania Workforce Development Association; National Skills Coalition, National Fund for Workforce Solutions; national Community College Working Group; Federal Communication Commission's Broadband Workgroup.

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

#### On Target

- P4W communicates and raises the visibility of its business and service delivery models and key accomplishments. Year-to-date metrics:

- Social Media growth 2020 (January 1, 2020 - December 7, 2020):
  - 685,203 total impression numbers on all channels (+58 percent)
  - 27,260 engagements (+71 percent)
  - 6,878 post clicks (+79 percent)
  - 4,739 total audience (+40 percent)
  - 1,348 total net audience growth (+56 percent)
  - (248 new Twitter followers, 299 new Facebook likes, 558 new LinkedIn followers, 373 new Instagram followers)
- PR growth 2020 (January 1, 2020 - December 8, 2020)
  - Partner4Work media mentions and placements: 30 (+22 percent)
  - Learn & Earn summer employment program mentions: 10 (+66 percent)
- Other public engagement opportunities
  - Throughout 2020, several Partner4Work staff members participated in an array of virtual speaking engagements on a local, regional and national scale. Hosts include: The City of Pittsburgh Office of the Mayor), Brookings Institution, Pittsburgh Black Elected Officials Coalition, Pittsburgh Airport Chamber of Commerce, Pittsburgh Business Times, WQED, National Association of Workforce Boards, National Fund for Workforce Solutions, Pennsylvania Workforce Development Association, Northside/Northshore Chamber of Commerce, Pennsylvania Workforce Development Association, Urban Redevelopment Authority, Lower Hill Redevelopment, etc.

#### **Areas of Opportunity for Board Engagement**

- Leadership and support needed to continue to build industry partnerships.
- Invest in additional industry-driven training with guaranteed or preferred hire links.
- Continue to leverage private funding to help providers build capacity to more effectively serve job seekers and respond to industry demands.
- Corporate Commitment for 2021 Learn & Earn program.

MEETING MATERIALS

[Program Performance](#)

Performance Indicator	Jan-Dec 2018	Jan-Dec 2019	Jan-Dec 2020
<b>PA CareerLink®</b>			
Total job seekers served (all PA CL partners and online services)	62,588	56,454	90,417
Title I Adult/Dislocated Work job seekers served	2,358	1,059	1,029
Employment placements	1,735	625	388
Employment placement rate*	96.4%	89.4%	68.1%
<b>EARN</b>			
EARN Individuals served	833	673	437
EARN placements	49.6%	36.4%	17.8%**
Work Ready individuals served	254	141	74
Work Ready positive exits	21.3%	27.7%	9.5%
<b>Re-entry Services***</b>			
Job seekers served	190	340	198
Total credentials earned	73	130	85
Employment placements	61	131	99
<b>Youth</b>			
TANF youth served	923	873	714
TANF youth placed* (employment or post-secondary education)	72.9%	69.6%	77.3%
WIOA youth served	795	703	701
WIOA youth placed* (employment or post-secondary education)	73.8%	57.9%	47.8%
<b>Learn &amp; Earn</b>			
Youth served	1,823	1,899	1,610
Number of worksites	380	330	167
Corporate youth served	32	55	51
Corporate worksites	15	22	24

\*placement rates are out of those exited

\*\*EARN placement and credential data only available through August 2020

\*\*\*Re-entry Services data available through September 2020



**Summary notes:**

- Data for 2018 and 2019 are full calendar year data, while 2020 data represent January-mid December data in most cases.
- COVID-19 and the related shutdowns depressed enrollments in nearly all programs. Placement data are also down during 2020 given the slowdowns in hiring and increased unemployment rates. Partner4Work is expanding referral networks of providers to help increase enrollments across WIOA programs.
- EARN individuals served are direct referrals from the Allegheny County Assistance Office (CAO). EARN offices do not complete outreach and recruitment. Referrals from the CAO stopped completely during the stay-at-home order and, while they have begun again, remain at very low levels.
- WIOA Youth placement data for 2020 are incomplete; second quarter after exit will finish on December 31, 2020. Providers are expected to enter data for the full second quarter by January 15, 2021.

### [WIOA Regional and Local Planning \(PY2021 - PY2024\)](#)

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

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

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

The PA Department of Labor & Industry has established a deadline of **April 2, 2021** for workforce development regions and local workforce development areas to submit WIOA regional and local plans for PY2021 - PY2024 (07/01/2021 - 06/30/2025). The Southwest Planning Region has established the following timeline for the development, submission, and approval of our regional and local plans:

#### Timeline:

- **November 5, 2020:** Initial Southwest Regional Planning Meeting
- **November 2020 - February 2021:** Review and Drafting of Regional and Local Plans
  - Scheduled Monthly Regional Planning Meetings (December and January)
- **Mid-February 2021:** Plans Posted for Public Comment
- **April 2, 2021:** Plans Submitted to PA Department of Labor & Industry
- **April 2021 - May 2021:** Address State Feedback and Finalize Plans
- **June 2021:** Final Board Approval and Chief Elected Official(s) Approval of Plans
- **July 1, 2021:** Effective Date of New Regional and Local Plans

## Summary P4W Policy Recommendations

To ensure alignment with WIOA and additional state and federal requirements, Partner4Work must develop program policies that guide how P4W-funded Adult, Dislocated Worker, and Youth services are delivered in Pittsburgh and Allegheny County. In addition, fiscal and administrative policies, as well as programmatic policies, must be voted on and approved by the Partner4Work Board of Directors prior to local implementation. Partner4Work has drafted the following for approval from the Board:

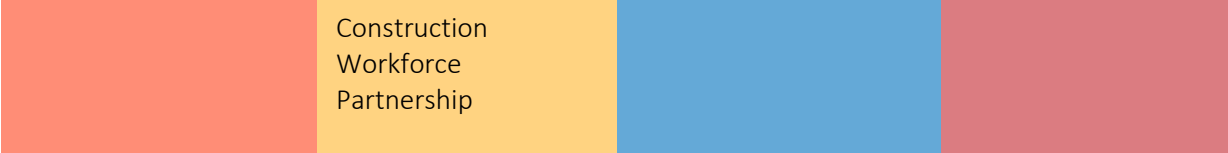
Program	Policy	Summary of Recommendations
WIOA Adult, DW, Youth	WIOA Supportive Services Policy	<p><b>Recommendation:</b> Revise current WIOA Supportive Services Policy to remove total supportive services cap of \$750.</p> <p>Limits are placed in each supportive services category to regulate spending on supportive services. Requests for exceptions to requirements in the policy may be submitted by service providers to ensure unique needs of participants continue to be met.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
USDOL Pathway Home	Follow-Up Services Policy	<p><b>Recommendation:</b> Approve a new policy that outlines how follow up services must be provided to Pathway Home program participants.</p> <p>This policy requires 12 months of follow-up services to be made available to participants following program exit. The policy also sets requirements for the frequency of follow-up service delivery, methods of delivery, and how to handle instances in which staff are unable to contact participants during the follow-up period.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Incentive Policy	<p><b>Recommendation:</b> Approve a new policy (adapted from the P4W Youth Incentive Policy) that sets requirements for how incentive payments may be provided to Pathway Home participants for achievements directly connected to program goals.</p> <p>The policy sets requirements to ensure consistency and fairness in the awarding of incentives and that proper fiscal controls are in place for the storing and issuing of gift cards as incentive payments. A cap of \$100 has been set per incentive payment.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Supportive Services Policy	<p><b>Recommendation:</b> Approve a new policy (adapted from the P4W WIOA Supportive Services Policy) that sets requirements for the types of supportive services that may be provided with Pathway Home supportive service funds.</p> <p>Limits are placed in each supportive services category (Transportation; Drug Testing; Criminal Background Checks, etc.) to regulate spending on supportive services.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
TANF EARN	TANF EARN Training Policy	<p><b>Recommendation:</b> Approve a new policy (adapted from the P4W Individual Training Account Policy) that establishes requirements for how funding for training may be provided to participants in the Allegheny County Temporary Assistance for Needy Families (TANF) Employment Advancement and Retention Network (EARN) program.</p>

		<p>The policy sets a \$5,000 cap for funding that an individual may receive to attend training. The policy also outlines eligibility requirements for participation in training, types of training programs that qualify, and other criteria that must be met prior to awarding funding (e.g. assessment/career planning).</p>
<b>Fiscal</b>	Cash Management	<p><b>Recommendation:</b> Approve updated policy to include updated account information for bank accounts.</p> <p>This policy reviews bank reconciliation process, cash flow management, line of credit drawdown and Unclaimed property.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Financial reporting & Government returns	<p><b>Recommendation:</b> Approve updated policy to reflect statements are being provided to the Finance &amp; Personnel committee, the Executive Committee, and Board.</p> <p>This policy outlines financial reports and delivery timeframes, including Board reports, Annual Audited Financials, 9130, Financial Status Reports, 990, 5500, W-2's, 1099's, BCO-10. The policy outlines public access to information on returns and details a monthly checklist of accounting activities with target dates.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Procurement Policy	<p><b>Recommendation:</b> Approve updated policy to reflect a more robust, formal procurement process following uniform guidance and other best practices.</p> <p>This policy outlines the practice of ethical, responsible and reasonable procedures regarding all matters of purchasing, agreements, contracts and other related forms of commitments. This policy follows all established government mandated regulations and standards to control all purchases of goods and services and encourage maximum level of competition and transparency. It includes definitions, procurement levels, approvals, contract requirements, and monitoring of subrecipients.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Subrecipient for 9130 reporting	<p><b>Recommendation:</b> Approve a new policy required for Partner4Work to maintain compliance federal reporting policies.</p> <p>This policy outlines requirements and time frame for reporting 9130 for subrecipients associated with Federal Grant awards.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>
	Travel & Business Expense Policy	<p><b>Recommendation:</b> Approve updated policy to refine and define travel &amp; business expense reimbursements.</p> <p>This policy defines allowable vs. unallowable travel costs, including mileage, parking, air travel, and meals. The policy gives clear examples of best practice and references uniform guidance regulations 2CFR200.405 and 2CFR200.404, expenses must be allocable, allowable, necessary and reasonable. The policy lists due dates for reimbursable charges and credit card charges.</p> <p><i>Approved by P4W Executive Committee on 11/30/2020</i></p>

Administrative	<p><b>Recommendation:</b> Approve new Social Media and Authorized Agents policy.</p> <p>This policy outlines best practices for employees to use when they communicate online for professional and personal use and to ensure transparency between Partner4Work and the public. This policy also outlines the individual(s) authorized to communicate with the public and press on behalf of P4W.</p> <p><i>Approve by P4W Executive Committee on 11/30/2020</i></p>
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**Industry Partnerships**

Industry	Transportation and Logistics (Updated, 12/20)	Construction (Updated, 12/20)	Financial Services (Updated 12/20)	Early Childhood Education (Updated 12/20)
Employers and Key Partners  *Co-conveners with P4W  <u>Business Champions</u>	Pennsylvania Motor Truck Association* <u>Beemac Trucking</u> <u>AP Logistics &amp; Trucking</u> Castle Builders Central Transport Fran B Fuhrer Wholesale Co Giant Eagle Gold Medal Environmental <u>Hunter Truck</u> Mission Logistics MPW Industrial Services <u>Pitt-Ohio Express</u> Schneider National Source One Transportation Stevens Transport Tri-State Trailer Sales Two Men and a Truck Waste Management	<u>Builders Guild of Western PA*</u> Airport Authority City of Pittsburgh Mascaro <u>Massaro Construction Group</u> Oxford Development <u>Pittsburgh Area Real Estate Development (PAR)</u> PJ Dick	PA Bankers Assn* Bank of America <u>Citizens Bank</u> Dollar Bank <u>First Commonwealth</u> First National Bank Hill District Federal Credit Union Huntington Bank JP Morgan Chase Key Bank Mars Bank <u>Northwest Bank</u> <u>PNC Financial Services</u> S&T Bank WesBanco Wood Forest	<u>Trying Together*</u> ABK Learning Center Allegheny Intermediate Unit Arsenal Family Center Brightside Academy - Squirrel Hill Carriage House Children’s Center Crafton Children’s Corner Pittsburgh Public Schools Hug Me Tight Marian Manor Child Care Riverview Children’s Center Thomas Child Care Flexible
Signature Program(s)	Career Pathways Project	Intro to the Construction Trades  First Source Hiring Agreement	BankWork\$	ECE Apprenticeships (3 levels)





## Industry Partnership-related Programs and Results

	Result	Comments
BankWork\$ (BW): Cohort 5 begins in January 2021		By hiring BW\$ grads, banks increase employee diversity and representation for neighborhoods in which branches are located
Enrolled	62	
Graduated	55	Eight individuals graduated on 12/3/2020
Placement Rate	72.7%	Does not include seven graduates from 12/3/2020 who are still interviewing. One individual from the 12/3/2020 cohort was hired by Dollar Bank.
Obtained Jobs	40	
Median Starting Wage	\$15	
Retention Rate	76.7%	
Intro to the Trades (I2TT): Cohort 1-8 (March 2019-October 9, 2020)		
Enrolled	120	
Graduated	115	
Placement rate	60%	Placement rate for all cohorts since March 2019.
Accepted into a union	52	
Employed in construction-related jobs	20	

- COVID-19 has decreased enrollments in both Intro to the Trades and BankWork\$. BankWork\$ capacity prior to March 2020 was 25 individuals per class. With requirements for social distancing, only 12 individuals can be enrolled. The two BankWork\$ cohorts (cohorts 3 and 4) started since the pandemic began averaged 10 participants. Partner banks gave assurances prior to enrolling new cohorts in 2020 that they would continue to hire. 78% of graduates from cohort 3 are employed. The majority of cohort 4 is completing second-round interviews the week of 12/7/2020.
- Intro to the Trades averaged 17 people per class prior to the pandemic and 12 people per class after the stay-at-home order began. Placement rates for Intro have been depressed since the beginning of the stay-at-home order.



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

Via ZOOM

8:30 a.m. September 25, 2020

(The full recording can be found at

<https://www.youtube.com/watch?v=kMwIG01nLQ&list=PL2d6wkiVHPChuaCNRu0QDxlqqIUNVG5TN&index=7>)

**Board Members Present**

Acklin, Kevin  
Bullock, Dr. Quinton B.  
Camino, Chris  
Caplan, Debra  
Cherna, Marc  
Cooper, Mary Frances  
Coplan, David  
Croft, Tom  
Davis, Katie  
Gittlen, Ike  
Harris, Carey  
Massaro, Steve  
McLaughlin, Caitlin  
Mendoza, Brandon  
Nobers, Jeff  
Pipitone, Scott  
Pollard, Joshua  
Staszko, Frank  
Thomas, John  
Topoleski, Linda  
Washington, Dr. Nancy  
Williamson, Sam

**Board Members Absent**

Barcaskey, Rich  
Belechak, Joe  
Casoli, Rich  
Ellsworth, Laura  
Katona, Marci  
Kelly, Darrin  
Lane, Majestic  
Malone, David  
Melcher, Tom  
Rendulic, Mark  
Rupert, Duke

**Guests Present**

Nestor, Jennifer (Labor and Industry, Oversight Services)

**Staff Present**

Buford, Earl  
Dutton, LaDonna  
Kramer, Kristin  
Mills, Jack  
Moore, Dillon  
Pajewski, Jennifer  
Puskar, Susie

## Board Meeting Minutes *(The meeting is recorded and is available at YouTube.)*

The meeting opened at 8:31 a.m. with roll. A quorum was present. Staff, board members, and guests were asked to acknowledge their participation in the chat feature.

### Announcements:

- Jasmine Herrera, former executive assistant, left P4W to become a social worker with Grant Associates; LaDonna Dutton, new executive assistant, was welcomed to the team.
- Katie Davis from Duquesne Light was welcomed to the Board. She joined Duquesne Light in the spring as the Vice President of External Affairs.

## CONSENT AGENDA

- APPROVE: Minutes from the June 26, 2020, Board of Directors meeting
- ACKNOWLEDGE: The Actions taken by the Executive Committee since the last Full Board meeting:
  - Approve Minutes from March 10, 2020
  - Approve Executive Session Minutes from May 29, 2020, and June 26, 2020.
  - Acknowledge the June 26, 2020, e-vote regarding entering an agreement with IBMReignite and approving P4W's public statement on Diversity, Equity and Inclusion
  - Approve a one-time transfer of \$100,688 from unrestricted funds to the Builder's Guild of Western PA to cover a funding shortfall for on cohort of Intro to the Construction Trades.
  - Approve Policy Exception language for internal and external audiences (attached)
  - Accept \$50,000 from IBM to support the administration of the Service Corps Reignite initiative.
  - Accept \$200,000 from the Jewish Healthcare Foundation to support and staff the Health Care Industry Partnership and understanding the employment outlook for contact tracing.
  - Accept \$2,500 from the Mansmann Foundation for Learn & Earn
  - Accept \$50,000 from Highmark for Learn & Earn
  - Accept \$25,000 from PNC for BankWork\$
  - Accept \$2,000 from the University of Pittsburgh for collaboration with the Director of Policy
  - Accept \$62,500 from the Aspen Institute for the Family Prosperity Project
  - Accept small donations received (less than \$200 total) from the United Way and Google.
- ACCEPT (see Fund Development report):
  - \$800,000 from Midwest Urban Strategies for Pathway Home

**There were no objections, abstentions, corrections, or additions to the Consent Agenda. The Consent Agenda was approved as presented.**

## FINANCE AND PERSONNEL

Treasurer Steve Massaro and CFO Kristin Kramer reviewed the flash report included in the Board Book and displayed on the screen. Highlights:

- Cash balance at the end of the fiscal year was at \$7 million, an increase of \$2.2 million from April. New funding includes Hillman, JP Morgan, and others.

## **PARTNER WORK**

- Accounts receivable include 89 percent less 30 days due. Items older than 90 days old (5 percent) are being collected.
- Liabilities include accounts payable subreipients at \$3.9 million; a PPP loan at around \$500,000 of which about \$260,000 has been spent, the remainder is a liability expected to be spent by October.
- Income and expenses totaled \$23.4 million in expenses in the last fiscal year. Management in General expenses (administrative costs) continue to remain at 7 percent.
- Federal WIOA and MUS grants increased \$3.4 million due to the National Dislocated Worker Grant and the STRIVE grant.
- Learn & Earn funds increased about \$1 million, mostly due to TANF funds during the 2019 summer; 2020 expenses will hit in the first quarter of 2020.

The Board was reminded that personnel and fiscal policies have not been updated since 2014, some immediate policy changes will be implemented immediately, such as a social media policy and the establishment of a Catastrophic Leave Bank. Dave Coplan and his class at the University of Pittsburgh will give a comprehensive review of the P4W Handbook and provide guidance and best practice recommendations.

### **GOVERNANCE**

Deb Caplan provided a short report:

- Natalie Bell left the Board and UPMC late last month, and LaTrenda Sherrill resigned from the Executive Committee about two weeks ago. LaTrenda was the member-at-large which is a required seat on the Committee.
- The Governance Committee will meet to discuss filling these seats, begin looking at term expirations and extensions, and establishing a standing committee to oversee adult programs.

### **YOUTH PROGRAMS**

- Learn & Earn 2020 concluded in early August. Every eligible applicant was offered a job, and the program served 1,600 in 2020.
- About 65 percent of the placements were virtual. Providers learned new skills in project-based learning and using Google Classroom. Youth learned entrepreneurial skills, taught digital skills to senior citizens, and completed other projects.
- The Learn & Earn Committee will procure for the next four-year cycle. An RFP will be released next month to choose new providers.
- PY19 programming finished and lessons learned from Learn & Earn will be deployed to providers while the pandemic continues. Providers rolled over a larger share of youth than normal to PY20 programming to ensure that they are supported in their workforce development during the pandemic. Providers will continue to work with youth who have not yet found employment to connect them with opportunities.
- Outcome data from the State for youth exiting the program between July 2018 and June 2019 showed P4W met performance measures for youth programs under WIOA. The US DOL has decided not to issue a waiver on performance for WIOA programs given COVID; having met the outcomes for PY19 means that if WIOA outcomes are not met this year, P4W will not face sanctions.

*ZOOM*

- In addition to this work, P4W is working with City and Pittsburgh Public Schools to create a job shadowing program for careers in the public sector for students enrolled in Career and Technical Education. Programming is set to launch in early 2021.

### **ADULT PROGRAMS**

Chief Program Officer Susie Puskar provided a report on adult programs.

- WIOA Adult and Dislocated Worker outcome measures also were met for PY19.
- WIOA registration and service delivery continue virtually since the March 16, 2020 shut down; however local CareerLink offices opened to appointment-only, in-person services on Sept. 21, 2020. Each office sees about 15 people per location per day.
- Open RFP seeks cohort training options with clear employer buy-in.
- Programs like Bankwork\$ and Intro to the Trades have proven to be successful models for training and employment, even during the pandemic. New partners are being sought to amplify CareerLink services.
- The online re-employment services continue through the online hub; users are encourage to use virtual services.
- Numbers of job seekers accessing services at CareerLink were reviewed and placements in July and August increased, indicating that the job market is starting to recover and Grant and Dynamic are gaining steam with employers and better understanding the local landscape with a full program year as the Title I providers. Starting wages for adults were slightly lower than last year but overall starting wages have increased. There has been an increase in the number of job seekers receiving industry-recognized credentials.
- Better connecting job seekers and employment opportunities entered into the system of record is on a clearer path to success with the development of more robust pipeline team strategy.
- Several career fairs with Amazon, Allegheny Health, Dollar Bank with a defined strategy for matching and placement has been deployed.
- A strategy for deploying OJT (on-the-job training dollars) shows early success and P4W is on track for exceeding the number of OJT spent this year.

Subsequent discussion focused on diversity-focused career fairs and whether P4W can assist in helping individuals overcome the lag and barriers in receiving Unemployment Compensation benefits. P4W through the PA Workforce Development Association has advocated for workforce boards to play a larger role in Unemployment Compensation. The Board discussed opportunities to advocate for a system rebuild. Frank Staszko discussed the limited roles PA workforce professionals have been able to take to help UC claimants. While the one-to-one interaction is helpful in tackling small issues, such as password resets and other administrative obstacles, UC determination and adjudication remains a sole UC function.

### **CEO'S REPORT**

CEO Earl Buford provided the following highlights:

- The PBEOC-P4W Task Force focuses on childcare, transportation, and the advancement/acceleration strategy of Black-owned businesses.
- An internal Affinity Group has been established at P4W, with Markese Long as the director of outreach and inclusion, leading the efforts.
- IBM SkillsBuild Reignite continues to make progress, with substantial effort to launch the Pittsburgh hub and to convene partners to elevate efforts with job seekers, non-profits, and small businesses. Businesses engaged to date include ANSYS, Duquesne Light, PNC, and UPMC.

## **PARTNER WORK**

- Ready to Work Coalition has advanced to the intermediate phase, providing resources and strategy to implement a public sector strategy, using the police ambassador transitional jobs model, as a component of the strategy.
- An economic subgroup, under the auspices of Ready to Work, composed the URA, the city, county, Bridgeway Capital and others, are developing a workforce strategy as funding opportunities are deployed.
- Strategic planning process is expected to begin before the end of the year, with the expectation that it will be completed in 2021.

### **OTHER BOARD BUSINESS**

Tom Croft discussed Steel Valley Authority's SEWN (Strategic Early Warning Network) focus on the worker safety box, based on a survey in June, a drive to provide PPE to small manufacturers.

### **PUBLIC COMMENT**

There was no public comment.

**On a motion by Dave Coplan, seconded by Scott Pipitone, the meeting adjourned at 9:36 a.m.**

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

The Rivers Club, 301 Grant Street, Suite 411, Pittsburgh PA 15219

3 p.m. December 18, 2019

**Board Members Present**

Barcaskey, Rich  
Belechak, Joe  
Bullock, Dr. Quintin  
Camino, Chris  
Caplan, Debra  
Cherna, Marc  
Cooper, Mary Frances  
Coplan, Dave  
Ellsworth, Laura  
Harris, Carey  
Lane, Majestic  
Malone, Dave  
Massaro, Steve  
McLaughlin, Cat  
Melcher, Tom  
Mendoza, Brandon  
Pollard, Josh  
Rendulic, Mark  
Staszko, Frank  
Thomas, John  
Washington, Dr. Nancy  
Williamson, Sam

**Board Members Absent**

Allen, Will  
Bell, Natalie  
Dugan, Ann  
Ferraro, Melissa  
Gittlen, Ike  
Katona, Marci  
Kelly, Darrin  
Nobers, Jeff  
Pipitone, Scott  
Powers, Beth

**Guests Present**

Acklin, Kevin (Pittsburgh Penguins)  
Carter-Frye, Melody (Carlow University)  
Cotter, Doug (Grant Associates)  
Figlar, Michelle (Heinz Endowments)  
Gbee, Phillip (Grant Associates)  
Harvey, Peter (Allegheny County DHS)  
Higgins, Kiara (Dynamic Workforce Solutions)  
Holderman, Shari (Pipitone Group)  
Morrow, Delvina (Pittsburgh Penguins)  
Nestor, Jennifer (Labor and Industry, Oversight Services)  
Stanboro, Sean (PA CareerLink/ResCare)

**Staff Present**

Buford, Earl  
Herrera, Jasmine  
Herron, Ray  
McGuire, Kelly  
Mills, Jack  
Mosley, Franklin  
Pajewski, Jennifer  
Puskar, Susie

## Board Meeting Minutes (continued)

Governance Chair Debra Caplan called the meeting to order at 3:02 p.m. and announced that the meeting would serve as the quarterly meeting of Partner4Work and the annual meeting of TRWIB, Inc.

Ms. Caplan offered a few announcements and acknowledgments:

- Condolences to Scott Pipitone on the passing of his mother, Joanne
- Welcome to Board nominees:
  - Kevin Acklin, Pittsburgh Penguins
  - Rich Casoli, Beemac Trucking
  - Tom Croft, Steel Valley Authority
  - Duke Rupert, Allegheny General Hospital
  - Linda Topoleski, Allegheny Conference on Community Development
- Thanks to outgoing Board members:
  - Melissa Ferraro, Allegheny Health Network
  - Longtime member and former Service Delivery Chair Ann Dugan, Family Office Exchange

Ms. Caplan concluded announcements with recognition and appreciation of departing P4W staff McCrae Martino and Ray Herron, chief program officer and chief operating officer. Years of service by Ms. Martino and Mr. Herron were recognized with a token gift; a reception was held following the Board meeting.

## Year-round programming and Learn & Earn

Ms. Caplan provided two updates related to year-round youth programming: announcing the development and distribution of an RFP to support businesses in creating a young adult pipeline and supporting youth in their career development, and planning with Allegheny County DHS, KidsVoice, Auberle and the Jail Collaborative to recruit and support youth involved with the foster care system.

In an update about Learn & Earn, Ms. Caplan provided insights about participants' activity post-program. These activities include:

- 20 percent of year-round students participated in Learn & Earn 2019
- 20 percent of L&E students are working and not attending school; 8 percent were in college or trade school.
- 95 percent of young people who participated in a survey reported attending school or working.
- 80 percent of respondents felt that L&E better prepared them for the next steps in their education or career.

## Audit/Finance

Ray Herron provided an overview of financial statements included in the Briefing Book. Key points included:

- The cash balance of approximately \$4 million is consistent from year to year.
- Accounts receivable increased by \$1.4 million due to the receipt of Federal Dislocated Worker funding
- PAsmart grant awards, and the timing of Learn & Earn payments
- Net asset roll-forward includes \$130,000 raised from banks to support BankWork\$ and \$175,000 received from Heinz Endowments to support Early Childhood Education work
- Statement of activities showed typical activity for the first quarter of 2020 with no change in unrestricted assets

- Overall expenses decreased by \$70,000 due to the approval of the Indirect Cost Rate with the Department of Labor. Management and General expenses for the previous year were adjusted in the fourth quarter with direct allocation. The overhead cost rate was 7.3 percent as of September 30.
- Direct program costs decreased \$790,000 due to the timing of invoices
- Salary, wages, and benefits increased \$400,000 due to right-size hiring.
- Contracted services (consulting services) increased by \$100,000.

### Governance

Ms. Caplan continued with a short report on Governance.

With the retirement of former Treasurer Lisa Kuzma, Ms. Caplan reported the Committee's efforts to identify a long-term replacement for treasurer. In the meantime, Board member Steve Massaro has been nominated and has agreed to serve a two-year term in office.

**On a motion by Carey Harris, seconded by Sam Williamson, Steve Massaro was elected to a two-year term as Treasurer by unanimous vote. There were no abstentions.**

Ms. Caplan continued with proposed meeting dates for 2020 as is required in the Bylaws. Dates proposed were March 27, June 26, September 25, and December 11. Meetings would continue to be held from 8:30 to 10 a.m. at P4W offices.

**On a motion by Majestic Lane, seconded by Dave Coplan, 2020 meeting dates were approved by unanimous vote. There were no abstentions.**

### Consent agenda and CEO's report

Ms. Caplan took roll and announced a quorum present.

Matters on the consent agenda were listed in the Briefing book and included the approval of minutes, minor revisions of the local and regional workforce plans, P4W policies, and accepting of grant awards including a \$12,000 grant from U.S. Steel to support the Manufacturing Industry Partnership.

**With no questions, comments, additions, corrections or discussion, the consent agenda passed as presented.**

CEO Earl Buford provided a short update including:

- A proposal to enter into a \$40,000 contract with Robert Half to conduct an Executive Search for a new COO.
- Awarding a \$23,500 contract to Pipitone Group for creative services to support Industry Partnerships.
- Awarding a \$166,000 contract with the Builders Guild for the Intro to the Construction Trades pre-apprenticeship training program.
- Awarding a \$90,000 contract with Jewish Family and Community Services for dislocated worker services.



The Board discussed issuing an RFP for Executive Search services and declined to put the contract decision to vote. Mr. Buford intended to notify Robert Half of the Board's decision and issue an RFP in early January and following P4W's procurement policies and procures.

P4W released an RFP in October 2019 for creative services to support Industry Partnerships. In addition to brochures and takeaways, P4W requested communications support for a tagline, social media, infographics, and other outreach materials. Five firms submitted proposals which were scored by a team of staff, Board members, and IP consultants. The three highest-scoring firms were asked to produce a mockup of a one-pager which was scored separately. Based on overall scoring, P4W recommended contracting with Pipitone Group for these services.

**On a motion by Dave Coplan, seconded by Dr. Nancy Washington, the Board approved a \$23,500 contract with Pipitone Group for creative services to support IPs. Marc Cherna abstained.**

A contract with the Builders Guild supports Intro to the Construction Trades (I2T) pre-apprenticeship training with guaranteed placement into an apprenticeship or the laborers. This signature program of the Construction Industry Partnership was discussed at length at previous P4W Board meetings.

**On a motion by Dr. Nancy Washington, seconded by Cat McLaughlin, the Board approved a \$166,000 contract to the Builders Guild to support the Intro to the Trades pre-apprenticeship training program. There were no abstentions.**

In November 2019, Partner4Work issued an RFP for National Dislocated Worker Grant (NDWG) services. The NDWG RFP was the second RFP under the program; the first RFP did not result in a contract. The goal was to identify a provider with a proven track record in serving dislocated workers not served by the PA CareerLink system. The period of performance is expected to be January 2, 2020, through September 30, 2020.

In response to the NDWG Career Services RFP, P4W received four proposals. Proposals totaled \$360,000 in requests; \$90,000 is available. Each NDWG proposal was scored by a review committee. Based on the scores of the review committee, P4W recommended awarding a \$90,000 contract to Jewish Family and Community Services.

**On a motion by Dr. Nancy Washington, seconded by Majestic Lane, the Board approved a \$90,000 contract with JFCS for dislocated worker services. There were no abstentions.**

### Overview of Signature Programs

#### **Lower Hill Redevelopment, First-Source Clearinghouse Model**

Mr. Kevin Acklin, Board nominee and Senior Vice President and Chief Counsel of the Pittsburgh Penguins, presented plans to redevelop the former site of the Civic Arena, a potential \$1 billion mixed-use redevelopment intended to revitalize the Lower Hill and the commitment of the development team and owners on the Lower Hill Redevelopment Community Collaboration and Implementation Plan (CCIP) dated September 11, 2014. Among other things, Mr. Acklin discussed the role of developers (BPG), the Trades, P4W, and other community-based agencies to provide pathways to union and non-union jobs, construction and end-use opportunities, MWBE opportunities, and others.

## **PARTNER WORK**

As a part of a first-source hiring model proposed to the Pittsburgh Pens, P4W will be the clearinghouse for individuals entering Intro to the Trades, the preferred training program pre-apprenticeship for union construction jobs on the 28 acres, end-use jobs, such as security or hospitality positions typically with the SEIU, and data collection and reporting of individuals in the system from the Hill District. A proposal outlining P4W's role as the workforce clearinghouse is with the Pens for consideration. Also, P4W, Literacy Pittsburgh, SEIU, and the Builders Guild are working on a strategy to help individuals prepare for entrance tests or for other end-use opportunities.

### **BankWork\$ and Early Childhood Education**

Partner4Work staff offered a brief update on BankWork\$, the signature training program of the Financial Services Industry Partnership.

BankWork\$, the training for entry-level positions in the banks, is conducted at the Energy Innovation Center and launched in October with 20 students in the first class, 19 of whom completed the program in November. Of them, many received several job offers with banks including PNC, First Commonwealth, Dollar Bank, and others. Additional information would be shared with the Board as final placements are confirmed or additional supports are necessary for students to be placed. The next cohort is expected to begin in late January.

Michelle Figlar of Heinz Endowments offers an overview of the Early Childhood Education (ECE) pre-apprenticeship program launch in conjunction with Trying Together, Literacy Pittsburgh, and higher education and with support from the Kellogg Foundation. The program is intended to expand access to quality child care in the community as well as build the pathway for workers to advance to in their career by potentially training to be educators.

### **Telling our story with the Pipitone Group**

With time running short, Shari Holderman, senior account supervisor with the Pipitone Group, provided a quick update on the initial work of the agency to support the Board's objectives around communicating the value of Industry Partnerships. Among other things, Ms. Holderman detailed audience, goals, literature and a concept infographic to illustrate the value proposition to businesses. The board's feedback included the need for a short, yet powerful, tagline – such as Pipitone's tagline of "*InteGREAT thinking.*" More information will be available to the Board as the work progresses.

### **Other Board discussion**

None

### **Public comment**

There was no public comment.

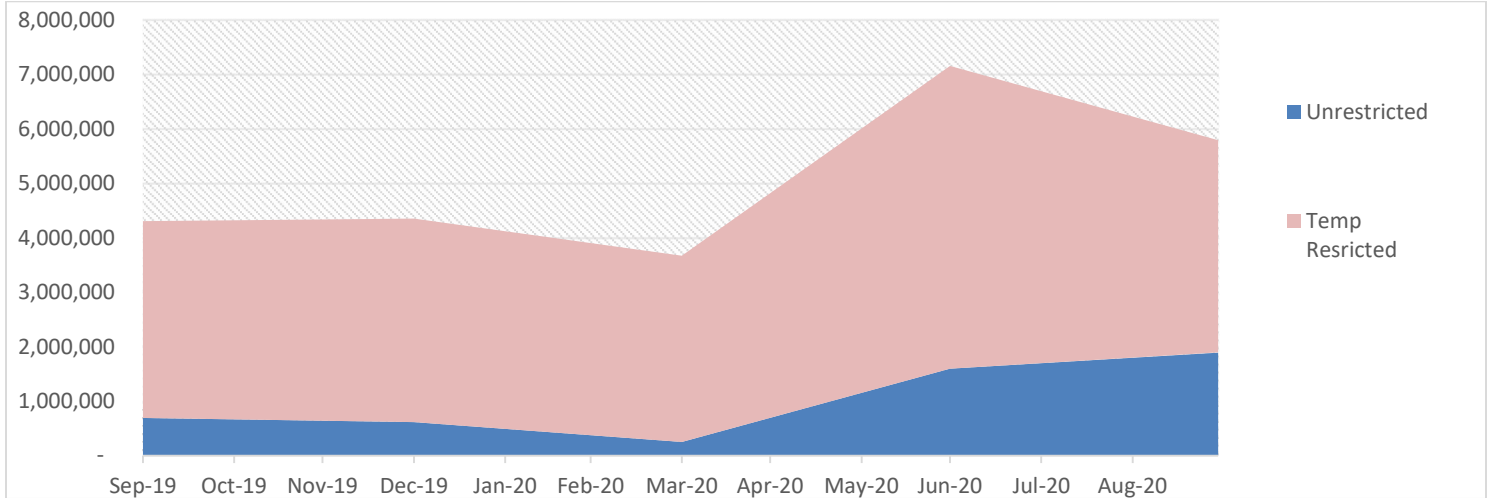
**On a motion by Dave Coplan, seconded by Joe Belechak, the meeting adjourned at 4:45 p.m.**

Partner4Work Fund Development Report							
Fiscal Year	2020-2021	Dates	09-22-2020 through 11-19-2020				
Quarter	Q 2	Staff Lead	Jack Mills, Chief Strategy Officer				
Funding Secured during FY 2020-2021			Funding to Date for P4W, FY 2020-2021	for	Funding to Date for the Greater Pittsburgh Community (FY 2020-2021)		
\$895,803			\$3,506,618		\$255,645		
Number			FY 2020-2021 Budget Implications		Future Year Implications		
Grants Awarded This Quarter	5		\$374,688		\$640,312		
New Non Grant Based Funds Awarded (Board Participation, Gifts, Corporate Sponsorships)	2		\$35,365		\$0		
Grants (Etc.) Approved Previously in Fiscal Year 2020	7		\$485,750		\$797,907		
Grants Extended	8		\$1,182,589		\$0		
Prior Year Grants With Fiscal Year 2020 Allocations	15		\$1,428,226		\$0		
Grants Pending	7		\$561,102		\$5,386,534		
Grants Declined This Quarter	1		\$130,000		\$0		
<b>Detail Q 2 2020-2021</b>							
<b>Grants Approved This Quarter</b>							
Grantor	Award	Amount to P4W	FY '20-'21 Allocation	Future Year Allocation	Partners	Comment	Months
Citizens Bank	\$45,000	\$45,000	\$45,000		FSIP and CIP partners	Funding partial Bankwork\$ and I2TT cohorts	12
Heinz Endowments	\$200,000	\$200,000	\$100,000	\$100,000	CCAC, Trying Together, Carlow University and Literacy Pittsburgh	Funding to support the ECE Apprenticeship work	12
National Fund for Workforce Solutions	\$195,000	\$195,000	\$50,000	\$145,000	APRI, Giant Eagle, Sheetz, CareerLink, Goodwill, United Way, RCI, Vibrant PGH	Redesigned Jobs, Resilient Workers - imp	30
CSBG (County)	\$575,000	\$575,000	\$179,688	\$395,312	PA CareerLink		16
<b>Note: * = amount awarded is for multiple partners</b>							
<b>NewNon Grant Based Funds Awarded (Corporate Giving, Special Initiatives and Other Fund Development Revenue)</b>							
Area	Award	Amount to P4W	FY '20-'21 Allocation	Future Year Allocation	Partners	Comment	Months
Northwest Bank	35,000	35000	35000		BW\$ Partners	For facilitation of Bankwork\$	12
Befinity Funds (Google, Inc)	365	365	365		None	For general operating	2
<b>Grants and Corporate Giving (etc.) Approved in Previous FY 2020 Quarters</b>							
Grantor	Award	Amount to P4W	FY '20-'21 Allocation	Future Year Allocation	Partners	Comment	Months
IBM Service Corps Reignite	\$50,000	\$50,000	\$50,000	\$0	Jones Day, IBM	the wake of COVID 19	12
Jewish Healthcare Foundation	\$200,000	\$200,000	\$200,000	\$0	Healthcare IP employers and partners	Support and staff the Health Care Industry Partnership and understand the employment outlook for contact tracing	12
Mansmann Foundation	\$2,500	\$2,500	\$2,500	\$0	L&E Partners	Learn & Earn 2020	4
Pathway Home - US DOL - Lead Applicant: MUS*	\$3,500,000	\$916,657	\$150,000	\$766,657	MUS in partnership with P4W & 3 other cities' workforce boards	To expand reentry job training, including reach-in, pre-release services, with funding for P4W, MUS, and workforce boards in Kansas City and Wichita.	42
Aspen Insite	\$125,000	\$62,500	\$31,250	\$31,250	Allegheny County DHS, IP partners	Building system connection between DHS programming for families and P4W's Industry Partnerships to improve employers' family-focused policies, connect family voices to employers and connect programming for families to employers and their employees.	24
Highmark Foundation	\$50,000	\$50,000	\$50,000	\$0	L&E Partners	Learn & Earn Funding	4
University of Pittsburgh	\$2,000	\$2,000	2000	\$0	U of Pitt and P4W	Collaboration with P4W's Director of Policy	12
<b>Note: * = amount awarded is for multiple partners</b>							
<b>FY 2019-2020 Funding Extended to FY 2020-2021</b>							
Grantor	Award	Amount to P4W	FY '20-'21 Allocation	Future Year Allocation	Partners	Comment	Months
PAsmart Reemployment Services: Early Childhood Education IP**	\$62,400	\$62,400	\$62,400	\$0	ECE Industry Partnership	ECE Industry Partnership activity funding	9
PAsmart Reemployment Services: Early Childhood Education RA**	\$56,267	\$56,267	\$56,267	\$0	ECE Partners (Trying Together, CCAC)	ECE apprenticeship program funding	9
PAsmart Reemployment Services: K-12 IP**	\$6,461	\$6,461	\$6,461	\$0	K-12 Industry Partnership	K-12 Industry Partnership activity funding	9
PAsmart Pre Apprenticeship***	\$34,890	\$0	\$0	\$0	AFL-CIO/KDP	Union Pre Apprenticeship with AFL-CIO	9
PAsmart Reg. Apprenticeship***	\$132,731	\$0	\$0	\$0	AFL-CIO/KDP	Union apprenticeship with AFL-CIO & I2TT	9
PAsmart Pre-Apprenticeship: Construction***	\$17,723	\$0	\$0	\$0	Builders Guild	Funding for I2TT program	9
PAsmart Pitt Consortium for Advanced Manufacturing***	\$70,301	\$0	\$0	\$0	Pitt MAC	Supporting Pitt MAC's efforts in manufacturing IP work	9
City TANF**	\$1,057,461	\$1,057,461	\$1,057,461	\$0	TBD	Allocated to a cohort training RFP	9
<b>Note: **=extension on previously received funding; ***=extension on previously received funding for which P4W is the fiscal agent</b>							

Prior Year Grants With Fiscal Year 2020 Allocations							
Grantor	Award	Amount to P4W	FY '20-'21 Allocation	Future Year Allocation	Partners	Comment	Months
PNC Charitable Trust	\$10,000	\$10,000	\$10,000	\$0	L&E Partners	Learn & Earn Funding	4
CDBG (City)	\$100,000	\$100,000	\$100,000	\$0	PACL, Neighborhood Organizations	COVID-19 Career Services Expansion: P4W, in partnership with PACL CareerLink and neighborhood organizations, will put residents to work in target neighborhoods and by hiring 2 circuit rider employment specialist and expanding our social media outreach.	11
CDBG (County)	\$450,000	\$450,000	\$225,000	\$0	L&E Partners	Learn & Earn Funding	4
Hillman Foundation	\$500,000	\$500,000	\$400,000	\$0	PGH Workforce Funders Collaborative, Mayor's Office	Funding to advance Industry Partnerships through expansion of the general IP strategy, an IT market analysis, improvement of construction industry training, and the strengthening of the IP youth pipelines. Additionally, Partner4Work is requesting funding for a strategy to increase access to quality jobs and improve job quality & equity and explore ways to strengthen local MWBEs/other businesses.	12
BEP - PA Department of Labor	\$161,958	\$161,958	\$108,512	\$0	PPS, City of Pittsburgh	Funding to develop an employment program with the City of Pittsburgh to place young adults from CTC programs in part-time employment within several departments of the City of Pittsburgh.	18
Hillman Foundation	\$100,000	\$100,000	\$50,000	\$0	L&E Partners	Learn & Earn Covid-19 Transition Funding	4
RK Mellon Foundation	\$150,000	\$150,000	\$150,000	\$0	UPMC, PACL	Funding to hire 1-2 workforce specialists to be shared between PACL and UPMC's Medicaid Plan. Will focus on providing services to UPMC members, as well as connecting public workforce system participants to jobs in UPMC network.	12
Chase Foundation	\$125,000	\$125,000	\$62,500	\$0	L&E Partners	Learn & Earn Funding	4
Pittsburgh Foundation - YSIF	\$330,000	\$330,000	\$165,000	\$0	L&E Partners	Learn & Earn funding for youth and young adults in HACP housing	4
Miller Foundation	\$10,000	\$10,000	\$5,000	\$0	L&E Partners	Learn & Earn funding	4
Pittsburgh Foundation	\$100,000	\$100,000	\$50,000	\$0	L&E Partners	Learn & Earn funding for youth and young adults in Allegheny County	4
Pittsburgh Foundation	\$75,000	\$75,000	\$60,714	\$0	CIP employers, Builders Guild	To support further development of the construction industry partnership by Partner4Work through recruitment and hiring of an industry liaison and buildout of a first-source recruitment hub for major development projects.	12
McAuley Ministries	\$50,000	\$50,000	\$25,000	\$0	L&E Partners	Learn & Earn funding	4
Grable Foundation	\$25,000	\$25,000	\$12,500	\$0	L&E Partners	Learn & Earn funding for COVID-19 transition	4
Citizens Bank Foundation	\$8,000	\$8,000	\$4,000	\$0	L&E Partners	Learn & Earn Corporate funding	4
Pending Grants							
Grantor	Request	Amount to P4W	Potential FY '20-'21 Allocation	Potential Future Allocations	Partners and Project Scope		Months
National Science Foundation	\$50,000	\$15,000	\$15,000		Funding for Achieving Equity through Partnerships and Mobility Services with University of Pittsburgh (applicant), CONNECT For service sector employers (e.g., FSIP)		4
NFSW: Activating Employers in the Service Sector	\$50,000	\$50,000	\$50,000	\$200,000			18
US DOL - One Workforce (MUS Lead Applicant)	\$10,000,000	\$1,430,000	\$178,750	\$1,251,250	Work with partners in Technology and Advanced Manufacturing to develop/expand existing training programs which create pathways to middle/high-skill careers		48
US DOL - One Workforce (AFFOA Lead Applicant)	\$8,292,725	\$2,113,818	\$264,227	\$1,849,591	Work with partners in Advanced Manufacturing as well as AFFOA, Drexel, CCAC, and ARM Institute to develop/expand existing training programs which create pathways to middle/high-skill careers. A focus will be put on developing opportunities in the Advanced Fabrics arena		48
ARC Inspire (Southwest Corner WDB Lead Applicant)	\$500,000	\$112,500	\$28,125	\$2,085,693	Work with four Workforce Boards in SW PA to develop a regional substance abuse recovery ecosystem		24
Kaufman Knowledge Challenge	\$25,000	\$25,000	\$25,000		Funding to place Hill residents, especially those who are dislocated		12
Victims of Human Trafficking (SVHT) - US DOJ	\$67,500	\$0	\$0		MUS in partnership with P4W, Employ Milwaukee, Jones Day and Fresh Start Learning applied to improve workforce development		36
Grants Declined This Quarter							
Grantor	Request			Partners			
National Fund for Workforce Solutions	\$130,000			healthcare industry			
Upcoming Identified Funding Opportunities							
Source	Grant Max		Comment				
YouthBuild	\$1,500,000		Federal grant to fund pre-apprenticeship work, work for opportunity youth aged 16-24				
RK Mellon Foundation	\$250,000		TBD but focused on strategies for economic development and workforce development				
Key Bank	\$50,000		Financial Services Industry Partnership, including BankWork\$				
First Commonwealth Bank	\$25,000		BankWork\$ Funding (\$15,000); Financial Services Industry Partnership (\$10,000)				

## Dashboard Report

### Cash Flow Unrestricted and Temp Restricted Funds



### Current Assets, Liabilities & Equity

#### Cash:

Temp Restricted – \$3,903,989  
Unrestricted - \$1,895,813

*Total Cash - \$5,799,802*

**Line of Credit** secured by Money Market  
\$0 of \$500,000

#### Other Current Assets

Prepaid Expenses - \$12,393  
Prepaid Insurance - \$12,322  
Security Deposit - \$6,067  
Other Receivables - \$0

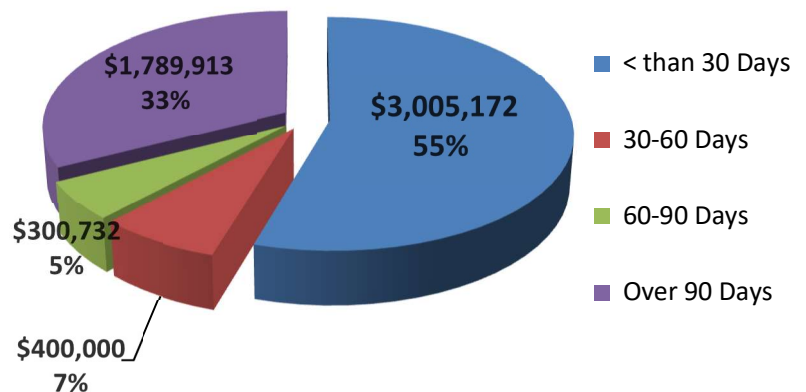
#### Liabilities

A/P- \$4,697,990 (\$4,471,174 due to subrecipients)  
PA Unclaimed Property - \$1,309  
Accrued Vacation - \$75,577  
Deferred Rent - \$4,441  
Paycheck Protection Program \$0 \*\*  
Accrued Payroll - \$ 6,825

#### Equity

Unrestricted Net Assets - \$726,259  
Temp Restricted Net Assets- \$7,745,658\*\*  
Net Income – (\$1,887,591) \*\*\*majority portion from temp restricted funds being released for Learn & Earn.

### Partner4Work Accounts Receivable - \$5,495,817

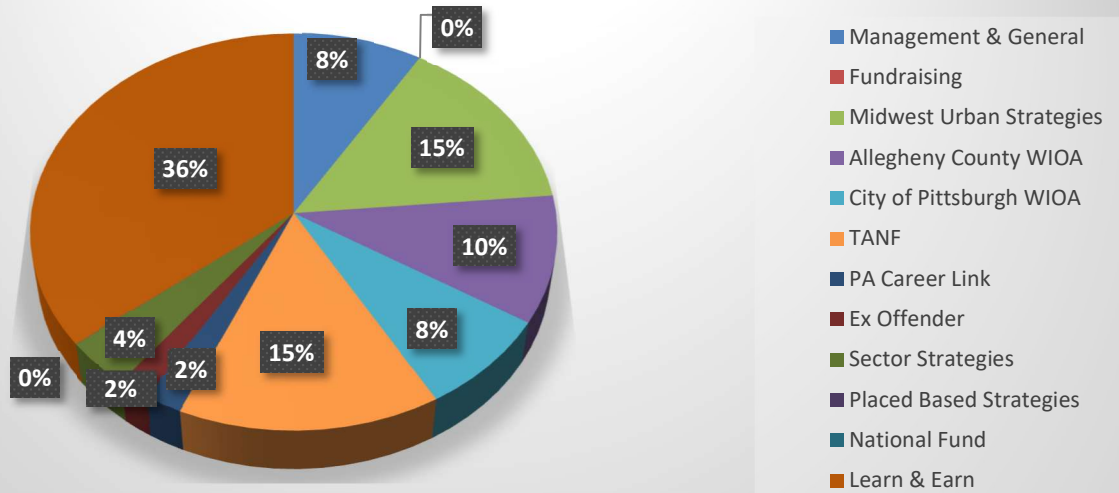


\*Items over 90+ days: Learn & Earn - \$1,582,575;  
PA Career Link - \$107,064; Employ Milwaukee - \$97,485

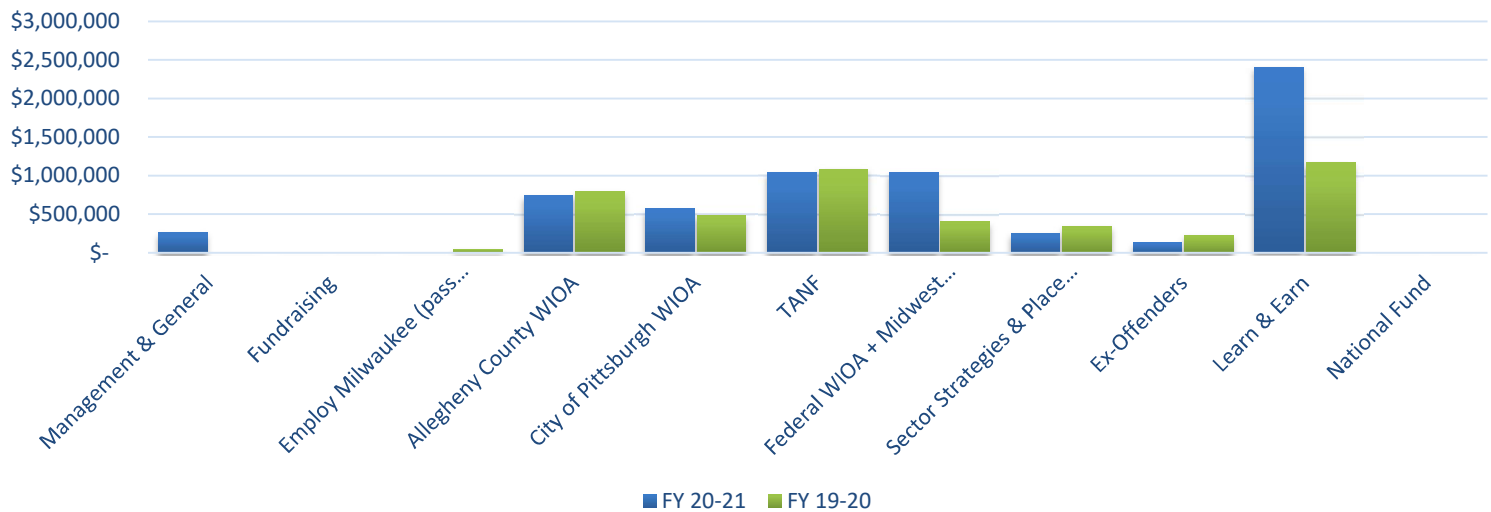
\*\*Misc - \$207,701; M&G - \$150,000; Sector Strat.- \$809,849; Place Based Strat - \$83,735; Adult TANF - \$3,587,244; L&E - \$2,872,634  
This is reflective of activity through 7/1/2020

**Income and Expenses**

**Total Partner4Work Expenditures - \$6,581,885**



**Expense Comparison FY 20-21 vs. 19-20**



-WIOA grants are about \$32K above prior year. Program reports that both our Title I providers are ahead of this time last year.  
 -TANF funding is \$47K less than prior year because our referrals are low, which we do not have control over. They are assigned by the County Assistance Office.  
 -Federal WIOA & MUS grants have increased \$600K above prior year. We are on the last stretch of this program, it ends 3/31/21. The program had a slower start, however has picked up and moving to a strong finish.  
 -L&E program increased about \$1.2M from prior year. This is a timing difference from prior year. I don't believe all expenditures were included in prior year numbers until the 2<sup>nd</sup> quarter. When I project through 12/31, the programs are in line, with this year being about \$600K less due to navigating COVID during the Summer Learn & Earn Program.

Comments: Cash balance has reduced from 6/30/20 and is more in line, as we spend the temp restricted funds, the balance will decrease. Regarding our A/R, we have signed 2 settlement agreements for \$90,427. We have signed the MOU with the City for Learn & Earn \$1.5M and are hoping to see these funds soon. We are working on collecting the other A/R items > 90 days. Net Income is a deficit primarily due to the releasing of temp restricted funds for the Summer Learn & Earn activity. Management & General expenditures are at 8.7%. This is higher than our usual because we've been utilizing the Paycheck Protection Program Loan and have it recorded under M&G, which is increasing the expense under M&G and reducing expenditures on other programs. We have used the remainder of the Paycheck Protection Program Loan to reduce expenses for Salary, Healthcare and Rent in the amount of \$242,000 as of 9/30/2020. \*\*We will be applying for the forgiveness as soon as the application is available through PNC Bank and anticipate full forgiveness.

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*Chief Executive Officer*

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Database Specialist

**Crystalline Barger**  
Manager of Youth Work Experience

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Youth Program Coordinator

**Mayada Christiansen**  
Director of Youth  
Programs

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Apprenticeship Manager

**Dillon Corbridge**  
Data Coordinator

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Compliance Specialist

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PULSE Fellow

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Learn & Earn Manager

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**LaDonna Dutton**  
Executive Assistant

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Coordinator of Strategic Initiatives

**Toni Felice**  
Data and Evaluation Manager

**Carolyn Ford**  
Contracts Administrator

**Nancy Frederick**  
Contracts Manager

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Operations/Facilities Manager

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Chief Financial Officer

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Program Manager, Adult Workforce  
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Director of Industry Strategy

**Markese Long**  
Director of Outreach and Inclusion

**Kristine Masta**  
Director of Development

**Cory Matz**  
IT Specialist.

**Kelly McGuire**  
Communications Manager

**Jesse McLean**  
Youth Programs Manager

**Jack Mills**  
Chief Strategy and Innovation  
Officer

**Dillon Moore**  
Director of Policy

**Franklin Mosley**  
Receptionist

**Jennifer Pajewski**  
Chief of Staff

**Susie Puskar**  
Chief Program Officer

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Director of Workforce Innovation

**Kris Roper**  
Accounting Manager

**Jonathan Ross**  
Subrecipient Compliance Manager

**Andy Smith**  
Director of Adult Workforce Programs

**Phoebe Swe**  
PULSE Fellow

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Development and Industry  
Partnership Specialist

**Tony Townsend**  
Industry Partnership Developer

**Rebecca Varo**  
Compliance Specialist

**Sharon Watkins**  
MUS Compliance Manager

**Wendy Weiskircher**  
Director of Human Resources

**Spencer Witt**  
Junior Accountant

**Eva Wright**  
Contracts Specialist

**Bonny Yeager**  
Manager of Special Projects

**Monique Yost**  
Program Coordinator, Adult  
Workforce Services

## PA CAREERLINK® PITTSBURGH/ALLEGHENY COUNTY SYSTEM

### COMPREHENSIVE CENTERS

#### **Allegheny East**

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

#### **Downtown Pittsburgh**

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

### REGIONAL CENTERS

#### **Alle-Kiski**

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

#### **Mon Valley Regional**

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



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

#### **Mission**

Lead the development, integration, and implementation of a world-class workforce development system in Pittsburgh and Allegheny County.

#### **Vision**

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

#### **Values**

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

#### **Partner4Work**

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*Equal Opportunity Employer*

*Auxiliary aids and services are available upon request. Reasonable accommodations can be made when requested in advance. Please call (412) 552-7090 or email [info@partner4work.org](mailto:info@partner4work.org) with your request.*

