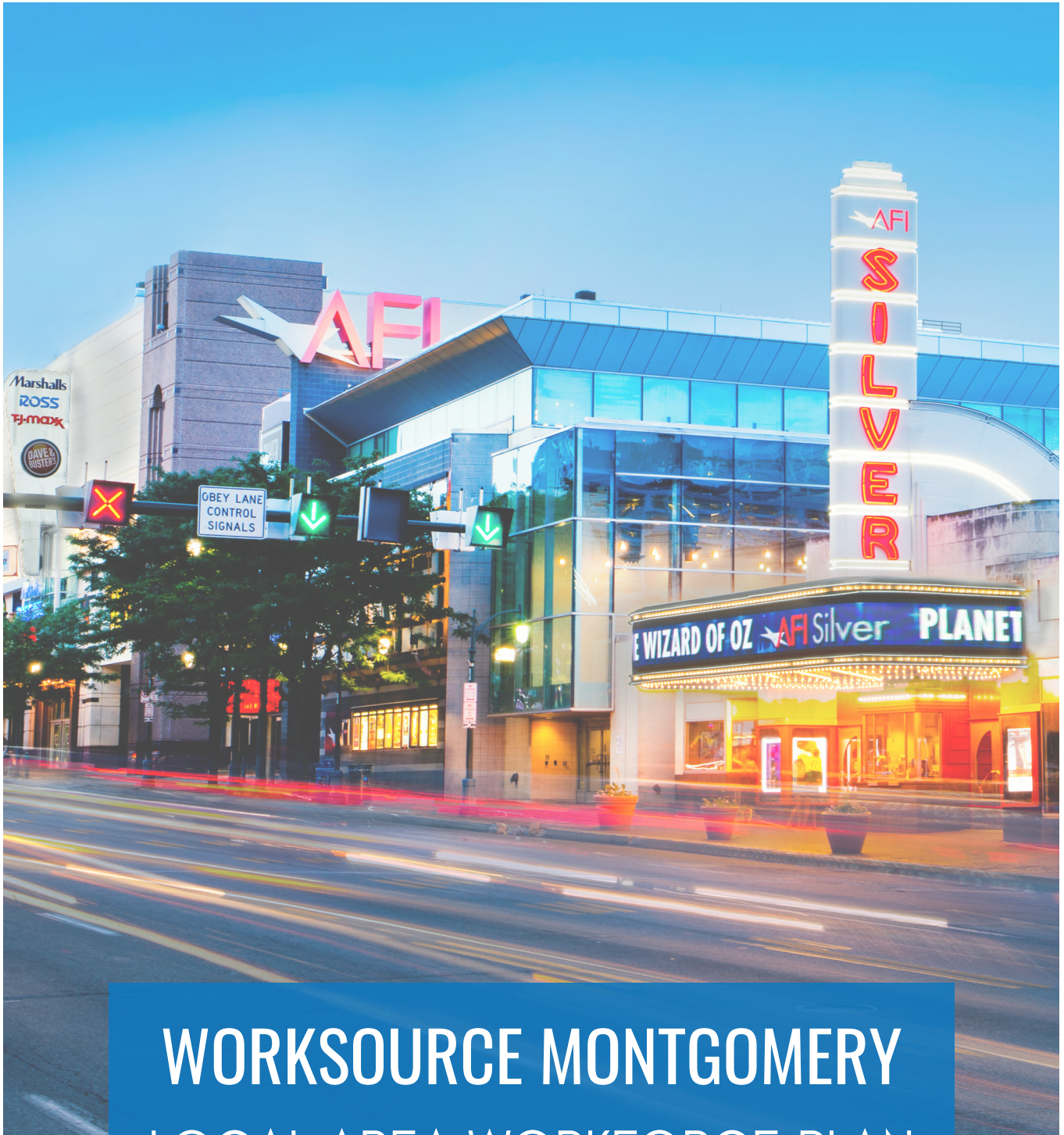




**WorkSource**  
MONTGOMERY  
*Connecting Employers & Job Seekers*



**WORKSOURCE MONTGOMERY**  
**LOCAL AREA WORKFORCE PLAN**  
**2020-2024**

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## INTRODUCTION

### INTRODUCTION TO THE PLAN

The Workforce Innovation and Opportunity Act (WIOA) was signed into law on July 22, 2014 and went into effect July 1, 2015. WIOA supersedes the Workforce Investment Act of 1998 and amends the Adult Education and Family Literacy Act, the Wagner-Peyser Act, and the Rehabilitation Act of 1973. WIOA is designed to help both job seekers and businesses. WIOA addresses the needs of job seekers by establishing a workforce system that helps them access education, training, and supportive services to gain employment and succeed in the labor market. WIOA also addresses business needs by matching them to the skilled workers they need to compete in the global economy.

In order to ensure Maryland's effective implementation of the requirements of the new federal law, the WIOA partners agreed on the development and implementation of proven best practices and strategies towards system improvement. Montgomery County developed its own Local Workforce Development Plan that outlines the vision, objectives, and strategies for WIOA implementation in the Local Area.

This Plan is in line with the Combined State Workforce Plan, which has a vision of a Maryland where every person maximizes his or her career potential and businesses have access to the human resources they need to be successful.

The implementation of the Plan will also be governed by the principals outlined by County Executive Marc Elrich in his vision for a more equitable and inclusive Montgomery County that includes:

- Thriving youth and families
- A growing economy
- A greener county
- Easier commutes
- A more affordable and welcoming county for a lifetime
- Safe neighborhoods
- Effective, sustainable government

Montgomery County has a proud history of developing supportive government and community programs to help employers, as well as job seekers who may be unemployed or underemployed. By supporting a strong, coordinated workforce ecosystem in the county, employers and job seekers will be able to utilize and leverage the system to grow and maintain a strong economy based on quality talent more effectively. WorkSource Montgomery, its board, and the Workforce Development Board (WDB) reflect Maryland's vision as they convene and facilitate the coordination of workforce services and develops new services to:

- Maximize access to employment;
- Maximize access to/use of skills and credentialing;
- Maximize access to/use life management skills;
- Eliminate barriers to employment; and,
- Strengthen and enhance the effectiveness and efficiency of Maryland's workforce system.

The Board for WorkSource Montgomery provides oversight of operations for the non-profit organization while the WDB directs the policies and established the workforce development vision for the county. Together, these boards direct a robust system of talent development aligned to the future and current economic development priorities within the county. The system established as part of this plan places responsibility for the county's workforce system in the hands of business leaders, community stakeholders, and partner agencies.



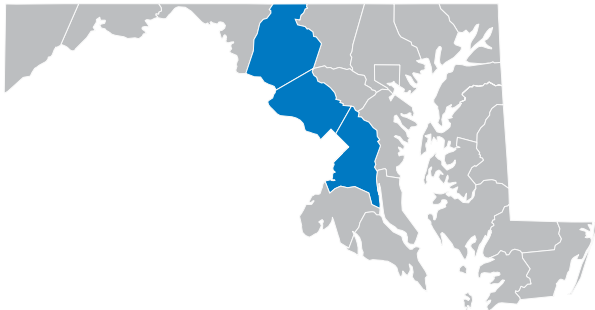
## SECTION I

### ECONOMIC ANALYSIS

#### REGIONAL ECONOMIC CONDITIONS

Montgomery County is in the Silver Spring-Frederick-Rockville, MD statistical division and is a part of the Washington-Arlington-Alexandria, DC-VA-MD-WV statistical area (Capital Region), which creates a dynamic economic landscape. The region, which includes Frederick, Montgomery, and Prince George's Counties, is influenced economically by federal government and their contractors as well as a large science and engineering base. The Washington, D.C. metro area is routinely ranked as one of the country's top high-tech and start-up centers and provides a hotbed of research universities, think tanks, and nonprofit organizations. In addition, the region is a top international tourism destination, which fuels robust hospitality sectors in the area.

Montgomery County has had steady population growth from 2015-2020, which was mirrored by steady jobs growth until the 2020 global health crisis. Between 2015 and 2019, the county had gained over 17,000 residents and 13,000 jobs. However, during the COVID-19 pandemic, all job growth was erased,

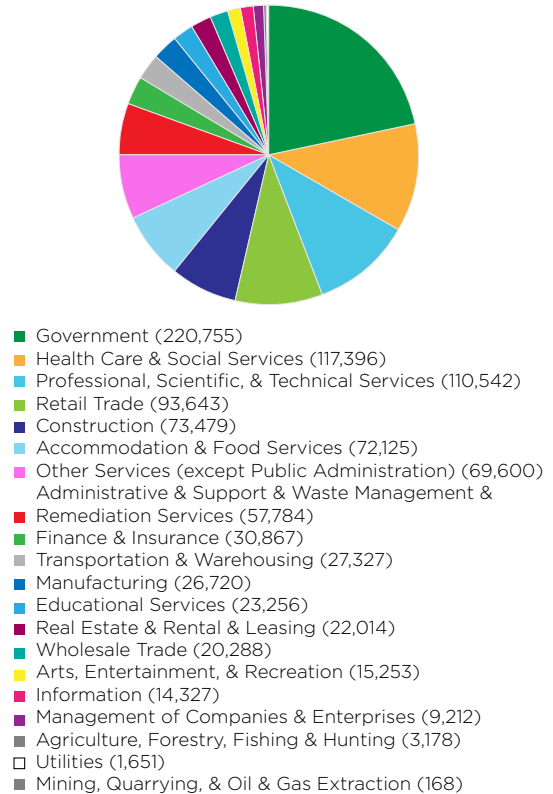


resulting in a net loss of 1,615 jobs from 2015-2020. While the full economic and employment effects of the 2020 pandemic are still unknown, Montgomery County is projected to return to pre-pandemic employment numbers around the year 2025. Despite the pandemic, there were 28,462 job openings in Montgomery County from March 2020 to February 2021.

These data and projections are largely aligned with those of the Capital Region in which the pandemic's effect eliminated nearly all of the job growth of the previous five years resulting in a slight jobs increase of .9% from 2015-2020. The Capital Region is also projected to return to 2019's pre-pandemic jobs numbers by 2025. Both the Capital Region and Montgomery County are projected to show steady population growth over the next five years. The labor

force participation rate for the Capital Region and Montgomery County had been trending to the positive from 2016 to 2019. However, in both cases, that number steadily decreased throughout 2020, reaching 63.69% and 65.14% respectively by December of that year.

**Capital Region Jobs by Industry, 2020**



#### REGIONAL INDUSTRY SNAPSHOT

The largest industry sector in the Capital Region is Government/Public Administration with 220,755 jobs in 2020, followed by Health Care and Social Assistance with 117,396 jobs. The next-largest sectors in the region are Professional, Scientific, Technical Services (110,542 jobs), Retail Trade (93,643), and Construction (73,479). High location quotients (LQs) indicate sectors in which a region has high concentrations of employment compared to the national average. The sectors with the largest LQs in the region are Professional, Scientific, and Technical Services (1.64), Government (1.45), Non-Public Administration Services (1.32), and Construction (1.30).

## SECTION I

Sectors in the Capital Region with the highest average wages per worker are Management of Companies and Enterprises (\$166,387), Finance and Insurance (\$140,923), Utilities (\$140,376), and Manufacturing (\$123,360). Regional sectors with the best job growth from 2015-2020 are Health Care and Social Assistance (+6,885 jobs), Transportation and Warehousing (+6,674), Professional, Scientific, and Technical Services (+5,354), and Construction (+4,421).

In terms of new jobs added, the fastest growing sector in the Capital Region is Health Care and Social Assistance, growing by 6% throughout 2020 and adding over 4,500 jobs. Professional, Scientific, and Technical Services (3,772 new jobs) and Transportation and Warehousing (3,229) demonstrated the second- and third-most growth respectively.

**1,058,494** Population (2021)

Population grew by 49,576 over the last 5 years and is projected to grow by 38,171 over the next 5 years.

**534,196** Population (2021)

Jobs grew by 20,099 over the last 5 years and are projected to grow by 17,714 over the next 5 years.

**\$106.2k** Median Household Income (2021)

Median household income is \$45.0k above the national median household income of \$55.3k.

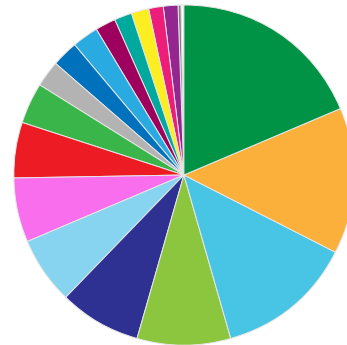
Employment in the Capital Region is projected to expand by almost 8,000 jobs over the next year and by almost 35,000 jobs by 2025. The strongest forecast by number of jobs over the next five years is for Health Care and Social Assistance (+11,174 jobs), followed by Government/Public Administration (+8,651), and Professional, Scientific, and Technical Services (+5,652), and Transportation and Warehousing (+3,712).

### REGIONAL-LOCAL INDUSTRY ALIGNMENT

There is a strong alignment between the targeted industries identified in the Maryland State plan, Capital Region plan, and the Montgomery County

local plan. Much like the Capital Region, the largest industries in Montgomery County are Government/Public Administration (99,468 jobs in 2020), Professional, Scientific, and Technical Services (75,056 jobs), and Health Care and Social Assistance (69,933 jobs).

**Montgomery County Jobs by Industry, 2020**



- Government (99,468)
- Professional, Scientific, & Technical Services (75,056)
- Health Care & Social Assistance (69,933)
- Other Services (except Public Administration) (46,762)
- Retail Trade (42,296)
- Administrative & Support & Waste Management & Remediation Services (33,544)
- Accommodation & Food Services (32,740)
- Construction (28,587)
- Finance & Insurance (20,379)
- Real Estate & Rental & Leasing (13,586)
- Educational Services (13,334)
- Manufacturing (13,279)
- Information (10,239)
- Transportation & Warehousing (9,137)
- Arts, Entertainment, & Recreation (8,766)
- Wholesale Trade (7,777)
- Management of Companies & Enterprises (6,906)
- Agriculture, Forestry, Fishing & Hunting (1,738)
- Utilities (609)
- Mining, Quarrying, & Oil & Gas Extraction (58)

Some of Montgomery County's largest industries are also its fastest growing. The Health Care and Social Assistance sector grew by over 4,500 jobs between 2015 and 2020, a 7% increase, and is projected to add another 6,800 jobs by 2025. Professional, Scientific, and Technical Services, the county's second-largest industry, gained over 3,700 jobs. By percentage, the sector with the largest growth over the past five years was the Agriculture, Forestry, Fishing, and Hunting industry, with an 239% increase in jobs over span. Additionally, jobs in the Transportation and Warehousing increased by 55%, adding over 3,000 jobs in that past five years. This growth is expected to continue, with another 21% increase by 2025.

## SECTION I

A more detailed investigation into one of Montgomery County's top industries gives further insight into potential areas of focus for establishing strategic priorities. Within the Professional, Scientific, and Technical Services industry, the largest subsector of Computer Systems Design Services (NAICS code 541512) accounts for almost 10% of the jobs in the entire industry and is expected to grow by 10% by 2025, adding over 1,100 jobs. The third-largest subsector, Custom Computer Programming Services, is also related to Information Technology (IT). These factors indicate that IT jobs are an area of focus within this industry sector. The fifth largest subsector, Research and Development in Biotechnology, is expected to grow by 7% by 2025.

### LARGEST SUBSECTORS OF PROFESSIONAL, SCIENTIFIC, AND TECHNICAL SERVICES, 2020

Professional, Scientific, & Technical Services Industry (NAICS code 54) Subsector	2020 Jobs	Projected % Change 2020-2025
Computer Systems Design Services	11,493	10%
Administrative Management & General Management Consulting Services	8,962	6%
Custom Computer Programming Services	6,589	(0%)
Engineering Services	5,949	12%
Research & Development in Biotechnology (except Nanobiotechnology)	5,866	7%
Offices of Lawyers	4,968	1%
Research & Development in the Social Sciences & Humanities	4,954	(0%)
Research & Development in the Physical, Engineering, & Life Sciences (except Nanotechnology & Biotechnology)	4,337	7%
Other Scientific & Technical Consulting Services	2,667	22%
Offices of Certified Public Accountants	2,616	(3%)

Source: EMSI, 2021.2

Montgomery County is considered an epicenter of biotechnology and has emerged as a life sciences hub. The county is home to over 180 biotech companies, 5,000 highly educated biotech workers, and key federal research and regulatory institutions, such as the National Institutes of Health (NIH), the Federal Drug Administration (FDA), the National Institute of Standards of Technology (NIST), and the Walter Reed Army Institute.

Cybersecurity and Biotechnology are two industry sectors in high demand within Montgomery County, though they are not well categorized by traditional labor market information due to the fact that many of these occupations are not easily categorized. There are key occupations in these sectors, however, as demonstrated in the following two tables.

### IN-DEMAND & GROWTH OCCUPATIONS

Focusing on occupations that require some level of postsecondary education and training for Montgomery County's largest industries can give further insight into developing strategic priorities for the local Workforce Development Board.

In Health Care and Social Assistance, Registered Nurses and Nursing Assistants are the top two jobs in the industry, accounting for 8.4% and 7.8% of industry jobs respectively. Both are also among the top six occupations expected to add the most jobs in any industry by 2025 when filtering for jobs requiring some postsecondary education or training.

## SECTION I

### TOP OCCUPATIONS OF PROFESSIONAL, SCIENTIFIC, & TECHNICAL SERVICES, 2020

Professional, Scientific, & Technical Services Industry (NAICS code 54) Staffing Patterns	2020 Jobs	% of Total Jobs in Industry
Software Developers & Software Quality Assurance Analysts & Testers	4,422	5.9%
Management Analysts	3,904	5.2%
Accountants & Auditors	2,837	3.8%
Lawyers	2,562	3.4%
Computer Systems Analysts	2,294	3.1%
General & Operations Managers	2,134	2.9%
Project Management Specialists & Business Operations Specialists, All Other	1,971	2.6%
Computer & Information Systems Managers	1,608	2.2%
Sales Representatives of Services, Except Advertising, Insurance, Financial Services, & Travel	1,555	2.1%
Secretaries & Administrative Assistants (except Legal, Medical, & Executive)	1,521	2.0%
Market Research Analysts & Marketing Specialists	1,486	2.0%
Computer User Support Specialists	1,400	1.9%
Network & Computer Systems Administrators	1,383	1.8%
Medical Scientists (except Epidemiologists)	1,360	1.8%
Computer Occupations, All Other	1,280	1.7%

Source: EMSI, 2021.2

In Professional, Scientific, and Technical Services, the top occupation is Software Developers and Software Quality Assurance Analysts and Testers. This occupation accounts for 5.9% of the entire industry in 2020 and is projected to add another 467 jobs and grow by 11% by 2025. The most common job title for this occupation is “software engineer” and typically requires a bachelor’s degree. According to job posting data, the top qualification listed for this occupation is CompTIA Security+, Microsoft Certified Systems Engineer, and Certified Information Systems Security Professional—all of which indicate a strong correlation between this in-demand job and the industry subsector known colloquially as “cybersecurity.” Additionally, the occupation Information Security Analysts, one more directly linked to cybersecurity, is expected to grow by 16% from 2020 to 2025 and is among the occupations with the largest projected growth in the industry over that timeframe. In total, Information Technology (IT) occupations account for over 20% of all occupations in the Professional, Scientific, and Technical Services Industry, with top over 16,600 jobs in 2020.

## SECTION I

### TOP OCCUPATIONS OF R&D IN BIOTECHNOLOGY, 2020

Research and Development in Biotechnology (NAICS code 541714) Staffing Patterns	2020 Jobs	% of Total Jobs in Industry
Medical Scientists (except Epidemiologists)	716	12.1%
Natural Sciences Managers	398	6.7
Biological Scientists, All Other	269	4.5%
Microbiologists	213	3.6%
Statisticians	182	3.1%
Software Developers & Software Quality Assurance Analysts & Testers	176	3.0%
Biological Technicians	170	2.9%
Chemists	170	2.9%
Project Management Specialists & Business Operations Specialists, All Other	154	2.6%
Physicists	146	2.5%
General & Operations Managers	126	2.1%
Personal Service Managers; Entertainment & Recreation Managers	109	1.8%
Mechanical Engineers	106	1.8%
Computer Systems Analysts	85	1.4%
Computer & Information Systems Managers	82	1.4%

Source: EMSI, 2021.2

The prevalence of computer occupations in the biotechnology sector shows a cross-over into IT with such fields as bioinformatics and health IT/mobile health applications. The WDB continues to develop strategies to prepare job seekers for these key occupational groups.

As was the case across the entire country, retail and hospitality sectors were some of the hardest hit by the COVID-19 pandemic. The Accommodation and Food Services industry in Montgomery County alone lost more than 6,600 jobs from December of 2019 to December of 2020, the largest decrease in any industry in the county. Despite these losses, Accommodation and Food Services remains the seventh largest industry in the county, with just under 30,000 jobs by the end of 2020. This industry is a crucial part of the economy in Montgomery County and the Capital Region and is poised for significant growth and return to pre-pandemic numbers.

As in years past, construction will remain a priority industry for workforce development in Montgomery County. Not only is construction one of the largest employing industries for the county's Latino population (26.8% of all construction jobs were held by Latinos in 2020), but it is also responsible for generating \$2.8 billion in earnings and \$49.8 million in taxes in 2020. Although there has been a slow decrease in the number of jobs in construction over the past five years, the industry remains relatively stable, consistently employing over 28,000 workers.

### WDB Strategic Priorities

In setting the strategic priorities for WorkSource Montgomery, the Board has emphasized analyzing trends of our growth industries and providing employment services to Montgomery County residents who are enhancing or pursuing careers in these industries.

The WDB will focus efforts on analyzing trends within these subsectors and providing services and industry-led initiatives targeted within these sectors. This data shows a complex and dynamic economic landscape that will guide employment and training activities in the county.



## SECTION I

Based on a compilation of data, the key industries WSM will target are:

- 1. Professional, Scientific, and Technical Services (with a focus on Cybersecurity/IT)**
- 2. Biotechnology/Life Sciences**
- 3. Healthcare and Social Assistance**
- 4. Hospitality (including Retail, Accommodation, and Food Service)**
- 5. Construction**

These target industries reflect the general trends noted in Maryland's 2020-2024 WIOA State Plan, in which all five are represented as top existing or in-demand industries for the Capital Region.



## SECTION II

### STRATEGIC PLANNING TO MAXIMIZE THE EARNING CAPACITY OF MARYLANDERS

The vision for the State of Maryland, as laid out in the State Workforce Plan and the Benchmarks of Success, is to increase the earning capacity of Marylanders by maximizing access to employment, skills and credentialing, life management skills, and supportive services. The vision requires the State to strengthen and enhance the effectiveness and efficiency of Maryland's workforce system. The first four Strategic Goals of the Benchmarks of Success are to:

- 1. Increase the earning capacity of Maryland's workforce system customers by maximizing access to employment;**
- 2. Increase the earning capacity of Maryland's workforce system customers by maximizing access to and use of skills and credentialing;**
- 3. Increase the earning capacity of Maryland's workforce system customers by maximizing access to and use of life management skills; and**
- 4. Increase the earning capacity of Maryland's workforce system customers by eliminating barriers to employment.**

In alignment with the Benchmark of Success, WorkSource Montgomery's (WSM) strategic plan enhances the effectiveness and efficiency of the Maryland workforce system in the implementation of the following:

- A communication and engagement campaign for each targeted industry sector, to educate employers about WDB's role, its value-added proposition and services, and how it engages them more fully as partners.
- Creation of programs that uniquely strengthen talent pools with industry-defined qualified candidates.
- Access for job seekers to quality-aligned skill building and career development programs through customer focus services by addressing holistic career seeker need to help eliminate barriers to employment.
- Targeted quality education and training services that provide access to skills and credentialing.
- A commitment to catalyzing change within the community, to build an effective talent development system by assessing and driving continuous improvement of the American Job

Center's capacity and performance.

- Development and implementation of a resource diversification strategy, including finalizing general goals, specific targets, and action plans.
- Assessment and continuous improvement of multi-platform communication infrastructure and activities.
- Assessment and continuous improvement of data and quality assurance infrastructure and activities.

WSM and the Workforce Development Board's (WDB) strategic plan is supported by analysis of the workforce in the region, including current/future labor force, employment/unemployment data, labor market trends, and the educational and skill levels of the workforce in the region, including individuals with barriers to employment. The occupational analysis enables WSM to target the regional needs of employers and opportunities for job seekers to maximize employment and earning opportunities. Additionally, it has afforded WSM the opportunity to work with educational partners to identify new and modify existing training services that meet the needs of employers by developing skills, credentialing opportunities, and career pathways.

WSM and the WDB's membership structure and operational strategies maximize efficiency and effectiveness by:

- Maximizing access to employment;
- Maximizing access to/use of skills and credentialing;
- Maximizing access to/use life management skills;
- Eliminating barriers to employment; and,
- Strengthening and enhancing the effectiveness and efficiency of Maryland's workforce system.

WSM, under the guidance of the WDB, have created industry alliances for each approved sector and have developed corresponding programming. The WDB has established an Operations Committee to provide oversight and set priorities for all industry sector activities. To date, the WDB has established five employer-led Industry Alliances in high-demand and high-growth industries: Biotechnology/Life Sciences, Hospitality, Construction, Health Care and Cyber/IT. These alliances are engaged or will be engaged in advising on the development of career pathways and identification of skills and solutions needed within their industry to ensure a robust talent pipeline.

WorkSource Montgomery has designed and

## SECTION II

continues to implement a sustainable industry-led talent development model to support industry-led partnerships. Using experience with industry alliances and the EARN Maryland grant as a model, WSM cultivates industry-sector partnerships. Strategies to enhance innovative initiatives to address employability needs as defined by the local planning focus group:

- Conduct quarterly partner forums designed to share best practices being used within partner organizations and to design system-wide processes.
- Increase the use of technology on two fronts: 1) to increase the effectiveness of system and process management across partners, and 2) to increase access and effectiveness in customer interfacing processes and services.
- Improve effectiveness and integration of processes across the system using customer relationship management systems, dashboards and common databases.
- Improve the customer’s experience through of virtual one-stop platforms, communication and engagement through social media, and expanded electronic resources.
- Continue and expand current industry-led employability career pathway models.
- Expand Work-Learning experiences through strategic partnerships.

WSM is also an active participant in the EARN Maryland grant to cultivate additional opportunities for industry sector strategies. WSM will continue to secure additional funding streams, such as the COVID Dislocated Workers Grant and the Older Workers Grant, to address specific needs in the community.

WSM will continue to seek discretionary funding to maintain and expand industry-led initiatives. The WDB has developed and continues to refine an industry-led approach to employment and training services in the county. WDB balances labor market data analysis with real-time feedback from the employer community. A demand for high educational levels among Montgomery County employers can be seen across industry sectors. Within the Biotechnology industry cluster, for example, high educational attainment is a requirement for many of the positions.

### IN-DEMAND INDUSTRY-SECTOR & KNOWLEDGE & SKILLS ANALYSIS

An analysis of job postings data can result in the identification of the most in-demand skills within each target industry sector. The listings below includes the five most frequently occurring hard skills, common skills, and qualifications listed for Montgomery County job postings for the year 2020. Hard skills refer to “unique or technical skills related to a specialty.” Common skills refer to “soft or human skills which are broad statements of ability.”

#### PROFESSIONAL, SCIENTIFIC, & TECHNICAL SERVICES

Top Hard Skills	Top Common Skills	Top Qualifications
Agile Methodology	Communications	Project Manager Professional Certification
Computer Science	Management	Master’s in Business Administration
Programming Languages (Python, Java, or SQL)	Research	Certified Information Systems Security Professional
Data Analysis	Leadership	CompTIA Security+
Automation	Operations	ITIL Certifications/GIAC

## SECTION II

### BIOTECHNOLOGY/LIFE SCIENCES<sup>1,2</sup>

Top Hard Skills	Top Common Skills	Top Qualifications
Biology	Research	Doctor of Pharmacy (PharmD)
Clinical Trials	Communications	Doctor of Medicine (MD)
Data Analysis	Management	Medical License
Biochemical Assays	Presentations	Master of Business Administration (MBA)
Molecular Biology	Leadership	Medical Technologist

### HEALTH CARE & SOCIAL ASSISTANCE

Top Hard Skills	Top Common Skills	Top Qualifications
Nursing	Communications	Certified Nursing Assistant
Basic Life Support	Management	Bachelor of Science in Nursing
Cardiopulmonary Resuscitation (CPR)	Research	Licensed Practical Nurse (LPN)
Rehabilitation	Leadership	Licensed Clinical Social Worker (LCSW)
Home Care	Operations	Nurse Practitioner (NP)

### HOSPITALITY<sup>3</sup>

Top Hard Skills	Top Common Skills	Top Qualifications
Change Management	Management	Master of Business Administration (MBA)
Customer Satisfaction	Communications	Certified Information Systems Security Professional
Auditing	Leadership	Certified Information Security Manager
Service Provider	Operations	Certified Information System Auditor (CISA)
Budgeting	Planning	Cisco Certified Network Professional

### CONSTRUCTION

Top Hard Skills	Top Common Skills	Top Qualifications
Subcontracting	Communications	Master of Business Administration (MBA)
HVAC	Management	Commercial Driver's License (CDL)
Accounting	Customer Service	LEED Accredited Professional (AP)
Construction Management	Operations	Project Management Professional Certification
Plumbing	Sales	Bachelor of Science in Business

1 Biotechnology is a difficult field and set of occupations to fully construct when only using LMI data. For the purposes of identifying in-demand knowledge and skills, the following SOC codes for life sciences were used: 19-1010 Agricultural and Food Scientists; 19-1020 Biological Scientists; 19-1030 Conservation Scientists and Foresters; 19-1040 Medical Scientists; 19-1090 Miscellaneous Life Scientists.

2 These findings represent jobs postings data taken from Montgomery County, Maryland between December 2018 and November 2019. This timeframe was chosen to remove the possible bias of COVID-19-related research and other hiring.

3 6-digit NAICS industry codes used for Hospitality: 72-1120 Casino Hotels; 72-1191 Bed-and-Breakfast Inns; 72-1199 All Other Traveler Accommodation; 72-1110 Hotels and Motels; 72-1211 RV Parks and Campgrounds, Recreational and Vacation Camps 72-1214.

## SECTION II

### LABOR FORCE ANALYSIS

Montgomery County is the most populous county in the State of Maryland and is one of the most affluent counties in the United States with over 35% of households reporting an annual income of over \$150,000. However, with 33.8% of households earning less than \$75,000 per year in a county with a very high cost of living<sup>4</sup> and rising housing costs, there is still a large segment of the population facing difficult living situations. The median gross rent for the county is approximately \$1,768 per month, over \$700 higher than the national average.

#### ANNUAL HOUSEHOLD INCOME DISTRIBUTION<sup>5</sup>

Annual Households	% of Households
\$0 - \$25,000	9%
\$25,000 - \$50,000	12.2%
\$50,000 - \$75,000	12.6%
\$75,000 - \$100,000	12%
\$100,000 - \$150,000	18.7%
\$150,000 - \$200,000	12.6%
\$200,000+	22.8%

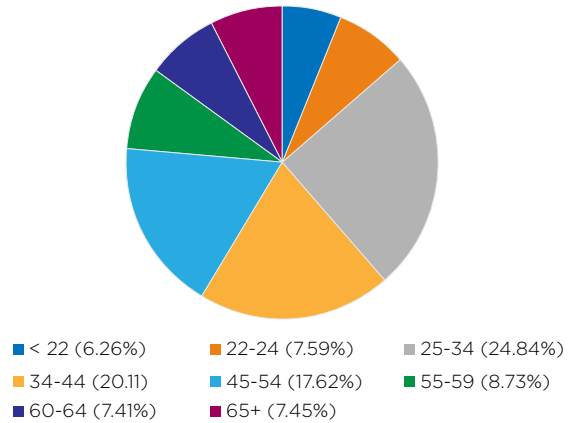
### UNEMPLOYMENT

Despite the concentration of affluence in Montgomery County, the area was still affected by the rise in unemployment related to the COVID-19 pandemic. During October of 2020, the peak of the economic effects on employment, Montgomery County posted an unemployment rate of 7.42%. By the end of the year, that rate had dropped to 5.7%. It is estimated that the county will return to pre-pandemic jobs numbers around 2025.

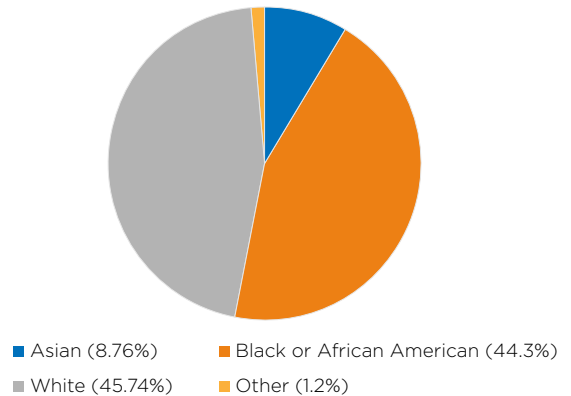
In 2020, Montgomery County's total population of working age individuals (aged 15 years and older) was 853,114. Of these, 532,257 (62.4%) were considered a part of the labor force, meaning they were employed or unemployed but seeking work. Individuals unemployed but making specific effort to find employment at the end of 2020 totaled 33,777, or 6.35% of the labor force.

In February of 2021, of the 30,264 unemployed individuals in the county, 44% identified as Black or African-American, 51% were females, and 24.8% were between the ages of 24 and 34.

Unemployment by Age



Unemployment by Race



<sup>4</sup> City-data.com listed the "cost of living index" for Montgomery County in March of 2019 as "very high" - 185.6 compared to the national average of 100.  
<sup>5</sup> <https://www.usnews.com/news/healthiest-communities/montgomery-county>



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**EDUCATIONAL ATTAINMENT**

Montgomery County residents are among the most highly educated in the country with nearly 59% of adults aged 25 and older possessing a Bachelor’s, Graduate, or Professional degree. Montgomery College is the largest degree-granting institution in the county with just over 3,000 total graduates in 2019. Other post-secondary institutions combined for a total of 585 graduates, most of which were granted by Washington Adventist University (264 graduates in 2019) and Columbia Institute (110). In total, Montgomery County educational institutions graduated 315 fewer students in 2019 than in 2017. While the full effect of the COVID-19 pandemic on enrollment and graduations will not be fully known for a few years, the release of 2020 numbers will give an early indication of how significant that effect has been.

Despite the extraordinarily high levels of educational attainment in the county, these statistics are not proportionate across race and ethnicity. According to U.S. News and World Reports rankings, the county scores particularly low in equity among neighborhood and racial disparity in educational attainment. Of the 9% of adults (25 years of age and older) who do not possess a high school diploma, 58% are Hispanic despite this group comprising 19.5% of the county’s population. Furthermore, 15% of residents holding a college degree are Black or African American, a racial group comprising 18.5% of the county’s population.<sup>6</sup>

**INDIVIDUALS WITH BARRIERS TO EMPLOYMENT**

Veterans

Multiple populations in Montgomery County face barriers to employment beyond unemployment and low educational attainment. In 2019, over 40,000 veterans resided in Montgomery County, totaling 5.1% of the adult population (over 18 years of age). In general, Montgomery County’s veterans achieved higher levels of education than the nonveteran population with 23.2% completing some college or an Associate’s degree and 62.5% earning a Bachelor’s degree or higher.

Veterans had a significantly higher rate of disability

(20.3%) than did nonveterans adults (9.2%). As of 2019, a smaller percentage of veterans reported income levels below the poverty line (3.1%) than did nonveterans (6.5%) and the veteran unemployment rate (3.2%) was below that of nonveterans (4.5%). These numbers are likely to have been significantly affected by the COVID-19 pandemic, however.

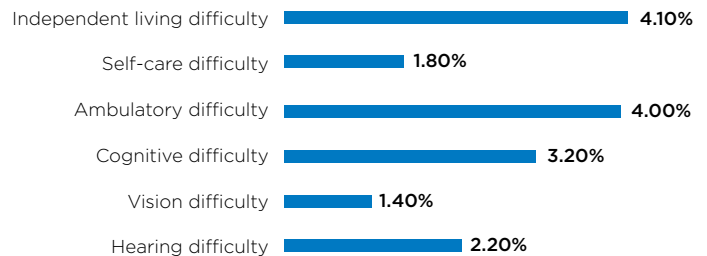
Speakers of Non-English Languages

According to Census Bureau estimates, English is the only language spoken in just 58.8% of Montgomery County homes, compared to 79.4% nationwide. Of the households in which English is not the only language spoken, 17.1% speak Spanish, 9.4% speak Asian and Pacific Islander languages, and 10% speak other Indo-European languages.<sup>7</sup> While these numbers do not necessarily suggest a higher-than-average number of English language learners in the county or a substantial number of individuals facing substantial cultural barriers, they may suggest some need to identify programs and make resources available to assist these populations.

Individuals with Disabilities

According to 2019 Census data, 8.1% of Montgomery County residents lived with a disability.

**Types of Disabilities in Montgomery County, MD in 2019**



<sup>6</sup> EMSI, Educational Attainment Snapshot for Montgomery County, MD. Data from Q1 2021.

<sup>7</sup> <https://data.census.gov/cedsci/table?q=ACSDP5Y2019.DP02%20Montgomery%20County,%20Maryland&g=0500000US24031&tid=ACSDP5Y2019.DP02&hidePreview=true>

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### Ex-Offenders

Between FY2015 and FY 2019, 668 Montgomery County residents were released from Maryland Department of Corrections custody, an average of about 133 individuals per year. In FY2020 alone, due in-part to increased release rates due to the COVID-19 pandemic, 797 Montgomery County residents were released.<sup>8</sup> Montgomery County is one of six Maryland counties with a local reentry agreement with the Maryland Department of Public Safety and Correctional Services (DPSCS) under which the counties take custody of state-sentenced inmates for the final year of their incarceration. This allows inmates the opportunity to better connect with families and reentry resources and workforce development opportunities in their local communities.

### Low-income Individuals & Families

Although Montgomery County is among the most affluent counties in the country, many residents and families still face low-income, poverty, and resulting difficult living and working conditions. About 6.2% of Montgomery County residents over the age of 18 earn an income below the poverty line. There is a slight increase for those over the age of 65. 4.7% of all families and 8.6% of all children live in poverty.

### Homeless Individuals & Families

Before the pandemic, the number of individuals and families facing homelessness appeared to be in decline. A Point-in-Time survey conducted in January of 2019 showed a 22% decrease in the number of homeless individuals counted from the previous year. The total number of families counted had fallen from 84 in 2017 to 61 in 2019 and the total number of children in families fell by 30% from 2018 to 2019. Again, there is some reason to believe that these numbers were significantly affected by the COVID-19 pandemic, the effect of which may not be known for months or years to come.

### WORKFORCE DEVELOPMENT ACTIVITIES

Montgomery College is a public community college with three campuses located in Montgomery County in Rockville, Germantown, and Takoma Park/Silver Spring and two off-campus sites in Gaithersburg and Wheaton. With a total enrollment of around 60,000 students, it was ranked in 2017 as the third-

largest college in the state. In 2020, Montgomery College's online Associate in Computer Science program was ranked #8 in the country by the website TheBestSchools.<sup>9</sup> The school's other top programs include Nursing and Health Science.

Montgomery County is home to the following Occupational Training Providers:

#### OCCUPATION TRAINING PROVIDERS

WIOA Training Provider	Location	# of Programs
ASM Educational Center, Inc.	Rockville	15
Cybersecurity Training Center	Rockville	4
GapBuster, Inc.	Rockville	1
Human Genome Sciences, Inc.	Rockville	1
Knowledge First Institute	Silver Spring	1
Montgomery College	Silver Spring	12
OST Global Solutions, Inc.	Rockville	1
Per Scholas, Inc.	Silver Spring	3
Smoothstack, Inc.	Rockville	1
The Alliance for Media Arts-Culture, Inc.	Silver Spring	2
Yellow Tail Training, LLC	Silver Spring	1

While WSM works closely with County-based trainers found on the ETPL, the organization does not limit customer choices to this small portion of the available programs. WSM works closely with online providers such as MedCerts to provide healthcare career training and with regional providers such as the Finishing Trades Institute to provide construction pre-apprenticeship and Registered Apprenticeship Training. WSM staff assesses interest, aptitude and accessibility when making a referral to training.

While not all training providers are derived from the State ETPL list, other non approved providers are accessed utilizing non-WIOA funds. WSM braids funding from several public and private sources to deliver programming in the county. Among them are ARPA funds, line items in the Montgomery County budget, grants from MD Labor and private foundations.

<sup>8</sup> Data collected from Maryland Department of Public Safety and Correctional Services and from Maryland Department of Offender Case Management System. [https://www.dpscs.state.md.us/community\\_releases/DPSCS-Community-Releases.shtml](https://www.dpscs.state.md.us/community_releases/DPSCS-Community-Releases.shtml). These data reflect only releases from State custody and do not include data regarding releases from local detention centers.

<sup>9</sup> <https://thebestschools.org/rankings/best-online-associates-computer-science/>

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### OTHER TRAINING CENTERS/OPTIONS

WSM has had an ongoing commitment to serving returning citizens. The WDB and WSM staff understand the positive impact employment can have for the court-involved job seeker and the community. Employment drives recidivism rates downward significantly and when that employment is part of a career path that offers family-sustaining wages, recidivism is driven even lower. Prior to the COVID-19 pandemic, WSM and the Montgomery County Department of Corrections and Rehabilitation partnered to deliver workforce services at the Montgomery County Correctional Facility and Pre-Release Center. WSM staff were embedded in the facilities to deliver work readiness and placement services. Due to COVID, this program has been suspended but the partnership remains active and services will restart as the loosening of current health restrictions allow. In the meantime, WSM is in the process of hiring several Business Services Representatives, some of which have experience in delivering employment services to court involved youth and adults. One of these 2021 hires will be assigned to work with job seekers recently released from DOCR and will also be responsible for working with returning citizens coming from state facilities.

### STRENGTHS & WEAKNESSES

In general, the occurrence of the COVID-19 pandemic has exposed some opportunities for improvement for WSM and area service providers. For example, the increased dependency on remote access has exposed gaps in of language and technology knowledge and skills. There is additional need for improved access to high-speed internet or entry points to virtual services. To address these needs WSM is committed to exploring and utilizing new technologies to increase the reach of services to target populations.

The effects of the COVID-19 pandemic have also led to the expanded use of the workforce system. Newly out-of-work individuals who have been displaced due to the economic fallout from the pandemic have become first-time users of the system, bringing individuals with degrees to seek out services in much greater numbers than in previous years. As a result, some training options have drawn increased attention, such as Project Management Professional (PMP) certifications, and new areas of focus are being identified. This has brought added attention

to developing occupational skills crosswalks and other strategies for aiding high-educated and high-skilled workers, of which Montgomery County has many.

Through input sessions with stakeholders, some additional areas for improvement were identified, including:

- The opportunity to work more closely with area non-profit organizations
- Increasing ease of use for both employers and potential job seekers
- The need to work more closely with employers to determine future skills needs
- Improving public messaging and increasing the knowledge of what programs and services are available to both employers and job seekers.

Stakeholders also identified the need for better collection and communication of data relating to programs, goals, and outcomes.

As part of a larger effort around evaluation and data collection, the new leadership at WSM is currently developing criteria by which to evaluate the performance of current training providers. The team will apply the following methods and standards to inform this analysis:

### Ensure adherence to common WIOA performance measures as reported in MWE.

1. **Collect feedback regarding trainee experience collected through a newly acquired survey tool.**
2. **Collect and analyze information relating to real time performance indicators that support the aggregate data reported in MWE. Examples of the leading indicator data and target completion rates will include (but will not be limited to):**

Measure	Goal
# of individuals enrolled in the program	TBD
% of enrollees completing work experience or training	80%
% of enrollees placed in employment or education at program exit	70%
% of enrollees achieving credential	80%
% of enrollees achieving measurable skills gain	85%
Average wage at placement	\$15.00/hr*

\*Statutory minimum wage in Montgomery County

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It is the belief of the WSM Board and leadership that continued efforts to identify and collect additional evaluation criteria will allow for the continuous improvement of area service providers and the workforce development system as a whole. Furthermore, the collection of these data, in addition to the presence of WSM monitoring, will result in the timeliness and accuracy of both programmatic and fiscal reporting and invoicing.

### STRATEGIC VISION

In alignment with the goals relating to benchmarks of success and performance accountability measures based on primary indicators of performance, as described in Section 116(b)(2)(A), WSM's Board has determined these priorities while convening a workforce system:

#### 1. To increase strong customer-focused practices with a 70% sustainable employment placement rate.

Through many enhancements within the operations of the Job Centers in Montgomery County and with the implementation of the HIRE (Helping Individuals Reach Employment) program, WSM and its partners have already improved customer access by bringing the services such as workshops and job assistance supports into community libraries and regional centers. WSM has recently relocated the Wheaton Job Center into upgraded and expanded facilities, to support expanded partnerships and training opportunities.

Future strategies include expansion of the HIRE programs to address regional demographics through the expertise and partnership with non-profit partners that are well established within the community. Community partnerships help to build relationships and individualized career navigation opportunities for job-seekers, while promoting stronger employment sustainability.

#### 2. To increase employer engagement and career pathway partnerships in strategic industries.

Strong formalized partnerships with Montgomery College and The Universities at Shady Grove resulted in new pathway programs in coding, healthcare, and entrepreneurship, with plans to add pathways for construction, transportation, auto-technician, and hospitality.

Future strategies include increased work-based learning opportunities and a stronger partnership with MCPS and its career readiness program, including active participation with the Montgomery County Collaboration Board (MCCB), and an increase in hiring events.

#### 3. To enhance current community-based partnerships.

Through regular meetings with the core partners WSM has formalized coordination of services through partnership agreements that result in mutual referrals for supportive services. This helps to address barriers to employment, cross-agency training opportunities, shared processes, and enhanced communication. WSM has also developed partnerships with organizations beyond those housed at the Wheaton Job Center, which has led to broader access to services.

Future strategies include asset mapping, assessing of resources, and identifying gaps of services. The purpose of this is to convene and build the capacity of our current workforce development providers in order to support our employers while also improving service to the most vulnerable.

WDB provides a roadmap for workforce and economic development aimed at creating long-term sustainable economic prosperity in the region and aligning workforce development, economic development and outreach activities around a shared set of objectives. To be successful, strong leadership from community, business and educational organizations is needed to provide their expertise in achieving those objectives. The WDB and partners identified the strengths of the county, challenges and enhancements needed around workforce development topics.

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### STRATEGIC PLANNING TO STRENGTHEN THE LOCAL WORKFORCE SYSTEM

Multiple partners provide a variety of workforce and economic development services to support Montgomery County employers and residents. These services have been developed based on data and regional needs. Services include a broad range of activities which offer Montgomery County's workforce the skills, knowledge, and abilities needed to succeed in a growing and robust economy, while helping to ensure that job seekers are able to earn a family-sustaining income. Employers are utilizing the job centers for recruiting, hiring and retaining a skilled, high-performing workforce. WSM oversees and supports Montgomery County's Workforce Development System and its three (3) American Job Centers (AJC), in addition to a youth center. On average, the system serves over 18,000 individuals and provides over 11,000 services to employers each year. WSM brings together employment and training services designed to work with all people in one place and to make it easier for job seekers and employers to find, access, and use these services.

The comprehensive AJC in Wheaton supports the program operator, the Maryland Department of Labor (MD Labor), and partner staff. Both WSM and MD Labor have staff onsite to serve job seekers and job creators. The Wheaton AJC also hosts local workforce and wrap-around service partners. Job Corps outreach is on-site to provide information about Job Corps locations and review eligibility with youth. The Maryland Division of Rehabilitation Services (DORS) provides workforce services for youth with disabilities and operates the Public Internship Program for individuals with disabilities as well. Jewish Council for the Aging (JCA) is the county's recipient for Senior Community Service and Employment Program (SCSEP) funds. JCA has an off-site location at the Wheaton Job Center to more effectively connect with low-income seniors needing services. The Wheaton AJC, houses key partners in the workforce system: Montgomery College's Title II activities and DORS. WSM and its partners all support strategies to provide quality service at the AJC and affiliate centers.

WSM and its partner service providers are committed to:

- Increasing business satisfaction and trust, through efficient, effective, and accountable workforce services.

- Focusing on development of industry alliances to create substantial impact and outcomes for the targeted industry.
- Developing a deep understanding of the skills gap (i.e., the gulf between the skills job seekers currently have and the skills employers need to fill their open positions) and executing strategies, programs and initiatives to address the gap.
- Serving job seekers who have significant barriers to employment. WSM and its program operators provide the full array of basic, individualized and follow-up services. These services may include, but are not limited to: outreach, staff services, counseling and guidance, assessment, barrier mitigation and support services, job readiness training, labor market information, training, work and learn opportunities, career pathway upskilling, integrated learning strategies, contracts, technology to support service delivery, and any other allowable workforce service that will benefit the job seeking customer and employers in the regional economy. Where available, WSM will fund special projects to support adult priority populations.
- Improving the AJC operations in Montgomery County, to continue to improve services for both employers and job seekers.

The WDB Program Committee is responsible for reviewing and evaluating the performance of the AJC and the One-Stop Operator. The committee reviews and evaluates quarterly reporting for WIOA performance indicators and conducts on-going analyses of programs and outcomes to identify trends and ensure that there is data-led decision making.

### OPPORTUNITIES OF ALL THROUGH STRATEGIC PARTNERSHIPS

Among Montgomery County's talent pool, job seekers can face a wide range of barriers. WSM and the WDB work to effectively train staff on diversity awareness and cultural sensitivity, and continue to explore ways to leverage the wide capabilities of the community in addressing any such barriers through an integrated and customer-centric supportive service system.

The WDB and AJC partners serves as strategic leaders and as community convener of employers, workforce development professionals, education providers, economic development agencies and other stakeholders. Together, they strive to drive innovation,



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catalyze change, align systems, and advocate on behalf of partner investments at the state, regional and local level.

The Board believes that the county is well positioned to have a robust workforce development system that is designed to meet the needs of economic development, business and industry, and the unemployed, by understanding and forecasting the long and short-term skills employers need in a qualified workforce. These skill demands are supported by a delivery system that is positioned to meet a wide variety of needs for a diverse population.

The Board and its Executive Committee set the vision for the workforce system and directs the OSO's activities to align with that vision. Detailed roles and responsibilities are described in Resource Share Agreements (RSA) and in the MOU of required partners.

The focus for the local area in working together to carry out these workforce programs in a coordinated and integrated manner is to enhance access for customers across all the programs and strengthen engagement of all the key partners. WSM is working with partners to align services around customer flow, avoid duplication of services, engage in strategic policy development, share data across systems, engage in continuous improvement, explore collaborative case management, and leverage resources.

Members of the Board are appointed by elected officials and include representation from all core partners and targeted industries. As a group, they developed the following priorities and oversight to carry out the core programs and align resources, and to achieve the strategic vision and goals described in the introduction:

- Provide oversight and strategic development of workforce funds to improve return on investment.
- Support the development of business and industry solutions so county businesses remain competitive by hiring and retaining the talent essential to meet their current and future workforce needs.
- Provide insights into the labor market that help county residents meet their full career potential by having the skills and credentials that meet the needs of local and regional businesses.
- Ensure that the county's residents receive the services they need to start on a career pathway that leads to self-sufficiency.

- Support solutions to address and mitigate the barriers to employment of county residents.
- Oversee the AJC operations to ensure all visitors receive excellent customer service.
- Develop demand-driven workforce development strategies, including sector strategies, to make Montgomery County a leader in demand-driven implementation
- Cultivate the county's workforce development system so that it leads to a positive economic impact on the local and regional economy.

To ensure goals are met, the WDB has created the following committees and associated objectives:

### **WDB Executive Committee:**

- Review performance and perform analysis on a regular basis.
- Create a financially sustainable system.
- Review and analyze labor market information.
- Review and approve policies.
- Establishes and dissolves ad hoc committees as needed.

### **Program Committee:**

- Oversee the AJC operations to ensure all visitors receive excellent customer service.
- Partner with Wagner-Peyser, Adult Education, and Vocational Rehabilitation to ensure implementation/enhancement of a career pathways model.
- Measure customer satisfaction.
- Support staffing trainings and related activities.

### **Business & Community Engagement Committee:**

- Replicate industry sector strategies.
- Define the most significant needs and develop a plan for addressing transportation issues.
- Partner with local agencies and organizations to perform outreach to targeted populations and support them post-hire.
- Develop better onboarding of businesses to the workforce system.
- Create an asset map to identify available resources and pre-existing strengths of the community to address the multitude of needs faced by the targeted populations.

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- Partner with the AJC work group to ascertain best practices to address the population mindset of addressing short term goals vs long-term goals.

### INDUSTRY-LED CAREER PATHWAYS

To ensure quality service to employers and a new Business Solutions approach, consistent and frequent employer outreach and services are currently being provided. This approach is based on best practices and is designed to ensure internal system-wide alignment and external consistency when reaching out to employers. Through the AJC and WDB structures, WSM is engaging employers throughout their business life cycle, promoting strategic growth through career pathways and strong talent development. WDB views its Business Solutions approach as a key part of a comprehensive workforce development system. Strategic partnerships are critical to engage employers in workforce development programs including MD Labor, DORS, the Maryland Department of Commerce, Montgomery County Government, local chambers of commerce, economic development entities, industry associations, community-based organizations, faith-based organizations and an outstanding system of college, university and training entities.

The WDB has successfully facilitated the engagement of businesses by building industry alliances (Industry Partnerships) through facilitated discussions. Listening to alliance representatives and reviewing data, trends and skill gaps that the businesses are experiencing, enables the WDB to properly align program, policies and services and to make changes needed to meet the needs of business in in-demand occupations. Through these alliances, we have developed a keen understanding of the gaps in training programs and program activities that are not meeting business needs which then hinder employment opportunities for the job seekers we serve.

WDB and partners continue to implement a sustainable industry-led talent development model to support industry-led partnerships. Using experience with industry alliances and the EARN Maryland grant as a model, WDB continues to cultivate industry-sector partnerships using the following steps:

- Convene industry-led capacity building groups
  - Determine current and future employment needs
  - Identify required skill sets for each career

- Create training curricula and work/learning experiences
  - Employability skills
  - Technical training
  - Work-learning opportunities (Earn while you learn)
- Industry-led talent development projects
  - Training programs
  - Career awareness campaigns
  - Connection to pipeline—targeted recruitment efforts
  - Career pathway articulation
- Outreach/Recruitment strategies
  - Pipeline Development (Community-Based Organization, MCPS, Higher Education Professional and Business Associations)
  - Incumbent worker training
  - Outreach/recruitment within region for immediate employment demands

In accordance with WIOA, WSM has installed Eckerd Connects as a One Stop Operator selected through a RFP/Procurement process. The contractor has been tasked with completing the following: Conduct quarterly partner forums designed to share best practices being used within partner organizations and to design system-wide processes.

- Improve effectiveness and integration of processes across the system using customer relationship management systems, dashboards, and common databases.
- Improve the customer's experience, through use of virtual one-stop platforms, communication and engagement through social media, and expanded electronic resources.

WSM plans to add new technology solutions in 2021 that will aid in completing the above tasks. Furthermore, the following existing activities will continue to evolve with technological advances:

- Continue and expand current industry-led employability career pathway models.
- Expand work-learning experiences through strategic partnerships.

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In addition to industry alliances, WSM and the WDB support a local workforce development system that meets the needs of businesses in the Local Area through the effective delivery of business services. The WDB, WSM and partners agencies have jointly assembled and support the Business Solution Team (BST). The BST works together by providing a single point of contact for businesses across all workforce system partners. Key elements of the team's work includes the use of a client relationship management system, coordinated business development across sub-contractors and core partners, communication strategies around services offered through the entire system, and collection of business customer satisfaction data.

### COORDINATING ECONOMIC DEVELOPMENT

The WDB is working in partnership with the Montgomery County Economic Development Corporation (MCEDC), Montgomery County Government and community-based organizations (CBOs) in the design and development of activities to better serve youth job seekers and businesses. In partnership with educational partners and adult education providers, WSM has jointly developed new program offerings. WorkSource Montgomery's Executive Director serves on the board of MCEDC. This relationship enables both boards to stay informed, share innovative technologies, new business opportunities, and industry growth and trends. This enables the region to share information on economic forecasting, skill gaps and new learning models.

WSM (and the WDB) and MCEDC are not only co-located, but also jointly promote services that are designed to promote business growth and stability, and to maximize employment and earning opportunities. This unique partnership also gives local youth the chance to participate in internships and job shadowing opportunities.

Working together enables WSM and MCEDC to promote the assets of the region, including but not limited to skilled workforce, educational facilities, housing, transportation and amenities of the region. By jointly focusing on partnerships and business engagement, both organizations are able to be more responsive and supportive of business' needs while promoting employment opportunities for county residents. Outcomes of these partnerships in IT, Healthcare, Hospitality and Financial Services will include:

- Increased business satisfaction and trust, through efficient, effective, and accountable workforce services which met their needs.
- Continuous improvement on educational program offerings.
- Development of a regional forum to identify and promote strategies/programs and initiatives to address the regional skills gap by effectively communicating among engaging partners and employers.
- Enhanced focus on continuous improvement by promoting the American Job Center's operations to make them the 'go to' place for both business and jobseekers resulting in access to employment.
- Promotion of continuous improvement and advances in educational programs that meet current and future needs of employers in order to remain competitive.

A strong workforce system ensures that the business community/employers share real-time talent demands, including the skills and dispositions to be successful within current occupations, as well as the anticipated occupations of the future. WSM and MCEDC each run job-market analyses and share data points that identify and highlight Montgomery County's distinctive attributes and supply-and-demand dynamics. Utilizing these metrics, WSM can provide the business community with the right talent so that in-demand industry sectors can maintain a high level of economic competitiveness and growth.

In addition to providing an analysis of labor market data, WSM has convened targeted industry focus groups. Utilizing their input, WSM has developed industry-focused career maps in the area of health care, information technology, and construction.

Additional career maps for transportation, hospitality, and life sciences occupations are in development. To address critical pipeline development in these and other career pathways, WSM has engaged Montgomery County Public Schools, Montgomery College, and The Universities at Shady Grove in formal collaboration agreements to create and implement innovative talent development projects.

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### INNOVATIONS AND INITIATIVES FOR CULTIVATING INDUSTRY-LED PATHWAYS

To further extend resources and efforts, WSM has been awarded multiple grants for enhancing talent development, through targeted career pathways programs aimed at closing the skills gap and mitigating barriers to employment. These pathway programs target participants that are underrepresented in the industry. Convening and creating opportunity for all necessitates the coordination of public and private-sector policies and programs that provide individuals the opportunity for a sustainable livelihood and supports employers' goal achievement that is consistent with the societal context.

Strategies to enhance innovative initiatives to address employability needs, as defined by the local planning focus group, include:

- Conduct quarterly partner forums designed to share best practices being used within partner organizations and to design system wide processes.
- Increase the use of technology on two fronts
  - 1) To increase the effectiveness of system and process management across partners and;
  - 2) To increase access and effectiveness in customer interfacing processes and services.
- Improve effectiveness and integration of processes across the system, using customer relationship management systems, dashboards and common databases.
- Improve the customer's experience through use of virtual one stop platforms, communication and engagement through social media, and expanded electronic resources.
- Continue and expand current industry-led employability career pathway models.
- Expand work-learning experiences through strategic partnerships.

WSM is also an active participant in the EARN Maryland program, Tech-Hire, Apprenticeship USA, and the Disabilities Employment Initiative grant to cultivate additional opportunities for industry sector strategies. WSM will continue to seek discretionary funding to maintain and expand industry-led initiatives. Below is a listing of current innovations and initiatives:

### CAREER PATHWAYS

#### Cybersecurity

- IBSS provides IT and Cybersecurity services to federal government contractors and created a pipeline training program for people interested in Cybersecurity. Partnering with WSM, interested and qualified candidates can gain real world experience while ensuring that IBSS has the talent they need to adequately serve its clients. Job seekers will gain skills that are valuable worldwide.

#### Health Care

- Nursing Bridge Program—WSM is working with strategic partners to accelerate the training and placement of qualified nurses (BSN). This program increases the talent pipeline by 120 qualified nurses per year. This program is funded through an EARN Grant.

#### Hospitality

- Despite significant job loss due to the COVID pandemic, WSM is committed to supporting the hospitality industry's recovery. WSM is coordinating hiring events as well as working with existing and new partners to develop pre-apprenticeship and/or registered apprenticeship programming to meet the expected demand for labor in Q3 and Q4 of 2021. Along with individual businesses, WSM is coordinating its response with Visit Montgomery, Local 23's STEP program, and the National Restaurant Association's Educational Foundation (NRAEF).

#### IT/Cyber

- Code Partners—In strategic partnership with a consortium of IT companies, WSM offers pathway training and placement in advance coding including Cloud Interface technologies. This program is funded through an EARN Grant
- To meet the significant IT labor needs, WSM is part of regional consortium of Maryland WDBs to deliver IT Helpdesk Administrator training to 250 participants in 2021 and 2022.

#### Construction

- WSM has identified Construction as an industry critical to the economic health of the County and a growing source of family-sustaining careers for residents. WSM has gathered input from industry and public sector leaders and is responding by creating multiple pathways to the industry.

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Current examples include a “Green Building Pre-apprenticeship” in partnership with Montgomery College, Cohort training leading to Registered Apprenticeship with the International Union of Painters and Allied Trades’ Finishing Trades Institute along with the Associated Builders and Contractors. WSM has other industry driven programming in the planning stages to assist in the County’s post COVID economic recovery.

- WSM is working with IUPAT’s Local 51 to recruit for their Glazing pre-apprenticeship cohort slated to begin in Q2 2021 and for subsequent cohorts in 2021 and 2022. Program completers immediately enter IUPAT’s Registered Apprenticeship and are employed with signatory contractors.
- In 2021 WSM is partnering with Montgomery College to deliver a construction pre-apprenticeship with a green building focus.

### Bio-Science

- WSM is teaming with Bio Health Capital on a program to enhance pipeline development by preparing post-doctoral job-seekers for in-demand private sector opportunities, through industry-led bridge training in commercialization practices and private-sector professionalism skills.
- In collaboration with Montgomery College, UMBC at The Universities at Shady Grove, the Montgomery County Economic Advisory Group (EAG), and the Montgomery County Economic Development Corporation (MCEDC), WSM is offering a four-week training program to prepare displaced workers with the skills necessary for jobs in the Biotechnology sector.

### Entrepreneurship

- Launch Montgomery, in partnership with USG, implements a mentor-led, peer-based experiential learning approach designed to discover, equip, and activate the next-generation of entrepreneurs.

### ENHANCEMENT PROGRAMS

- **Summer-RISE** (Real Interesting Summer Experience)—creating strategic partnerships to provide high school students with enriching career development experiences. This program is funded through a Montgomery County Grant.

WorkSource Montgomery (WSM) has built a strong organizational structure that includes a knowledgeable staff and Board of Directors, innovative ways to engage key partners, strong industry-led career pathway programs, active job centers, and diverse resources. While building on our accomplishments, WSM continues to prioritize stronger collaboration and integration of services that go beyond traditional workforce development practices, as outlined in the Workforce Innovation and Opportunity Act (WIOA).

### REGISTERED APPRENTICESHIPS

WSM will utilize non-WIOA funding to facilitate Registered Apprenticeship in Montgomery County, initially focused on the County’s industries of emphasis: BioTech/Life Sciences, Healthcare, Hospitality, IT, and Construction. WSM’s vision for apprenticeships does not end with the target industries, however. Rather, WSM will extend facilitation to other industries depending on need and supporting Labor Market Information. Depending on WSM’s evaluation of the apprenticeship landscape in each industry, they will either facilitate the creation of a Registered Apprenticeship or design an elevated level of support for existing programs. These opportunities will be available to eligible residents; however, a particular emphasis will be placed on increasing opportunity for Opportunity Youth/Young Adults.

### LOCAL FAITH & COMMUNITY-BASED ORGANIZATIONS

WSM is fortunate to be a part of Montgomery County’s robust community of nonprofit and community-based organizations. Building and maintaining relationships with individual stakeholders is a priority for WSM and integral to its success in serving job seekers and employers. Additionally, WSM works closely with Non-Profit Montgomery, an alliance of leaders of nonprofit organizations serving the county by strengthening member organizations, increasing the visibility of their work and advocating on behalf of nonprofits and the people they serve. WSM is also closely aligned with Montgomery Moving Forward (MMF), an initiative of Nonprofit Montgomery, which created MMF in 2013 in recognition of the need to involve multiple stakeholders to address complex community problems.



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### AMERICAN JOB CENTER DELIVERY SYSTEM

#### AREA AMERICAN JOB CENTERS

Employment services specified in the WIOA legislation are available to Adults and Dislocated Workers either directly in the AJC or through core partners. Training services will be provided in partnership with a vast network of public and private training institutions, including the school districts, vocational technical centers, community colleges, private proprietary schools, and four-year public and private educational institutions. The WDB's delivery of employment and training services include, but are not limited to: basic services, individual services, and training services.

As described in AJC Training and Employment Guidance Letter (TEGL) 4-15, WSM's Comprehensive AJC reflects and exemplifies the characteristics of a high-quality AJC. Montgomery County's Workforce Development System is currently undergoing a transformative change. This change requires a paradigm shift in the delivery of workforce services, with a focus on collaboration, alignment of services, and customer-centric strategic design.

Montgomery County has a proud history of utilizing both government and community programs to help employers, unemployed and underemployed citizens. WSM's vision is to convene and facilitate coordination of existing workforce services, and augment service delivery where gaps may occur. By developing a strong, coordinated workforce ecosystem in the county, employers and job seekers will be able to more effectively utilize and leverage the system to grow and maintain a strong economy based on quality talent.

WSM collaborates with core WIOA partners to manage three Job Centers in Montgomery County:

- **Wheaton—Comprehensive Center**

Operator: Eckerd Connects  
Westfield South Office Building  
11002 Veirs Mill Road, First Floor  
Wheaton, MD 20902  
Phone: 301.929.6880  
TTY: 301.962.4083

- **Germantown**

Operator: Eckerd Connects  
Up-County Regional Services Center  
12900 Middlebrook Road, 1st Floor  
Germantown, MD 20874  
Phone: 240.777.2050

- **East County**

Operator: WSM (not WIOA funded)  
3300 Briggs Chaney Road  
Silver Spring, MD 20902  
Phone: 240.777.8412

WSM is committed to reaching out to our career seekers in the communities where they live to ease access and create a stronger customer experience. WSM has finalized a MOU process to provide a "popup" job center called HIRE (Helping Individuals Reach Employment) Programs, which will be located at multiple Libraries and Community Centers. In 2022, WSM will deploy a mobile AJC to provide a presence at community events and institutions in an effort to take services into the community and offer improved access to customers.

#### CUSTOMER FLOW

WSM and its core partners are in the process of redesigning the customer flow in the Montgomery County Job Centers, in tandem with a physical redesign of the comprehensive Montgomery County Job Center in Wheaton. The new focus of the customer flow will be the customers' experience in receiving services, in addition to ensuring all job seekers receive quality access, regardless of skill level, barriers, or demographic background.

As customers walk into the Montgomery County Job Center, a greeter will be available to provide a warm welcome. Front desk staff will be trained to determine whether any customers are veterans. Customers who self-attest to veteran status shall receive priority of service from that point forward. If a customer self-attests to veteran status, staff will complete the MD Labor's Significant Barrier to Employment (SBE) Checklist to determine whether the veteran qualifies as having one or more SBEs.

When the Personalized Needs Assessment is completed, veterans choose from the following options:

1. **If the customer qualifies as SBE, and requires intensive services to overcome a barrier to employment, AJC staff assists in setting up an appointment for him/her to meet with Disabled Veteran Outreach Program (DVOP) Specialist.**
2. **If the customer does not require intensive services, he/she is then referred to Basic Career Services resources, WIOA Title I resources, an AJC Job Service Specialist, or another resource as determined appropriate, based on the Personalized Needs Assessment.**

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The core partners are currently reevaluating the intake and customer flow process and will ensure that the flow has multiple access points. The new intake process will provide different avenues for initial intake that best meets the customers' needs. New customers will be introduced to the services in the center through a customized intake process directed by the customer's needs and desired services. Eckerd Connects is currently working through a redesign of the intake process that could include a PowerPoint/video on the computer, a workshop-style orientation to the center (currently offered), or a customized one-on-one intake.

As part of the intake process, customers will be triaged and channeled into three categories to enhance and customize service options by either WIOA or Wagner-Peyser staff members:

1. **Work Ready—WIOA Basic Career Services through Wagner-Peyser services, which include job search resources, labor market information, access to job service specialists, workshops, job opportunity e-blasts.**
2. **Work Ready, Needs Training—WIOA Training Services through blended service offerings. Services include workshops and occupational training services. WDB will explore expedited service delivery for this category.**
3. **Needs Intensive Supports—WIOA Individualized Career Services through Title I services. Services include skill development (to include both technical and essential workplace skills), career guidance, job readiness skills, and barrier mitigation.**

Individuals who fall into the second or third categories will be connected to a WIOA orientation offered multiple times throughout the week at Montgomery County Job Center locations to access individualized employment and training services.

Eckerd Connects is currently reviewing the best ways to ensure all WIOA partners are included in the customer flow process. Currently, many of the WIOA partners have a physical presence in the comprehensive Montgomery County Job Center in Wheaton. Job Corps has a staff member who conducts outreach out of the center, and MD Labor and the adult subcontractor staff refer to each

other for services. Montgomery College and DORS have a presence in the building—individuals that need additional support for training, adult basic skills, or vocational rehabilitation, are referred to the appropriate entity. Department of Health and Human Services refers Temporary Assistance to Needy Families (TANF) customers that need additional employment or occupational training support to the Montgomery County Job Center.

WSM is committed to ensuring meaningful access to services in the Montgomery County Job Centers and affiliate sites for all customers. WSM will be utilizing technologies such as electronic meeting software and on-line services/trainings to enhance remote services. The Montgomery County Job Centers are expected to meet the needs of job seeker customers by ensuring universal access to their programs and activities for all eligible individuals. Meaningful access includes access to service delivery, resources, and customer support throughout the process. WSM will be exploring strategies and processes for deliberate navigation for customers through key personnel for both the jobseeker customer and the employer customer.

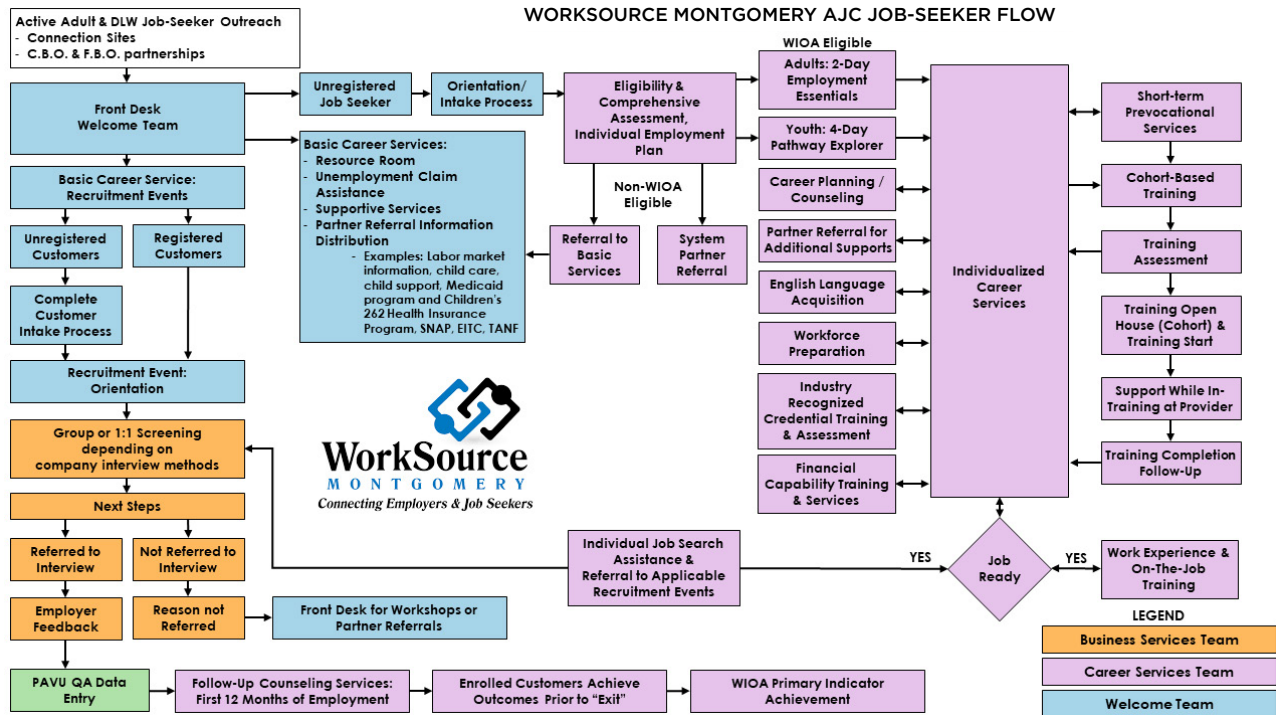
WSM understands that no matter how streamlined the system is, some customers will need additional navigational support. Core partners are currently reviewing how best to help both sets of customers navigate the system. In addition, WSM will continually work with partners to enhance and eliminate gaps in the customer flow and service delivery model that inhibits customers from receiving meaningful access.

### ONE STOP OPERATOR

WSM is committed to following all federal, local and state procurement policies and processes. Contracts are awarded based on pre-established qualifications and scoring protocols.

In Montgomery County, the One Stop Operator is the systems manager. Their responsibility is to ensure that all centers and affiliate sites are configured and operated in collaboration with all the required partners and other potential partners in Montgomery County. As the Montgomery County Job Centers require multiple partners to deliver services on site, effective collaboration is essential. The current OneStop Operator is Eckerd Connects.

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WDB is committed to following all federal, local and state procurement policies and processes. Contracts that are awarded are based on pre-established qualifications and scoring protocols. WSM has engaged a contractor, Eckerd Connects, to fulfill the role of One Stop Operator.

### CONTINUOUS IMPROVEMENT

The WDB has several systems in place to ensure continuous improvement. Eckerd Connects ensures that all facilities, technology, services, employment placement and outreach materials meet all compliance requirements and engage in external monitoring of the Montgomery County Job Centers and services to measure compliance and quality services. In addition, ongoing training in areas such as case management strategies, integrated service delivery models, county assets, and customer service will be explored for entities with a presence in the Montgomery County Job Centers.

WSM and the WDB, through an RFP process, procured two national organizations to provide direct services under the Adult, Dislocated Workers and Youth programs. Both organizations have substantial experience and a strong national reputation for progressive and robust service delivery and conduct their own continuous improvement processes. Additional local providers

augment the services provided by the prime WIOA youth program operator. WSM works with program operators to ensure standardization of key services across program operators, and to encourage best practices and continuous improvement methods.

The WDB is committed to using evidence-based practices and to identifying opportunities to improve all processes, systems and services. WSM utilizes many sources to find nationally recognized practices, including resources provided through the National Association of Workforce Boards and the National Association of Workforce Development Professionals. WDB has proven systems in place to ensure continuous improvement. Within the AJC, the Operator ensures that all facilities, technology, services, employment placement and outreach materials meet all compliance requirements and is an engaging facility. All partners and their staff are provided an AJC Operations Manual that includes all relevant policies, recommended practices, and procedures. This manual was developed by the WDB and approved by Eckerd Connects and by the Board.

The WDB engages in monthly monitoring reviews for compliance to performance goals, customer service survey reviews and customer flow. Additionally, the WDB utilizes an external monitoring support service through an independent subject

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matter experts (SMEs) who have no ties to partner agencies. These SMEs have and will continue to review operations of the AJC. Observations include compliance to policies and rules but also suggestions for improvement of services to support alignment and leveraging of resources.

### ACCESS TO SERVICES

WSM is committed to increasing access to all employers and job seekers, including those in remote areas. Strategies for improvement in this area will include providing signage in a wider range of physical locations in addition to an increased focus on social media announcements about how to access AJC services both for the remainder of the COVID-19 pandemic and beyond. Additionally, WSM will enhance the virtual and remote access to services through the addition of the Career Edge Virtual Service Portal and is developing plans for a new, Mobile AJC in the near future. WSM has also begun utilizing remote meeting technologies such as Zoom and Microsoft Teams to further improve access for those unable to meet in-person and is using the DeliverySlip system for better encryption and security for virtual documents.

### ROLES OF PARTNERS

As codified through agreements, partners commit to coordination and alignment through a focus on systems change to ensure that the customers' (business and job seeker) experience—when interacting with the system—is easy, accessible, transparent, and responsive to their needs.

- **Business Solutions**—The Business Solutions Team will work towards providing a single point of contact for businesses across all workforce system partners. Key elements include a client relationship management system, coordinated business development across sub-contractors and core partners, communication strategies around services offered through the entire system, and collection of business customer satisfaction data. The partners commit to participating in the development of a coordinated business service delivery system.
- **Job Seeker Solutions**—Coordination will be accomplished by focusing on enhancing access for customers across all the programs and strengthening engagement of all the key partners. Partners will address coordination

around customer flow, reduction of duplication of services, strategic policy development, data sharing, continuous improvement, and leveraging of resources. Partners commit to participating in the development of a coordinated referral and intake system, as well as the development of a common customer satisfaction system data collection and analysis system. Additionally, partners commit to promoting information sharing and the coordination of activities across MOU partners to enhance communication and cross-customer engagement.

- **Accessibility for All Customers**—The partners will continuously ensure that all facilities, technology, services, employment placement and outreach materials meet all requirements for access to the Job Centers, including but not limited to, requirements of the Americans with Disabilities Act of 1990 and Title VI of the Civil Rights Act of 1964.

Partners commit to engaging in ongoing Eckerd Connects-led training in areas such as case management strategies, integrated service delivery models, county assets, and customer service.

Eckerd Connects is currently reviewing the best ways to ensure all WIOA partners are included in the customer flow process. Currently, many of the WIOA partners have a physical presence in the comprehensive Montgomery County Job Center in Wheaton. Job Corps has a staff member who conducts outreach out of the center, and MD Labor and the adult sub-contractor staff refer to each other for services. Montgomery College and DORS have a presence in the building—for individuals that need additional support for training, adult basic skills, or vocational rehabilitation, customers are referred to the appropriate entity. Department of Health and Human Services refers TANF customers that need additional employment or occupational training support to the Montgomery County Job Center.

### **Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Workers**

These services target individuals who have either lost their jobs through no fault of their own (Dislocated Workers) or individuals who have been chronically unemployed or underemployed and represent a targeted population (Adults). Through the intake process and using state-of-the-art assessment tools, these populations are segmented and assigned to Career Coaches and/or Population

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Navigators that specialize in working with these populations. Career Coaches/Navigators develop individualized, customized plans for the clients that include activities that align with the client’s career goals; address any potential barriers; identify training that leads to certifications; work and learn activities; job readiness activities; and connecting them with employment opportunities.

**WIOA Youth**

The Board will focus services on out-of-school youth along with serving in-school youth who are not on a post-secondary education path. Using strategies that include career exploration, the Board partners with businesses to host educational events for youth to get a better understanding of the high-growth industries and the high-demand occupations. With better knowledge of the industries, there will be an increase in commitment to establishing a career path in a preferred high-growth industry.

A systemic process for youth to successfully enter a career path that will lead to more family sustaining wages. This systemic approach will be industry-specific and will incorporate mentorship; contextual learning for youth with low literacy skills; access to GED™ instruction and testing; internships and other work and learn activities; job readiness instruction; occupational training leading to industry recognized certification(s); apprenticeship opportunities; and access to employment. In-school youth will focus on career exploration, job readiness and internships (i.e. Summer Jobs).

**Wagner-Peyser**

Board staff meet regularly with Wagner-Peyser staff to discuss client need, new resources in the community, and ongoing education regarding targeted populations. Individuals seeking assistance with updating their resume and connection to employment is the focus of Wagner-Peyser. WSM offers workshops on resume writing, interviewing skills, and other job readiness instruction that all clients can access.

Improved client assessment identifies the need for training and more customized services. Wagner-Peyser staff will have universal checklists that confirm the need to refer the client to WIOA Adult or Dislocated Worker services.

**Adult Education & Family Literacy Act Program**

Montgomery College and the Literacy Council of Montgomery County provide Adult Basic Education and contextualized vocational training and certification programs. MC may also serve as a Title I service provider of occupational trainings and other services. In addition, MC and the Board will develop contextual learning models for individuals with low literacy skills. These models marry math and English instruction with industry-specific training which improves the overall outcome for this client-base.

**Division of Rehabilitation Services (DORS)**

Maryland’s Division of Rehabilitation Services (DORS), part of the Department of Education, provides ongoing training regarding the specific issues and needs of their client-base. The universal intake system ensures that clients are referred to services that meet their specific needs. Working with DORS staff, the Board will ensure that workshops, assessments, and other activities take into consideration the needs of individuals with disabilities (i.e. hearing impaired) to ensure successful universal access. DORS works with the local board to ensure that all training vendors incorporate special needs with respect to instruction to ensure this client-base are able to equally participate in opportunities that lead to employment.

**Temporary Assistance for Needy Families (TANF)**

The Department of Human Services (DHSS) refers individuals on public assistance or foster youth to WorkSource Montgomery for employment assistance. Through both the Temporary Assistance for Needy Families (TANF) and Supplemental Nutrition Assistance Program (SNAP) programs, clients will work with an Intake Specialist to assess job readiness (entry-level versus mid-career), barriers to employment, and other issues specific to this client-base. The Intake Specialist will determine client opportunities that align with other initiatives (i.e. Industry-focused WIOA training). In this case, clients will be co-enrolled and funding will be braided to support the client entering into a career path that leads to a family sustaining wage.

**Trade Adjustment Assistance for Workers Program**

The program provides aid to eligible workers who lose their jobs, or whose hours of work and wages are reduced, as a result of increased imports or production transfers abroad. The Trade Program, which is considered to be part of Maryland’s WIOA System, is a federal program that offers a variety of



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benefits and services to workers whose employment has been adversely impacted by foreign trade. Through a number of benefits and services, the Trade Program provides trade-affected workers with opportunities to obtain the support, resources, skills, and credentials they need to return to the workforce in a good job. These include employment and case management services, training, job search allowances, relocation allowances, reemployment and Alternative/ Reemployment Trade Adjustment Assistance (ATAA/ RTAA) wage subsidies for older workers, and income support in the form of Trade Readjustment Allowances (TRA). The TAA State Merit Staff reviews and makes the final determination on the retraining plan, ensuring it meets the federal requirements under the Trade Act. The Trade Act program is administered, staffed and implemented by MD Labor, local workforce areas, and the Unemployment Insurance Division.

**Jobs for Veterans State Grant Program**

Through collaboration with Veterans Employment and Training Service (VETS), MD Labor administers the Jobs for Veterans State Grant (JSVG) Program, which allows for veterans with significant barriers to employment to receive tailored employment and training services. If veterans require additional skills necessary to obtain employment in the civilian world, they are being referred to Career Center staff and supportive services providers. This process has been smooth in sharing resources, data, and expertise; the Board will continue this strategy. At the same time, the Board will continue improving the mechanisms of engaging Local Veterans Employment Representatives into its work with local businesses.

**Reintegration of Ex-offenders' program.**

To prepare individuals to re-enter the community with hard and soft skills that are in line with the needs of businesses, the Board will provide the following services to the ex-offender population: inmate assessment for job readiness, occupational skills, criminogenic needs and barriers; case management; customized job matching; training opportunities; placement and follow up services.

Although not a recipient of the Re-integration of Ex-Offenders USDOL grant, the WDB has a re-entry program that provides job readiness skills on site for persons who are incarcerated. The program design, staff training, and physical layout of the services are all factors that contribute to the effectiveness of the center. Inmates that are not

eligible to participate while incarcerated, the center has created a monthly “Welcome Home” session that explains available services and refers them to the AJC.

The center has a 20-week curriculum that customers work through and receive a certificate of completion for each module. Staff are also located weekly in the Wheaton Job Center to support ex-offenders after release. This allows for seamless merging of ex-offenders into the pool of non-offender job seekers engaged at the community-based centers. Employers who hire ex-offenders may be eligible for the Federal Bonding Program.

Employers are briefed on the Federal Bonding Program. Career navigation services start the development of IEPs so that an individual is aware of the services offerings and resources available to them upon release to help them succeed. They are provided access to services to assist them in resume and interview preparation, and other community services available to them. Transitional job opportunities will be made available to them to develop work history and experiences.

**Carl D. Perkins Career and Technical Education Act**

The Carl D. Perkins Career and Technical Education Act provides funding for career and technical education at the secondary and post-secondary levels. The Montgomery County Public School (MCPS) Superintendent and the Montgomery Community College (MC) President were both appointed by the County Executive to serve as a member of the Board. Both entities as well as the Universities at Shady Grove work closely with the Board to analyze data, identify employment opportunities in growth industry sectors, and design programs to align secondary and post-secondary training opportunities in high demand industries.

**Montgomery County Economic Development Corporation (MCEDC)**

MCEDC supports business and serves as a catalyst for business growth in Montgomery County thereby increasing job opportunities, expanding the tax base and improving quality of life. WorkSource Montgomery and MCEDC co-locate and mutually serve on each board.

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**Jewish Council for the Aging (JCA)**

The Jewish Council for the Aging is committed to making it possible for low-income and other disadvantaged older adults to participate fully in determining their own future and the future of their communities. The JCA runs the Senior Community Service Employment Program (SCSEP), which is the largest federally-funded program specifically targeted to older adults seeking employment and training assistance.

**Job Corps**

Job Corps is a no-cost education and vocational training program administered by the U.S. Department of Labor that helps young adults ages 16 through 24 improve the quality of their lives through vocational and academic training. The program provides job readiness for youth to enable them to find gainful employment.

**The Montgomery County Community Action Agency**

The Montgomery County Community Action Agency (CAA) provides services to empower, educate, coordinate and assist qualified people,

including families, youth, children, the disabled and seniors in reducing poverty and building a better life for themselves. CAA seeks to reduce poverty and increase self-sufficiency among County residents through services, partnerships, and advocacy, and as part of the Department of Health & Human Services (DHHS) Office of Community Affairs, advances the implementation of equitable and inclusive health and human service systems. Key programs include: Head Start (grant oversight and monitoring); The Takoma East Silver Spring (TESS) Community Action Center, VITA (Volunteer Income Tax Assistance and EITC outreach), and Contract monitoring. The Community Action Board provides governance, shares data regarding poverty, and advises policymakers.

**The Montgomery County Department of Housing**

The Montgomery County Department of Housing is dedicated to strengthening communities and improving the lives of Montgomery County citizens focusing on the ownership, management, sustainability and preservation of affordable housing. The Commission provides supportive services to clients of the workforce development system.

**ROLES AND RESPONSIBILITIES**

Partner	Role
WorkSource Montgomery Inc (WSM)	Adult, Dislocated Workers, Youth services
Maryland Department of Labor	Wagner-Peyser, Trade Adjustment Assistance, Jobs for Veterans State Grants, Unemployment Insurance
Maryland Department of Rehabilitation Services	Vocational Rehabilitation
Jewish Council for the Aging	The Senior Community Service Employment Program (SCEP)
Montgomery County Public Schools	K-12, Technical education at the secondary level, National External Diploma, Carl Perkins program
Montgomery College	Carl Perkins program; Adult Education and Literacy activities; training provider; Career and technical education programs at the post-secondary level
JobCorps	Job readiness services for youth
Montgomery County Community Action Agency	Community Service Block Grant, employment and training activities
Montgomery County Department of Housing	HUD development and training activities
Montgomery County Department of Human Services	Temporary Assistance for Needy Families (TANF)
Local Management Board	Outreach and supportive services
Community-based organizations	Outreach and supportive services
Faith-based organizations	Outreach and supportive services
Montgomery County Economic Development Corp.	Business Engagement

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**INDIVIDUAL TRAINING ACCOUNTS**

Currently, the ITA development and approval process is guided by the following guidelines: WIOA Sec. 134(c)(3)(G)(iii) states that “[t]raining services provided under this paragraph shall be directly linked to an in-demand industry sector or occupation in the local area or the planning region.” As such, the Board limits individual training to those industries and occupations that the Local Workforce Development Board deems in-demand. Those industries and occupations are identified on the documentation that clients receive at intake.

The WDB has a strategy defined in the ITA policy which is available for review in the Job Center Operational Manual. ITA’s will be available to eligible individuals subject to the availability of funds to support priority occupations (in-demand jobs) identified by industry. These trainings are available in cohort trainings through Montgomery College which have been deemed cost effective and provide the greatest success for employment opportunities. The Board has set a spending cap on all ITA’s of \$3,500.00 This cap is reviewed on an annual basis. In all cases, the Board seeks to provide high-value training solutions utilizing the eligible training provider list (ETP) for all individual and cohort training in the most in-demand and popular occupations and industries in the local area.

**PRIORITY OF SERVICE**

The WDB will ensure that participants in the WIOA Adult program meets the federal, state, and local priority of service guidelines, and as such, that the targeted Adult populations can access the WIOA system on a priority basis. The WDB has developed an eligibility policy to reflect the state’s priority of service guidance (posted on the WSM website).

The Maryland Department of Labor has identified the following targeted populations under WIOA Adult funding: The Maryland Department of Labor (MD Labor) has identified the following targeted populations under WIOA Adult funding:

**Maryland Priority of Service Populations**

Target Populations: Individuals with Barriers to Employment

- Displaced Homemakers
- Eligible migrant and seasonal farmworkers
- Ex-offenders

- Homeless individuals
- Individuals facing substantial cultural barriers
- Individuals with disabilities, including youth with disabilities
- Individuals within two years of exhausting lifetime eligibility under Part A of the Social Security Act<sup>10</sup>
- Individuals who are English language learners
- Individuals who are unemployed, including the long-term unemployed
- Individuals who have low levels of literacy
- Individuals without a High School Diploma
- Low income individuals (including TANF and SNAP recipients)
- Native Americans, Alaskan Natives, and Native Hawaiians
- Older individuals
- Single parents (including single pregnant women and non-custodial parents)
- Veterans
- Youth who are in or have aged out of the foster care system

The local board may add additional populations due to changes in economy or county conditions based on local demographic data and a vote by the WDB. Priority to targeted populations will be given in the following order for services under WIOA Adult funding:

**MARYLAND PRIORITY OF SERVICE POPULATIONS**

Priority	Population Group
1st	Veterans and eligible spouses who are also low-income, recipients of public assistance and/or basic skills deficient
2nd	Individuals who are not veterans or eligible spouses who are included in the groups given priority for WIOA adult formula funds
3rd	Veterans and eligible spouses who are not included in WIOA’s priority groups
4th	Any other populations identified by the Governor or Local Board for priority
5th	Individuals who are not veterans or eligible spouses who are outside the groups given priority under WIOA

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Priority of service status is established at the time of eligibility determination and does not change during the period of participation. For the purposes of program eligibility, priority of service will be implemented through priority of intake. Out of a group of individuals who have applied for WIOA enrollment, individuals who are eligible for first priority must be served and processed first, followed by individuals who are eligible for second priority, and so forth. In addition, targeted programs and initiatives operated through WIOA Adult funding will be focused on priority populations where feasible.

Program operators are encouraged to identify barriers of customers for local performance measure determination. Any barriers documented for priority of service purposes must be verified through allowable documentation outlined in local policy. Participant files must show indication of priority status on the outside of the file. Priority of service implementation will be tracked by WSM and program operators.

### INCUMBENT WORKER TRAINING

In the fast and rapidly changing world of talent development, WSM is committed to incumbent worker training. Based on industry demand and career pathway development, incumbent worker training will be enhanced to include stackable credentialing, enhanced cohort training service delivery and additional case management.

The following factors will be considered when determining the eligibility of employers to receive the WIOA share of funds to provide training to incumbent workers using either Adult and/or Dislocated Worker formula funds:

- The characteristics of the incumbent workers to be trained and how they would benefit from retention or advancement.
- The quality of training. Whenever possible, the training should allow the participant to gain industry-recognized training experience and/or lead to industry-recognized credentials and/or an increase in wages
- The occupation(s) for which incumbent worker training is being provided should be in demand, aligned with the WDB's targeted industries or small businesses.

- The employer has not laid off any workers within 120 days to relocate to Montgomery County.

The WDB will follow federal and state regulations for the employer share of the training costs.

### SERVICE PROVIDER TRAINING

Excellence in Service is a core WSM principle, and as such, provision of quality customer service in the Montgomery County Job Centers and county workforce initiatives is a priority. To ensure quality customer service that meets WIOA compliance, WSM will provide staff development opportunities to address key principles of customer service, ensure appropriate certifications and skills of staff, and evaluate customer satisfaction for continuous improvement. WIOA vendors also provide internal customer service training as well. A Job Center Director is on staff and coordinates and tracks staff training for all employees to ensure customer-focused practices. The WDB will work with all vendors and partners to coordinate staff training efforts across entities to align strategies, knowledge bases, and customer service delivery.

<sup>10</sup> This refers to the TANF program. Each State defines lifetime eligibility for TANF. In Maryland, individuals can receive TANF benefits for up to five years. If individuals reach year four and five of receipt of TANF benefits, these individuals become a targeted population according to WIOA, irrespective of the fact that after year five, individuals may continue to receive TANF benefits due to hardship.

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**TITLE I—ADULT, YOUTH, AND DISLOCATED WORKER FUNCTIONS**

**ADULT & DISLOCATED WORKER EMPLOYMENT AND TRAINING SERVICES**

For the past several years, WSM chose to sub-contract Title 1 services with mixed results. After an internal evaluation of WSM performance and combined with feedback from stakeholders and policymakers, WSM is preparing to be the direct service provider for Adult and Dislocated Worker services. WSM is in the process of building, equipping and deploying a highly trained staff to serve Montgomery County. Included in these plans is the creation of a robust Business Services Team, Career Advisor Team and Trainers. WSM is also investing in experienced supervisory staff to ensure seamless continuation of services for current customers and the increased traffic as the COVID recovery begins to take hold. Lastly, WSM is investing in needed infrastructure and software improvements to ensure our staff have state of the industry tools to effectively complete the WSM mission.

In accordance with section 188 or WIOA and the ADA, Montgomery County’s Job Centers are required to provide reasonable accommodation for individuals with disabilities to ensure equal access and opportunity. Staff must use the same processes for all customers, including individuals with disabilities. The AJC Director or Program Director will ensure reasonable modifications in practices and procedures, when the modifications are necessary to avoid discrimination based on disability. WSM takes responsibility for ensuring the Job Centers meet accessibility requirements, and MD Labor will support accessibility compliance at the Wheaton Job Center seriously. DORS will provide technical assistance around accessibility and accommodations.

All Adult and Dislocated Worker services are designed to start, advance, or transition county residents on a pathway to employment in high-growth middle and high skill occupations in in-demand industries.

**PARTNER RESPONSIBILITIES**

Activities	Partner
Eligibility of Services	Core Partners**
Outreach, intake, orientation	Core Partners
Initial assessment	Core Partners
Labor Exchange services	MD Labor
Referrals to programs	Core Partners
Labor market information	WSM, MD Labor, EDC
Supportive services information	Core Partners
Unemployment Insurance information & assistance	MD Labor
Financial Aid information	Core Partners
Comprehensive assessment	Core Partners
Individual employment plan	WSM, DORS
Career planning, counseling	WSM, DORS
Short-term prevocational services	WSM, DORS
Work experience	WSM, DORS, DSS
Out-of-area job search	MD Labor, DORS
Financial literacy services	WSM, CBOs, FBOs
English language acquisition	Adult Education Providers*, CBOs
Workforce preparation	Core Partners, HSS
Occupational skills training	Training Providers, DORS
Work and Learn	WSM, DORS
Programs that combine workplace training with related instruction	WSM, DORS, Training Providers
Training programs operated by private sector	WSM
Skill upgrading and retraining	Training Providers, DORS
Entrepreneurial training	WSM, Training Providers
Customized training	WSM, Training Providers, DORS
Incumbent worker training	WSM, EDC, MD Labor, Training Providers
Adult education and literacy activities	Adult Education Providers, DORS
Job readiness training	Core Partners

\* Adult Education Providers—Montgomery College and Montgomery Public School System

\*\* Core Partners—Department of Labor, Licensing and Regulation; Division of Rehabilitation Services; WorkSource Montgomery; Montgomery College.



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The Board directs the planning and execution of a premier comprehensive workforce system whereby both customers and clients are able to seamlessly access workforce-related resources and support through multiple entry points within the county. The system is easy to use, and provides exceptional service delivery, ultimately meeting the customers' and clients' needs.

The system offers multiple entry points that include:

- **Community Access Points—HIRE Programs**  
Working closely with targeted communities in the county, the workforce system provides career-related information and resources for residents that are in closer proximity to these resources than to the Career Centers. The Board ensures that these Community Access Points are located in areas with higher rates of unemployment and poverty. Career Access Points include East County, Rockville and Silver Spring. In these locations, satellite programs are established within these respective residential areas and are staffed by workforce specialists who provide resume writing and interviewing assistance; referrals; access to computers for job search; connection to hiring events; and access to Career Center workshops.
- **Community Partners**  
Community Partners play a critical role in the community. Partners are able to provide services unique to a client's personal circumstances (i.e. mental health issues; substance abuse; GED tutoring; access to public assistance; housing). A referral process is under development to ensure that clients experience a seamless transfer from one partner to another with minimal duplication of registration, eligibility, and documentation requirements.
- **Targeted Outreach**  
Utilizing outreach tools, such as social media, community newspapers and online websites, local radio, and email campaigns, clients are informed about Career Center intake services, basic career services, intensive career services, and job training services. Other announcements include workshops, business presentations, and hiring events. Individuals mandated by Unemployment Insurance (UI) receive communication inviting them to attend job-readiness workshops in the Career Center, in an effort to connect them to employment opportunities as quickly as possible.

As customers walk into the Montgomery County Job Center, a greeter is available to provide a warm welcome. New customers will be introduced to the services in the center through a customized intake process directed by the customer's needs and desired services. The core partners are currently reevaluating the intake and customer flow process and will ensure that the flow has multiple access points. The new intake process will provide different avenues for initial intake that best meets the customers' needs. We provide an array of business services such as: targeted recruiting events, candidate screening, incumbent worker training, and anticipatory pipeline development to ensure that the right talent is available as the industry demands grow and change.

As part of the integrated intake process, customers are triaged and guided into three categories to enhance and customize service options:

1. **Work Ready, Needs Training**—WIOA Training Services through blended service offerings through an integrated approach with partners and CBO services. Services include workshops and occupational training services. WSM strives for expedited service delivery for this category.
2. **Needs Intensive Supports**—WIOA Individualized Career Services through Title I services. Services include skill development (to include both technical and essential workplace skills), career guidance, job readiness skills, and barrier mitigation.

Individuals who fall into the second or third categories will be connected to WIOA individualized employment and training services.

WSM is committed to ensuring meaningful access to services in the Montgomery County American Job Center and affiliate sites for all customers. The Montgomery County AJC is expected to meet the needs of their job seeker customers by ensuring universal access to their programs and activities for all eligible individuals. Meaningful access includes access to service delivery, resources, and customer support throughout the process. WSM utilizes strategies and processes for deliberate navigation for customers through key and highly trained personnel for both the jobseeker customer and the business customer.

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WSM understands that no matter how streamlined the system is, some customers will need additional navigation support. Core partners are currently reviewing how best to help both sets of customers navigate the system. In addition, WSM continually works with partners to enhance and eliminate gaps in the customer flow and service delivery model that inhibits customers from receiving meaningful access.

### **Basic Services**

Many clients are seeking immediate assistance with employment attainment. These clients will be referred to Wagner-Peyser staff that will assist with resume review and writing, job search, and interview preparation. Through an interview process, the staff will assess the career-readiness level of clients to determine the need for additional training or to equip clients with in-demand skills that can lead to industry-recognized credentials. Wagner-Peyser includes business-facing staff that will work with clients seeking immediate employment opportunities and will successfully connect them to employment.

Wagner-Peyser staff will serve as the front-line, working with clients who access the services of the Career Center. Improving services to individuals with disabilities and veterans is a priority. In particular, Wagner-Peyser staff will assess every new veteran and every returning veteran requiring intensive services to determine whether or not they have any significant barriers to employment. If they meet one of the SBE categories they are given a choice to continue to receive services from a Wagner-Peyser staff person or be referred to a Disabled Veteran Outreach Personnel staff person to be case managed. Those veterans without SBE's are serviced strictly through Wagner-Peyser staff. Through intense training on understanding this community, the Career Center staff will better serve this population including determining, through assessments, if a client should be immediately referred to the Division of Rehabilitation Services or other service providers.

Clients requiring additional training are referred to Title I staff. Wagner-Peyser staff will meet in person with Title I staff to ensure there is a smooth transition, and minimize duplication of information and eligibility issues. In the future, this process will be automated using an electronic referral process. A Standard Operating Procedure (SOP) will be put in place to ensure that the referral process is effective and tracks outcomes.

Cross-agency trainings will be conducted to provide staff of various entry points/locations necessary skills and knowledge so the same array of basic services could be provided in those locations, which would create meaningful access for all clients.

### **Individualized Services**

Clients that are referred to Title I services will work with intake staff that will utilize career exploration, Basic Skills Assessments, Job Readiness and Employment Matching assessment tools to determine suitability and eligibility, and identify any barriers to training and/or employment (i.e. transportation, childcare, etc.). The Intake Specialist will be knowledgeable about all of the workforce system resources available in the community to address these challenges. Upon completing these assessments, clients will be referred to individualized services. In particular, veterans would be referred to specialized services designed to help this population segment.

Clients referred to individualized services will work with a Career Coach that will utilize industry-recognized career assessment to determine a client's specific career level (i.e. entry-level; midcareer; advanced career). This tool allows the Career Coach to customize a plan that may include career exploration, occupational training that leads to an industry-recognized credential, training in essential workplace skills, and other job readiness activities.

### **Supportive Services**

Some clients who access the Career Center will have barriers that may make it difficult for them to become successful in pursuing employment. In Montgomery County, the primary barriers to employment include access to transportation and reliable childcare. Through strong partnerships and innovative strategies, Career Center staff will have access to funding to address these challenges on a short-term basis until such time the client is stabilized through employment and is able to fund these barrier solutions independently.

### **Essential Workplace and Job-readiness Instruction**

Businesses have indicated that the top challenge they face with their talent include the basic workplace attributes that exemplify a model employee, such as timeliness, team approach, professional attire, and working in a multi-generational environment. Clients will participate in essential workplace skills instruction to ensure they have the attributes that businesses demand. In addition, clients will participate in job readiness instruction including resume writing and interviewing skills.

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### **Occupational Training**

Training will be primarily focused on high-growth industries and will be provided through either classroom training or through individual training accounts. Businesses will be integrally involved in curriculum review and development, and meeting in advance with training participants to determine their experience and cultural “fit.” This process will ensure that all training will increase the chance of immediate employment upon certification attainment.

### **Work and Learn**

Clients will be assessed to determine if “hands-on” work experience working directly with a business may be required to prepare them to enter the workforce. This experience is beneficial to both the client as well as the business by “testing out” the applicant, and helps to provide some work experience within the industry and occupation. In addition, for those businesses that require additional “customized” training within the context of their business needs, clients may receive On-the-Job-Training (OJT) contracts that secure employment post training. These contracts are short-term and is a shared expense between the business and Workforce Innovation and Opportunity Act (WIOA).

### **Job Development and Employment**

To assist with identifying and preparing for employment opportunities, clients will be assigned to a Talent Acquisition Specialist, who works directly with employers that are seeking qualified talent. In the event that a client’s post-assessment of job readiness training needs does not require occupational training, they will be assigned to a Talent Acquisition Specialist responsible for identifying employment opportunities. The Talent Acquisition Specialist is a member of the Business Services Team and is knowledgeable about local market information along with those employers who are actively seeking talent. The Talent Acquisition Specialist will work with the client to customize their resume and prepare them for the interview process.

### **Follow Up**

Career Coaches will periodically contact the businesses they are working with to assess the success of the clients served and to ensure they continue to be employed with the business. WIOA requires 12 months of follow-up to ensure retention. During this critical time, Career Coaches will confer with the client to ensure employment success and to address any concerns or challenges the client may be facing in the workplace. This partnership between the business and WIOA ensures the client’s success charting their benchmarks and securing their employment.

### **Businesses are our Customers**

The Board recognizes the need to provide exceptional services to businesses seeking skilled and qualified talent. To remain relevant to the business community, Career Center services must be tailored to meet their needs. The Business Services Team will serve businesses through the American Job Center by: 1) orchestrating the Maryland Workforce Exchange registration process; 2) providing guidance in posting job announcements in the Maryland Workforce Exchange; 2) Assisting in identifying qualified candidates represented in the Maryland Workforce Exchange; 3) Providing businesses with needed industry-related labor market information and assisting clients with data acquisition; 4) Hosting hiring events that unite pre-screened, qualified clients to businesses with job openings; 5) Encouraging businesses to take advantage of On-the-Job-Training subsidies, consider a Registered Apprenticeship, MD Business Works funding for incumbent worker training and WOTC tax credits; and 6) Assisting in upskilling the existing workforce through development and implementation of incumbent worker training. Business Services also provides meeting or training space to employers and community-based organizations for workforce related activities at no cost.

As a connector, Business Services assists employer customers with relationship building – introductions to needed partners, government entities and other organizations that can provide expertise and assistance whether starting a business, growing a business, keeping a business in compliance with county and state regulations, or providing human capital and employment law advice.

WorkSource Montgomery uses a consultative approach as the primary method to deliver services to Montgomery County Local Workforce Development Area businesses. This approach prioritizes relationships and open dialogue to identify and provide solutions to the needs of a business customer. By focusing on the customer, rather than the product being “sold,” which is customarily talent recruitment/development services, WSM can gain an understanding for the larger context in which the employer is operating. This technique helps workforce development service providers identify with and understand the challenges faced by their business clients so they can position their solutions in a more compelling and effective way. Better comprehension also enables the service provider to address business needs with the right tools and resources. In this way, business clients come to rely on WorkSource Montgomery as a trusted business advisor and connector to services throughout the county, and even the state.

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Business Services enjoys promoting the successes of our business clients whether by posting and sharing news and success stories on social media or highlighting work examples in presentations to job seekers or other audiences. Employers are invited to speak on panels and provide their opinions regarding workforce related topics to other businesses and individuals.

**RAPID RESPONSE SERVICES**

Rapid Response activities are coordinated efforts that include the employer, affected workers, WSM, MD Labor Dislocation Services Unit, and AJC partners. WDB will work with employers and employee representative(s) to reduce the disruptions on businesses, affected workers, and communities that are associated by job loss. The WDB is committed to working with both Worker Adjustment and Retraining Notification (WARN) and non-WARN businesses and employees to maximize resources in times of job loss.

The Rapid Response Team will provide customized services onsite at an affected company, accommodate work schedules, and assist companies and workers through the challenging transitions associated with job loss. The WDB will work with the Rapid Response Team to conduct an initial business consultation, deliver an information session for affected employees, and customize additional solutions as appropriate under the Dislocation Services Unit’s direction.

The WDB will work with Rapid Response representatives to ensure that individuals affected by layoffs and business closures have knowledge and access to all services available. The WDB will ensure that all partners are available to provide outreach services, as needed, to aid. As required, extended hours of operation and onsite outreach activities will be supported. On-site registration service can be provided and linkage to other community resources will be provided.

**YOUNG ADULT SERVICES**

To better implement the State’s Youth Policy and WIOA sections 129(a)(1)B)9111)9VII) and (a)(1)(c) (iv)(vii), the Young Adult Opportunity Program is designed to help young adults and youth become more self-sufficient and contributing members of society. The youth program has a strong community outreach emphasis and partners with multiple organizations to leverage opportunities across the county to serve all eligible youth. The WDB has a

standing youth committee. The committee includes member(s) of the Local Board, a member of which chairs the committee, members of community-based organizations with a demonstrated record of success in serving eligible youth, and other individuals with appropriate expertise and experience who are not members of the Local Board. The committee brings its expertise to help address the employment, training, education, human and supportive service needs of eligible youth, including out-of-school youth and youth with disabilities.

WSM demonstrates its commitment to In School Youth with a number of investments and partnerships. Montgomery County Public Schools is a prominent partner and stakeholder. Our leadership regularly coordinates with MCPS to promote quality programming available from both organizations. Examples of the partnership include our support of the MCPS Summer RISE program by contributing stipend funding and hosting regular information sessions regarding apprenticeship opportunities available to students. Additionally, WSM uses separate MD Labor funding to deliver Summer Youth Programming targeting In School Youth.

The Board recognizes the need to prepare the emerging workforce for starting on a career path and acquiring the necessary education, skills, credentials and experience. To facilitate the process and help youth find their career path, the Board will incorporate 14 elements of the Youth program to include:

- 1. Tutoring, skills training, and dropout prevention;**
- 2. Alternative secondary school services;**
- 3. Paid and unpaid work experiences;**
- 4. Occupational skills training;**
- 5. Leadership development opportunities;**
- 6. Supportive services;**
- 7. Adult Mentoring;**
- 8. Follow-up services;**
- 9. Comprehensive Guidance and Counseling;**
- 10. Concurrent education and workforce preparation activities;**
- 11. Financial literacy education;**
- 12. Entrepreneurial skills training;**
- 13. Labor Market Information (LMI);**
- 14. Preparing for Post-Secondary Education and training.**

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For that, the Board will support a model that includes career exploration, essential skills training, occupational trainings that lead to credentials, and work experience opportunities. The WDB has instituted a five-step process for serving young adults which includes individualized assessment, sector-based job training in leading industries, young adult apprenticeship and work-based learning opportunities, placement, and follow-up services. Upon completion of the assessment, young adult staff will develop an Individual Service Strategy with each young adult that will map out anticipated progress through the program and will include employment goals, objectives and milestones, and appropriate services. Staff will focus on career pathways as part of their career guidance. The Individual Service Strategy will be reviewed every 90 days, per federal guidance.

**Out-of-School Youth Services** include but are not limited to:

- Objective and comprehensive assessment services
- Career exploration and guidance
- Academic support and tutoring
- Obtaining a diploma or GED preparation and testing
- Post-secondary education and vocational training
- Job referrals and employment
- Work readiness and work maturity skills training
- Internship/work experience activities, including summer youth connection programs
- Military information
- Support services
- Referrals to adult Montgomery County Job Center locations
- Mentoring and leadership development
- Job Corps information/referrals

The WDB will ensure that sub-contractors conduct assessments of each participant to include academic level, skill level, and service need. The assessment, per federal guidance, will include review of basic skills, occupational skills, prior work experience, employability, interests (including non-traditional occupations), aptitudes, supportive service needs, and developmental needs.

Following assessment, young adult staff will develop an Individual Service Strategy with each young adult that will map out anticipated progress through the program and will include employment goals, objectives and milestones, and appropriate services. Staff will focus on career pathways as part of their career guidance. The Individual Service Strategy will

be reviewed every 90 days per federal guidance.

WSM and the WDB are currently structuring an effective operation and delivery of youth programs and services through the following:

- Providing objective assessments that focus on academic and occupational skill levels, as well as service needs and career pathways.
- Partnering with K-12 and other stakeholders to reduce dropout rates for in-school young adults.
- Prioritizing services to older and out of school young adults, specifically disconnected young adults.
- Re-engaging disconnected young adults through strategic partnerships with highest need secondary schools and postsecondary institutions.
- Increasing the number of young adults that attain postsecondary degrees/credentials with a priority on high growth industry sectors as defined by the local labor market information.
- Partnering with employers, education and other partners to connect young adults to work-based learning opportunities.
- Co-locating youth programs in Montgomery County Job Centers to strategically align and target young adult services and resources to populations of highest need and to facilitate co-enrollment when appropriate.
- Utilizing technology to increase access and services.
- Partnering with local disability-serving agencies and providers as well as health and mental health providers.

Procedures are implemented to target and provide workforce services to young adults with the following barriers:

**Foster Care/Aging Out of Foster Care Youth:** The foster care young adult population service delivery focuses on career guidance, assistance with social service referrals (mental health/medical), tutoring and academic supports, employability skills/life skills training, job referrals, leadership development skills, support services, and mentoring activities.

**Justice-involved Youth:** The primary services to justice-involved young adults focus on work readiness and work maturity skills training, comprehensive career counseling, assistance attaining employment, liaison with court system, collaboration with organizations that target justice-involved young adults, development of strong partnerships to fill gaps in existing interventions, and mentoring activities.



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**Youth with Disabilities:** Services for young adults with disabilities focus on collaboration and linkages with community partners' services for young adults with disabilities, customized work readiness skills, customized internships/ work experience, and supportive services.

**Basic Skills Deficient:** Services for young adults who are academic or English basic skills deficient focus on usage of standardized tests to determine basic skill levels, pre-testing and post-testing, tutoring, developmental activities to include individual or group academic activities, and specialized instructions to include integrated learning models.

Existing youth services will be enhanced to include industry sector strategies; this employer-centered approach will give young adults unique and direct access to private sector employer opportunities in the WDB's four targeted growth industries of construction, information technology, healthcare, and hospitality. With enhanced young adults' services around industry sectors, employers will be able to access a wider pool of qualified out of school and offer work-based learning opportunities.

### SECONDARY AND POST-SECONDARY EDUCATION COORDINATION

The WDB has entered into formal partnerships with both Montgomery County Public Schools (MCPS) and Montgomery College (MC) to identify other areas of activity and service coordination with secondary and postsecondary education programs in the county that lead to local in-demand jobs. WDB works with its partners to implement recognized post-secondary credentials across programs that are desired and endorsed by employers and aligned to career pathways.

Strategies include:

- Using the Eligible Training Provider List (ETPL) of vetted providers.
- Selecting training providers that meet employer requirements for skill attainment, certification or degrees.
- Providing career planning services through the Montgomery County Job Centers and ensuring the planning includes a review of post-secondary education options.
- Augmenting occupational training with work-based learning initiatives, such as OJTs, work experiences, and apprenticeships.

The goal is that a young adult who goes through the system will have access, when applicable, to obtaining:

- A High School Diploma equivalency.
- A clear pathway, provided by trained career specialists depending on customer interests and labor market information about demand occupations, to access post-secondary credit and non-credit programs that result in industry-recognized certifications of the technical skill requirements of the occupation.
- Increased opportunity for stackable certifications and credentials.
- Opportunities for work-readiness training
- Connection to practical, hands-on skill training.

The Board policy requires that at least 20% of the Youth funds are used for work-based training activities. Updates to the Board on relevant expenditures occur at every full Board meeting. The program director and Executive Director will keep budgetary track of the percentage to ensure that the requirement is met.

The Board recognizes the importance of focusing on serving out-of-school youth. Therefore, 80% of WIOA Youth funds have been set to serve this population segment.

Outreach efforts will be conducted throughout the county that include participation and hosting of community youth events. The use of digital outreach strategies (i.e. social media, texting) should help to increase the number of youth that are reached. Partners such as the public school system, community and faith-based organizations will also be leveraged as a way to reach harder to serve youth. In addition to these methods, the Board will support creation of opportunities for Design Thinking that allow youth to vocalize their needs and help create programs that will support them.

Innovative measurements, such as Career Scope and other career assessment tools, will be utilized to help out-of-school youth identify their strengths and career trajectories. Assessment outcomes will help youth and Career Coaches to develop career pathways and an array of services. The services will include: career exploration, mentorship programs, work and learn opportunities, and participation in industry academies. Partners will address coordination around customer flow, reduction of duplication of services, strategic policy development, data sharing, continuous improvement, and leveraging of resources. Partners commit to participating in the development of a coordinated referral and intake system, as well as the development of a common customer satisfaction system data collection and analysis

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system. Additionally, partners commit to promoting information sharing, the coordination of activities, and the enhancement communication and cross-customer engagement.

### **TRANSPORTATION AND SUPPORTIVE SERVICES**

Supportive services are defined as those services or activities (provided either directly to or on behalf of customers) necessary to reduce or eliminate barriers to obtaining or retaining employment. The WDB permits the provision of supportive services for several populations to assist with the elimination or reduction of barriers that may hinder compliance with training, work activity requirements, and employment opportunities. The WDB will provide support services that are consistent with all applicable federal, state, and local laws and regulations.

Common barriers to employment, employment training, and other required activities typically include lack of transportation, lack of available child care and, in extreme cases, lack of a proper home. To address these issues, the Montgomery County Job Centers have informal partnerships with the public transportation system and various other non-profit organizations. Through these partnerships, the centers can obtain bus passes each month that are distributed to clients to assist with transportation issues. Eligible clients are also able to receive child care vouchers that can be used to pay for daycare services and in those cases of extreme hardship. These informal processes are in the process of becoming formalized through the development of a master list of partnering agencies and center staff members receiving regular training on the informal referral process.

The WDB and the partners are currently developing a strategy to reach out to more organizations that provide these services, in order to develop formal partnerships and the creation of an asset map. A key area of need is mental health services. Currently, a family services agency is located at the one-stop to provide some mental health counseling to customers who may be depressed or have other non-psychotic needs. More such services are needed, along with transportation and housing. A plan is in development to also provide training on trauma informed care to case managers at the centers.

### **ADULT PRIORITY GROUPS FUNDING**

Through its strong partnerships with community-based organizations, training organizations, and the Adult and Dislocated worker service provider, WSM is well-positioned to provide a variety of employment and training related activities to all adult priority groups as indicated in the state plan and in support of Montgomery County initiatives. Program operators will ensure that individuals receiving intensive WIOA services meet eligibility requirements for adult and dislocated workers as outlined in local policies.

WSM and its program operators will also utilize WIOA adult funding to support employer engagement on behalf of the WIOA system, to include but not be limited to job fairs and job-matching efforts, industry specific recruitments, industry sector strategies, industry-led projects, retention, incumbent and other employer training, assessments, roundtables, and any other allowable WIOA activities to further support employer needs.

For job seeker services, WSM and its program operators may use funding to provide the full array of basic, individualized and follow-up services. These services may include, but are not limited to: outreach, staff services, counseling and guidance, assessment, barrier mitigation and support services, job readiness training, labor market information, training, work and learn opportunities, career pathway upskilling, integrated learning strategies, contracts, technology to support service delivery, and any other allowable workforce service that will benefit the job seeking customer and employers in the regional economy. Where available, WSM will fund special projects to support adult priority populations.

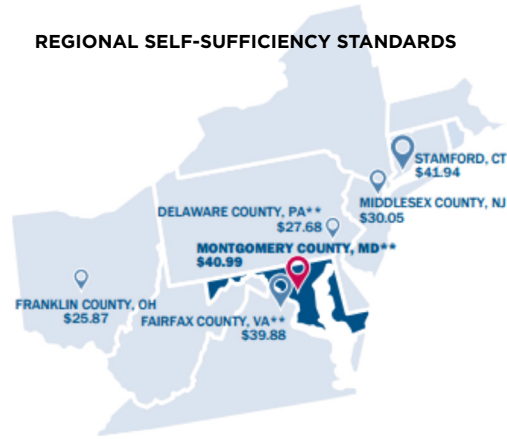
### **DISLOCATED WORKER FUNDING**

WSM and its program operators will utilize WIOA funding for dislocated workers, to support the reemployment of dislocated workers through a dual employer-job seeker approach. WSM and its program operators will fund employer engagement on behalf of the WIOA system, to include but not be limited to job fairs and job matching, industry specific recruitments, industry sector strategies, industry-led projects, retention, incumbent and other employer training, assessments, roundtables, and any other allowable WIOA activities to further support employer needs. In addition, Dislocated Worker funding will be used to support rapid response activities in the area.

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For job seekers, WIOA Dislocated Worker Funding will be focused on helping job seekers retool and retrain to prepare for new careers. These services may include, but are not limited to: outreach, staff services, counseling and guidance, assessment, support services, labor market information, training, work and learn opportunities, career pathway upskilling, contracts, technology to support service delivery, and any other allowable workforce service that will benefit the job seeking customer and employers in the regional economy.

REGIONAL SELF-SUFFICIENCY STANDARDS



SELF-SUFFICIENCY

The WSM policy requires all programs receiving WIOA funding for Adult, Dislocated Worker or Youth programs will use either the Poverty Income Guidelines or the 70% Lower Level Standard Income Level (LLSIL)—whichever is higher of the two—to determine if applicants qualify as “low income” for those programs that require it.

Montgomery County has the highest self-sufficiency rate in the state of Maryland with the self-sufficiency standard for one adult and one preschooler at \$71,755 or \$40.99 per hour to meet the families’ basic needs. While Montgomery County has a higher minimum wage than Maryland, at \$10.75 an hour, a parent with one preschooler would need to work 128 hours per week to meet the self-sufficiency standard. Montgomery County’s self-sufficiency standard is one of the highest in the region. Self-sufficiency will be equivalent to the wages identified in the following table.

POVERTY GUIDELINES, JANUARY 2021		LLSIL—70% BY FAMILY SIZE, 2021	
Size of Family	Poverty	Size of Family	Poverty
1	\$12,880	1	\$12,274
2	\$17,420	2	\$20,114
3	\$21,960	3	\$27,609
4	\$26,500	4	\$34,079
5	\$31,040	5	\$40,221
6	\$35,580	6	\$47,038
7	\$40,120	If 7+, add	\$6,817
8	\$44,660		
if 8+, add for each	\$4,450		

Addressing the definition of self-sufficiency guides WSM’s internal performance measurements, therefore the WDB is currently revising the current self-sufficiency policy from WIA to expand and augment the definition. It is anticipated this new policy will be adopted and implemented in October 2022. The Montgomery County Community Action Agency, which focuses on reducing poverty and increasing self-sufficiency in the county utilizes the Self-Sufficiency Standard (SSS), developed for the Maryland Community Action Partnership by the Center for Women’s Welfare at the University of Washington. The SSS is a budget-based measure of the cost of living that defines how much families must make to meet basic needs without public or private assistance.

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SELF-SUFFICIENCY STANDARDS FOR MONTGOMERY COUNTY

	Adult	Adult Preschooler	Adult Infant Preschooler	Adult Preschooler School-Age	Adult School-Age Teenager	2 Adults Infants	2 Adults Infant Preschooler	2 Adults Preschooler School-Age
<b>Monthly Cost</b>								
Housing	\$1,511	\$1,748	\$1,748	\$1,748	\$1,748	\$1,748	\$1,748	\$1,748
Child Care	\$0	\$1,279	\$2,773	\$1,929	\$650	\$1,494	\$2,773	\$1,929
Feed	\$294	\$445	\$584	\$672	\$779	\$713	\$839	\$923
Transportation	\$180	\$180	\$180	\$180	\$180	\$360	\$360	\$360
Health Care	\$179	\$521	\$535	\$541	\$566	\$579	\$590	\$597
Miscellaneous	\$216	\$417	\$582	\$507	\$392	\$489	\$631	\$556
Taxes	\$770	\$1,522	\$2,474	\$1,903	\$1,160	\$1,623	\$2,152	\$1,758
Earned Income Tax Credit (-)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Child Care Tax Credit (-)	\$0	(\$50)	(\$100)	(\$100)	(\$100)	(\$50)	(\$100)	(\$100)
Child Tax Credit (-)	\$0	(\$83)	(\$167)	(\$167)	(\$167)	(\$83)	(\$167)	(\$167)
<b>Self-Sufficiency Wage</b>								
Hourly	\$17.90	\$33.98	\$48.92	\$40.99	\$29.60	\$19.53/adult	\$25.08/adult	\$21.60/adult
Monthly	\$3,151	\$5,980	\$8,610	\$7,215	\$5,210	\$6,874	\$8,827	\$7,604
Annually	\$37,807	\$71,755	\$103,322	\$86,580	\$62,518	\$82,489	\$105,925	\$91,252
Emergency Savings Fund (Monthly)	\$62	\$295	\$491	\$402	\$227	\$77	\$174	\$112

For Dislocated Workers, the Local Board will consider self-sufficiency as 80% of the pre-layoff family income. A participant making less than 80% of the pre-layoff family income will be considered as an underemployed Dislocated Worker.

**UNLIKELY TO RETURN TO OCCUPATION**

For dislocated workers unlikely to return to previous industry or occupation is considered when the dislocated worker is laid off and meets at least one (1) of the requirements below:

- Number of opportunities in previous industry/occupation is declining based on labor market information;
- Supply of candidates in previous industry/occupation exceeds the number of opportunities in the county;
- Projected annual employment increase for industry or occupation is less than 100 jobs;
- The individual has engaged in an unsuccessful job search in their previous industry/occupation for over three months;

- Individual can no longer meet the minimum requirements for positions available in their occupation;
- Wage variable for positions no longer matches with individual's level of skills and experience; and/or Individual is unable to perform the duties of the previous industry/occupation due to age, ability, illness/injury, disability, or other barriers.

The WDB supports the above criteria to define “unlikely to return to work.” Determination by AJC staff that an individual’s likelihood of returning to his/her previous industry or occupation is unlikely due to circumstances that cause significant barriers to employment.

**ELIGIBILITY CRITERIA FOR YOUTH REQUIRING ADDITIONAL ASSISTANCE**

The need for additional education, vocational training, and/or intensive career counseling will be determined on a participant-by-participant basis and will be based on the following criteria:

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- Limited/non-existent employment skills or social skills
- No significant work history, poor work history, an inability to retain jobs as evidenced by being fired from a job within the previous six months or two jobs within the previous twelve months
- Residence in a high crime and/or high poverty area based on zip code or census tract
- Residence in a single-parent household with a disabled parent
- Involvement with the justice system

### NEED FOR TRAINING (ITA/COHORT)

A need for training is a collaborative decision made with input from the individual and the Career Specialist. Past activities, experience and education level, job readiness level, and the Individual Employment Plan determine the need for training per individual. The WDB, in collaboration with its partners, has developed a “need for training” document. The Comprehensive Adult Student Assessment System (CASAS) is used to assess customer skill level, interests and aptitude and must be administered to anyone pursuing WIOA occupational training. Those who proctor the assessment must go through a rigorous training. If one has at least a Bachelor’s degree (60 credit hours) with at least a 2.5 GPA, or an Associate degree, s/he does not need to necessarily take CASAS. The assessment must be taken for those with only a high school diploma, GED or less. The outcome of the assessment must also be in line with the requirements of the industry of interest. Of course, one’s experience is also taken into consideration. If the person has prior training experience in a particular vocation, yet did not score adequately on the assessment, they may still be able to pursue additional training to make themselves more marketable. WSM and the WDB are also exploring other assessment tools, such as FuturePlan and Skill Deck.

Career Services Specialists instruct customers in conducting labor market and occupational research. The specialists make sure customers have some knowledge of the occupation and what it entails prior to pursuing training in that field. As part of the intake process, staff is aware that an assessment is required as part of the IEP and any ITAs and cohort training.

Other basic and intensive services include:

- Assist the client with the development of an Individual Employment Plan (IEP) and job readiness support which addresses potential barriers to employment and how to overcome them.
- Provide pre and post-employment placement coaching, and update IEP as required.
- Coordinate with other agencies and community-based organizations to assist clients and make appropriate referrals.
- Network with community resources to provide services that address specific barriers customers face in accomplishing their employment goals.
- Consult with other staff to promote customer goals and career-related needs.
- Follow-up with customers who are not attending programs and provide intensive support to ensure compliance with training and employment.
- Contact customers about career opportunities as well as job fairs on an ongoing basis.
- Attend community events that can be beneficial for our customers’ career pathways as well as assist with addressing additional barriers that could hinder customers from gaining subsidized employment opportunities.

### FOLLOW-UP SERVICES

Currently, the WDB utilizes guidelines and rules established by legislature and the State to inform the organization’s policy on follow up services. The minimum requirement of 12-month follow-up will be included in the policy. Programmatically, WDM reviews the intake and enrollment processes, display of federal signs, case files, accessibility for all customers, and programmatic specific compliance for WIOA, Priority of Services, training services data input in the states system of record. From a fiscal standpoint, the WDB ensures subcontractors follow all procedures as indicated in federal, state, and local policies and WIOA regulations and ensure costs are allowable. Expenditures are tracked monthly to assure correct cost categories and that expenses are within contracted cost limitations. Frequent desk reviews are conducted on each WIOA contract.



SECTION VI

**TITLE II-ADULT EDUCATION & FAMILY LITERACY FUNCTIONS**

**INTEGRATING & ALIGNING TITLE II SERVICES**

As described in AJC Training and Employment Guidance Letter (TEGL) 4-15, WSM’s Comprehensive AJC reflects and exemplifies the characteristics of a high-quality AJC. Montgomery County’s Workforce Development System is currently undergoing a transformative change. This change requires a paradigm shift in the delivery of workforce services, with a focus on collaboration, alignment of services, and customer-centric strategic design.

Montgomery County has a proud history of utilizing both government and community programs to help employers, unemployed and underemployed citizens. WSM’s vision is to convene and facilitate coordination of existing workforce services, and augment service delivery where gaps may occur. By developing a strong, coordinated workforce ecosystem in the county, employers and job seekers will be able to more effectively utilize and leverage the system to grow and maintain a strong economy based on quality talent.

Current practices and procedures are under review in collaboration between the WSM Board and partners the Literacy Council of Montgomery County (LCMC) and Montgomery Coalition for Adult English Literacy (MCAEL) in developing and implementing a full compliance process for reviewing local applications. Until this process is complete, the policies put in place by the previous board and leadership of WSM will remain in place. The target completion date is Q3 of 2022.

The WDB has a formal agreement and informal partnerships with both Title II funded programs at Montgomery College and LCMC, the current provider of Adult Education and Literacy programs. The Adult Education programs at Montgomery College and the Literacy Council provide the English language skills, adult basic education, and GED preparation that adults need to further their education at the post-secondary level, obtain employment, play positive roles in the education of their children, and become involved community members.

Montgomery College has the highest volume of adult education participants in the state of Maryland. The program is student-centered, with classes designed to maximize student access through excellence in teaching, individualized student success plans, access to technology, and flexibility of locations and schedules. Staff emphasizes bringing the “classroom

into the community and community into the classroom,” to increase relevancy in learning.

LCMC’s Integrated English Language and Civics Education/Integrated Education Training (known as IELCE/IET) has been designed to prepare adults who are English Language Learners to place such learners in unsubsidized employment for in-demand industries and occupations that lead to economic, self-sufficiency and integration within the local workforce development system.

The Integrated English Language and Civics Education (IELCE) part of the program integrates English literacy and civics education activities to help English language learners achieve competence in English through contextualized instruction on the rights and responsibilities of citizenship.

LCMC’s IELCE classes are offered throughout the year to meet the demand. The classes meet twice or three times of the week depending on the schedule. Every student who participates in this class takes a pre-and post-test for tracking student outcomes.

For the Integrated Education Training (IET) part of LCMC’s rigorous, and innovative IELCE/IET program, learners participate in adult education and literacy activities while additionally participating in workforce preparation activities, workforce training, and a specific in-demand job training that leads to certification that could help learners qualify for entry-level employment or advancement. Not all certification programs are approved for IET.

LCMC’s IT Fundamentals training is an approved certification training for LCMC to approve this program to learners under the LABOR grant. Currently, LCMC has ONE group of learners who are single-women and mothers who are looking to be certified and to get advancement in their jobs. The level of the students participating in this IET program is High-Intermediate and Advanced since IT Fundamentals certification has complex terminology, and it may not be suitable for lower-level learners.

In FY 22, LCMC will expand in its offerings of IET program as regards to the content, and groups. Starting in the Fall 2021, LCMC will offer Microsoft Office as a Bridge Program for Beginner-level students to create a pathway for these students to learn required terminology and have them ready for the Advanced IT Fundamentals Certification Program.

Additionally, it is LCMC’s plan to hire content specialists in IT and Adult Education teachers to teach the Bridge and IT Fundamentals Classes as co-teachers for

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better instructional practices, where students may get focused language instruction with the Adult Educator while they will be getting content-specific training with the IT instructor.

In addition to classes, LCMC provides the largest tutoring program in the county, with over 600 volunteers. The Literacy Council’s tutoring programs are volunteer based, and work with low level non-native English speakers as well as with native English speakers who read and write at a basic level. Over 1,700 students, and 85 nationalities are served annually. With Montgomery College leading the effort, The Literacy Council also provides additional services and programs for adult learners, including testing for the Maryland I-Pathways program, the online learning program for GED® test preparation, and workplace literacy classes for local companies.

Montgomery County has a significantly higher need for English language skills than for adult basic education. Within Montgomery College’s Title II funded programs, 81% of students were enrolled in English language classes and over 60% of Adult Basic Skills participants were co-enrolled in English language classes. In general, Montgomery College’s English language learners tend to be more educated. Of those who went to school outside of the U.S., 49% of students completed 13 years of education or above. In addition, many English language learners are employed in some capacity.

However, not all English language learners are accessing language services. In total, of the 130,000 individuals that speak English less than very well, only 13,000-15,000 (or 10%) attend English language learning courses through Montgomery Coalition for Adult English Literacy’s (MCAEL) network of providers (which includes Title II funded programs). MCAEL shows that 11% of Spanish limited-English speakers are being served through their network, but only 2% of speakers of Asian and Pacific languages are accessing services. These adult education demographics create a unique landscape for potential collaboration in Montgomery County. The WDB is committed to working with Title II grantees and core American Job Center partners, in addition to a rich local ESOL delivery system, to create a viable delivery system that is inclusive of the Adult Basic Skills learner and addresses their needs effectively.

WSM, Montgomery College, and LCMC are working together to provide better coordination of services between Title I and Title II services. Coordination efforts will occur around the following opportunities:

- Cross-staff Training—A key first step in improved coordination is assuring that staff of all three entities understand each other’s programs and processes. This will occur as part of Eckerd Connects’ efforts to improve understanding of each partner.
- Stronger Referral Processes—WSM, the Title I subcontractors, and the Title II providers will devise better referral processes to ensure customers gain the best access to services. This could include presentations to each other’s customer base, formal referral processes, and increased co-enrollment.
- English for the Workplace—The partners are committed to ensuring English language learners gain the English skills that are necessary for the workplace and connected to targeted industry needs. WSM will work with the Literacy Council to explore contextualized opportunities. WSM will promote and support workplace literacy instruction, where feasible, and market workplace literacy to employers. WSM will also consider the use of incumbent worker training funds to support workplace adult education activities as part of industry strategies.

To align assessments, the WDB has encouraged the use of CASAS for its providers, in order to ensure that a common standardized assessment for basic academic skills is being used to facilitate accurate information sharing and to match what Title II providers are using for assessments. Montgomery College provides English for the workplace, contextualized vocational ESOL, and career training for ESOL adult learners. WSM’s contracted WIOA service providers have agreed through their scope of services to consistently administer the CASAS. WSM recognizes that Adult Education and some workforce partners may also administer the TABE or other National Reporting System (NRS) assessments that are approved by Federal regulations and state guidance for reading and math skills, as well as English skills. To ensure comprehensive and consistent assessments, the specific assessments and standards will be identified in policies with Title II partners’ input in Montgomery County. Partners will administer the CASAS and other National Reporting System (NRS) approved assessments that are approved by Federal regulations, state guidance, and WDB preference to participants in need of English language proficiency.

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Montgomery County workforce development and adult education providers recognize the requirement to comply with testing protocols and data quality procedures as outlined in the state assessment policy. Title II Adult Education partners will work with WSM to implement consistent assessment training procedures for test administrators. Workforce development and adult education providers will coordinate testing services. Each entity will conduct assessments for their respective populations and additional partnership conversations will explore further coordination of testing to reduce duplication of services and enhance service delivery across entities.

As with other partner programs detailed earlier in this plan, monthly coordination meetings with all partners revisit how each of the program services are delivered to ensure there is no duplication of services.

WSM and partners will address coordination around customer flow, reduction of duplication of services, strategic policy development, data sharing, continuous improvement, and leveraging of resources. Partners commit to participating in the development of a coordinated referral and intake system, as well as the development of a common customer satisfaction system data collection and analysis system. Additionally, partners commit to promoting information sharing and the coordination of activities across MOU all partners to enhance communication and cross-customer engagement.

The Adult Education and Family Literacy Act provides funding for a variety of services to help adults develop basic skills, such as reading, writing, math, and English language learning resulting in the transition to post-secondary education/training and gainful employment. Services include:

- ABE - Adult Basic Education
- GED Classes - General Educational Development
- GED Ready - Official Practice Test
- NEDP Site - National External Diploma Program
- GED Test Center - Official GED Testing Site
- ESL - English as a Second Language
- EL Civics - English Language Civics/Citizenship
- Family Literacy

As convener, WSM is responsible for ensuring that all Title II partners, along with all other partners, are fully compliant and that test administrators are fully training in accordance with MD Labor's policy and applicable testing guidelines as set forth by the application test publisher. All Title II partners are subject to these terms per agreement with WSM.

### **COORDINATED ASSESSMENT DELIVERY**

WSM, Montgomery College, the Literacy Council of Montgomery County, and other community providers are committed to developing an appropriate referral process for shared customers and individuals interested in pursuing services from the core partners. Title I and Title II representatives will work together to develop a referral process. The partners will ensure that any referral process protects the rights and privacy of individuals as outlined in the Federal Education Rights and Privacy Act (FERPA).

Furthermore, all Montgomery County WIB members and staff, partners, WorkSource Montgomery AJC Centers and affiliate centers, or WIB staff volunteers, interns, community service workers, and partner staff operating in a One-Stop Center, inclusive of all Resource Contractors and sub-recipients staff members, are required to complete and sign the Montgomery County WIB One-Stop Center Confidentiality Agreement which specifies that the individual is aware of the priority the WIB places on confidentiality and the right to privacy that a customer should expect as outlined within Board policy 2012-03.

The President of Montgomery College and the Executive Director of the Literacy Council of Montgomery County both sit on the WDB to represent both local Title II providers in the county. Staff members of both Montgomery College and the Literacy Council participate in all OSO and WSM monthly partnership meetings to coordinate partner services throughout the workforce ecosystem. In addition, the WSM Executive Director and the President of Montgomery College have scheduled meetings across topics, including Title II service delivery. Through board discussions, WSM will support Title II activities in the county and ensure Title II interests are met as part of the workforce delivery system. These collaboration activities will be documented through meeting notes.

The WDB and the Title II partners are currently exploring how to bring adult education services on site within the Montgomery County Job Centers and have outlined virtual and onsite services from Title II providers in the MOU. The WDB is exploring obtaining additional space to create a dedicated education and training lab. Dedicated resources will be explored among the partners regarding the development of the MOU and RSA. The WDB is committed to creating job centers that are welcoming and supportive of the needs of the English language learner through cultural sensitivity, multilingual

## SECTION VI

staffing and outreach to trusted community-based organizations. Revision and expansion of services could include expanded hours to meet the scheduling needs of adult education learners, review of technology needs for individuals with low computer literacy skills, and better promotion of services targeted to English language learners. Implementation oversight is conducted through Eckerd Connects (as the operator) and tracked through customer feedback surveys.

WSM and the local Title II programs will also work together to connect workforce development activities for adult learning customers, such as integrated learning. Finally, staff training modules around cultural sensitivity will include cultural competency and language access considerations.

## SECTION VII

### TITLE III—WAGNER-PEYSER FUNCTIONS

#### MAXIMIZING COORDINATION OF SERVICES

Wagner-Peyser is a labor exchange program that brings together individuals who are seeking employment and employers who are seeking employees. MD Labor administers a labor exchange that has the capacity to assist job seekers to find employment; to assist employers in filling jobs; and to facilitate the match between job seekers and employers. Self-services are available to all job seekers and employers at the center or remotely. In addition to accessing information electronically, customers can choose to receive information in more traditional forms such as printed materials, which are available at Montgomery County Job Centers.

Montgomery County Job Center staff (both WIOA and Wagner-Peyser staff) provide services to the employer community, as well as to job seekers. Multiple employer services include assistance with screening qualified applicants, assessing/testing applicants, and assistance with application processing. These activities can be conducted at the employer's location or at the center. Specialized services to employers include on-site visits, employed worker training, federal bonding services, tax incentives, mass recruitments, and job fairs.

At the comprehensive Montgomery County Job Center, WIOA staff work side-by-side with Wagner-Peyser staff, particularly in the center's resource area. Eckerd Connects is currently working to develop a clear delineation of roles and responsibilities to provide for the elimination of duplication of service and promote easier access for all job seekers.

Every UI claimant that comes to the center is invited to attend an orientation on all the workforce services to which they have access. Working in a fully co-located facility allows Wagner-Peyser, WIOA, and partner staff to develop processes and workflows to identify and promote workforce services to UI claimants using an integrated approach.

Wagner-Peyser staff provide Reemployment Services and Eligibility Assessment (RESEA) and Reemployment Opportunity Workshop (ROW) seminars in the Montgomery County Job Centers,

per regulation. Staff will be trained by the state on correct information and services they can provide to UI claimants and will be trained on how to support individuals applying for a claim.

Montgomery County Job Center partners will develop an intake and referral process for individuals attending RESEA and ROW seminars to effectively connect them to other Montgomery County Job Center and WIOA offerings. The instructor works with WSM staff to ensure promotion of WIOA service offerings and begins basic eligibility review for WIOA services.

#### MIGRANT & SEASONAL FARM WORKERS

There are currently no identified migrant or seasonal farm workers in Montgomery County. However, anecdotal evidence collected by MD Labor suggests that Maryland's agricultural employers are challenged by the scarcity of workers interested in the agricultural field. Historically family-owned farms often struggle to remain in business or resort to hiring via the H2A Program.

If Montgomery County farms hire migrant and seasonal farm workers, the WDB will ensure that such workers receive the same employment services where they live and work that non-migrant seasonal farm workers receive at the Montgomery County Job Centers. MD Labor and WSM staff would work together to conduct outreach to migrant and seasonal farm workers, and would connect with the state's National Farm Workers Jobs Program recipient, currently Telamon Corporation, and the State Monitor Advocate to gain technical assistance in providing relevant services.

Montgomery County staff would ensure any outreach or services would include a bilingual component. In addition, WSM would work with agricultural employers to ensure support for their migrant and seasonal farm workers. When serving MSFWs, MD Labor will conduct any and all housing inspections.



SECTION VIII

**TITLE IV—VOCATIONAL REHABILITATION FUNCTIONS**

The Maryland State Department of Education/ Division of Rehabilitation Services, in accordance with 29 U.S.C. 721(a) (11) will provide the following services to individuals with disabilities:

- Provide comprehensive assessments and an Individualized Employment Plan;
- Provide guidance and counseling, physical restoration, and training to financially eligible persons with disabilities;
- Provide follow-up services to enhance job retention;
- Provide other services as may be available and appropriate;
- Provide Pre-Employment Transitioning Services for students with disabilities, as defined by WIOA;
- Provide Supported Employment Services for youth with disabilities as defined by WIOA;
- Provide independent living services older blind services to enhance the capacity of persons with disabilities to live unaided in the community;
- Provide performance information as required by WIOA;
- Provide crossing training to AJC workforce staff on disability related issues;
- Provide training and technical assistance on disability related issues and on assistive technology;
- Engage employers through the Division's Business Liaisons;
- Work in a collaborative manner to coordinate services among the Workforce Partners for individuals with disabilities.

WDB has a strategic partnership with the Division of Rehabilitation Services (DORS) and has defined roles and functions in the MOU and RSAB. DORS provides information and assistance to AJC partners and placing individuals with disabilities, including individuals with significant disabilities, blind and low vision, hearing and sensory impaired and emotionally fragile job seekers in employment. There is assistive technology, located at each center, which is tested on a regular basis to ensure proper accessibility.

WDB is a subgrantee to MD Labor on its Disability Employment Initiative (DEI) grant through the Department of Labor and is developing a Cohesive

Resource Committee (CRC) with representatives from core Job Center partners, workforce providers, MD Labor, DORS, Adult Basic Education providers, Behavioral Health Administration (BHA), Maryland Department of Disabilities (MDOD), and the Development Disabilities Administration (DDA), to more effectively support the workforce needs of individuals with disabilities. This team is facilitated by a Disability Resource Coordinator. Through the DEI grant, WDB and partner operators engage in cross-agency training, expanding the capacity of the AJC to more effectively serve individuals with disabilities, and to conduct outreach to businesses. In addition, WDB will become a Ticket to Work site, to further support individuals receiving Supplemental Security Income (SSI) or Social Security Disability Insurance (SSDI).

The WDB is committed to ensuring that a comprehensive system of talent development services are available to individuals with disabilities by:

- Working with the Vocational Rehabilitation and DEI program partners with expertise in serving individuals with disabilities, to seek advice on improving service access and service delivery in AJC and all workforce programs.
- Utilizing technical assistance through the DEI grant and local partners to ensure all Americans with Disabilities Act (ADA) assistive technology and software is up-to-date and meeting the needs of customers with disabilities.
- Developing an Employer Network for the Social Security Administration's Ticket to Work program, in order to provide increased opportunities to engage the disabled population with a plan for self-sufficiency.
- Improving employment outcomes for individuals with barriers to employment through subcontracts to community organizations that specialize in employment and placement services to individuals with disabilities.
- Complying with USDOL's WIOA Section 188 Nondiscrimination and Equal Opportunity Regulations by training program staff in its requirements and conducting continuous compliance monitoring.

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The partners are committed to providing services to individuals with disabilities through the AJC and larger workforce system. To promote continuous improvement, the WDB and partners are committed to:

- Making each center and affiliate site more welcoming to individuals with disabilities through training all staff who work in the centers.
- Ensuring that reasonable accommodations are always provided at on-site orientations, training programs, recruitments, etc.
- Conducting a regular and ongoing program of disability awareness for all staff within the system.
- Creating more education and training programs and pathways to employment for a wider range of learners along a spectrum.

DORS serves individuals with disabilities who are both eligible to receive services and meet the Division's Order of Selection criteria through referrals from other partners or self-directed. Collaboration plans include working together for joint planning efforts, leveraging funding streams, and incorporating greater integration with employers through a job development network.

DORS provides disability awareness and sensitivity training for staff, and will work with the WDB on sharing DORS eligibility results and providing a warm referral for individuals deemed Category II (Significant Disabilities) and Category III (Non-Severe Disabilities) to WDB contracted staff.

SECTION IX

TEMPORARY ASSISTANCE FOR NEEDY FAMILIES FUNCTIONS

TANF INTEGRATION IN THE AJC SYSTEM

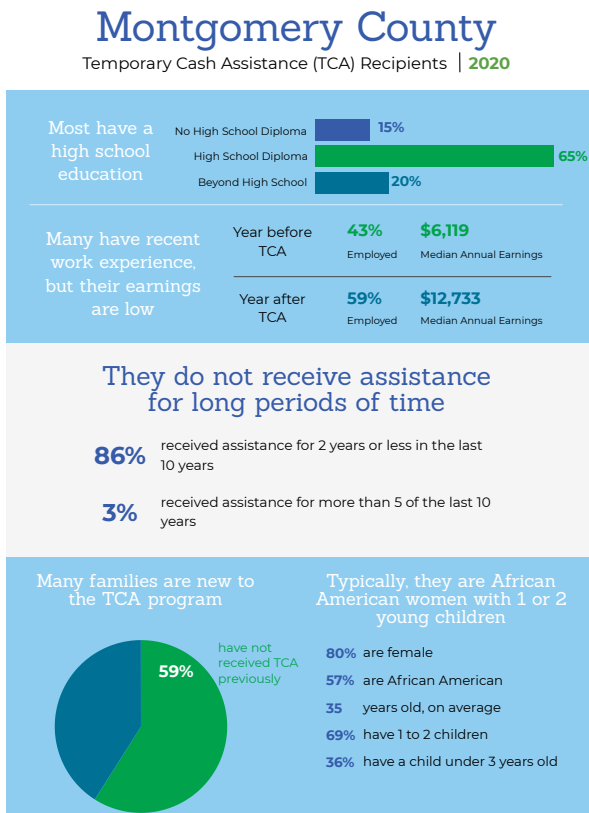
TANF providers are a mandated partner in the America Job Center system under WIOA. In Montgomery County, TANF (also known as Temporary Cash Assistance) has been a longstanding Montgomery County Job Center partner. Staff members work to ensure that public assistance recipients are enrolled in programs and are receiving services they need. The TANF staff is integrated in the One-Stop to provide information on services and assists with screening customers for benefits. TANF participants have access to a broad range of AJC services that include partner services, career counseling, occupational skills training opportunities and job placement services.

As referenced throughout this Plan, the WIOA partners including TANF agreed to a common intake that includes an informal assessment and orientation session, Maryland Workforce Exchange registration and referral to career services. In addition, TANF staff participates in orientation/information sessions, coordination meetings to facilitate co-enrollments, career pathway strategies, supportive services, and staff development training. WIOA provides an opportunity to enhance this partnership and explore additional coordination of services to better serve individuals receiving TANF.

WSM and the board continued to work needs to be done to ensure a referral system among all the partners that includes a ‘warm hand-off’ of customers from one agency to another. The One Stop Operator, Eckerd Connections continues to engage in a conversation about how to further develop a common referral and screening system. WSM and the County’s Department of Health and Human Services (HHS) envision a seamless, integrated customer flow facilitated through a dedicated technical platform that would reduce duplicative data entry. The partners will ensure that this seamless system is based on a two-generation poverty strategy—integrating referrals to Head Start, Early Childhood Services and the Child Care Scholarship program.

The partners are committed to creating an integrated system that addresses:

- Customer Intake—The TANF workforce sub-contractor through Health and Human Services has been and continues to be included in partner discussions to develop a common customer flow that will be aligned across WIOA partners.
- Referrals—All WIOA workforce partners will have access to a full mapping of workforce services and WSM will facilitate a comprehensive training and understanding of referrals across partners.
- Service Coordination—Once shared customers are identified, there will be ongoing understanding of case management capacity and coordination of shared case management for the client so that outcomes can be effectively tracked.
- Data Matching/Client Tracking—Partners will work together to create a holistic approach to data matching and client tracking. WSM anticipates continued conversations around data matching and shared goal outcomes.



Analyses include only cases with adult recipients. Employment and earnings data are based on a stratified, random sample of TCA case closures between state fiscal years 2015 and 2019 and includes only formal employment in Maryland (n=1,228). All other data is based on analysis of 19,499 adults who received TCA benefits for at least one month in state fiscal year 2020.

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- Targeted Services for Hardest to Serve Clients—WIOA partners are committed to targeting comprehensive services for the hardest to serve customer that include coordinated programmatic elements. WSM and Health and Human Services plan to work together to pilot interventions for shared clients, focused on educational attainment and stackable credentials, career-driven placements, and long-term retention that ultimately leads to self-sufficiency.
- Two-Generation Approaches—WSM and Health and Human Services have partnered on a 2Gen grant to develop and pilot two-generational approaches to better align workforce and early childhood education services, engaging Early Head Start and Head Start grantees.

### CO-LOCATION OF SERVICES

Currently, Neighborhood Opportunity Network staff provide customers at the Wheaton Job Center with TANF, SNAP and other Health and Human Services screening and referrals once per week. WSM and Health and Human Services will engage in discussions to explore potential co-location and collaboration opportunities to best meet collective needs.

### LEVERAGING EXISTING RESOURCES

Health and Human Services currently dedicates staff on site through leveraged resources. HHS is open to determining what concrete in-kind contributions would be beneficial—including and not limited to educational/marketing resources/materials and access to facilities/space. WSM and Health and Human Services will collectively strategize to explore how best to leverage respective federal funding streams and grant opportunities. WSM has been awarded the 2-Gen Poverty grant from Innovate + Educate and the Kellogg foundation. WSM is utilizing family-centered best practices to best address employability.

### STAFF DEVELOPMENT

Staff development and training is key to successful delivery of service. Health and Human Services is committed to attending OSO meetings and providing relevant subject matter expertise on the TANF program, and updates on Health and Human Service programs. They will ensure that their TANF contractor fully engages in partnership opportunities and appropriate staff trainings to align staff knowledge. WSM and Health and Human Services will explore

other ways to cross-train and provide technical assistance to ensure a seamless delivery of service for TANF and WIOA customers.

### WORK PARTICIPATION RATE CONSIDERATIONS

Currently, TANF customers are mandated to provide weekly timesheets to track their work participation. Health and Human Services and WSM will coordinate to ensure that any TANF recipients receiving WIOA services submit their timesheets to be tracked by the TANF contractor. The partners will explore other options to improve the usability and accountability of work participation rate tracking.

### EMPLOYER INITIATIVES

As the single point-of-entry and the broker between employer demand and qualified job seekers, WSM has launched a strong outreach program utilizing multiple communication strategies. Lead by the Communication Committee, communication and outreach efforts target employer engagement in pipeline development and employability initiatives. WSM, sub-contractors, and Health and Human Services will work together to implement these initiatives. Outreach activities include, but are not limited to:

- Meet and greet sessions for the chambers of commerce and area businesses associations
- Development of various collateral materials
- Quarterly newsletters
- Website enhancements
- Active presence on social media outlets

These efforts will compliment what the WSM, the OSO, and partners are currently doing by targeting employers to commit to career-specific placements and developing training aligned to career pathways. TANF representation will also be incorporated as part of the new Business Solutions Team efforts.

## SECTION IX

### **COORDINATION OF DATA**

The WIOA and Health and Human Services partners will work with their respective state entities to provide baseline data and develop coordinated strategies for program reporting. WSM is seeking out new avenues for technology to streamline the process for data collection by population. They will soon initiate the use of a new CRM platform that will allow for better tracking of data in real time. WSM is also committed to allowing more “read only” access to their databases for partners to see who is registered. Core partners are currently reviewing opportunities to share data more effectively across programs.

### **REPRESENTATION ON THE WORKFORCE DEVELOPMENT BOARD**

The Director of Health and Human Services is an active member of the WDB. In addition, the HHS director has been part of the WDB’s Strategic Planning Team to ensure that the strategies address the needs of this population. In addition, the director was part of the local planning group that has been involved in the development of this plan. Health and Human Services has strong representation with all AJC partners in Montgomery County that evaluate and continuously improve access and services for all individuals at the centers.



SECTION X

**COMMUNITY DEVELOPMENT BLOCK GRANT FUNCTIONS**

**COMMUNITY SERVICE BLOCK GRANT PROVIDERS**

Meeting the needs of Montgomery County requires the leveraging of resources from partner organizations in the community. Center partners have representatives from a Community Service Block Grant (CSBG) provider, specifically the Montgomery County Community Action Association director, Sharon Strauss, began her tenure on the WDB in 2021. The Board recognizes that CSBG organizations and partners provide services and access to resource to assists our clients in areas beyond traditional services provided by AJCs. The ability to refer clients to services that will assist them and their families in areas such as, but not limited to: housing, healthcare, childcare, literacy, transportation, counseling services, will greatly enhance the success of the clients served.

As part ongoing training activities, the WDB—through the Operator—conducts scheduled trainings for all partner agencies with the AJC. CSBG service providers have and will continue to be invited to conduct training sessions for partner agencies. At minimum, these training sessions provide a general overview of services provided, eligibility requirements and referral and tracking processes.

Public Service Grants Funded by the Community Service Block Grant (CSBG) Program July 1, 2020–June 30, 2021:

- **A Wider Circle, Inc. \$45,000 “Workforce Development Program”**  
Provides holistic, intensive, and highly personalized support to adults seeking to enter or re-enter the workforce. Estimated to benefit 1000 clients.
- **Artpreneurs, Inc., dba Arts on the Block \$25,000 “Library Lanterns: Leveraging IoT to Light a Path Toward STEAM Learning”**  
Provides support for four after-school workshops and a one-week summer camp to help close the STEAM academic achievement gap. Estimated to benefit 2,177 clients.
- **CASA de Maryland, Inc. \$45,000 “Career Focused Pre-Apprenticeship Youth Program”**  
Provides a workforce readiness program,

including six-month internships and workshops, focusing on post-secondary education awareness, career exploration, and workforce readiness. Estimated to benefit 8 youth.

- **Community Bridges, Inc. \$30,000 “CB College and Career Planning Program and Alumnae Program”**  
Provides college and career planning opportunities to girls from low-income and immigrant backgrounds. Estimated to benefit 225 students.
- **Community Reach of Montgomery County, Inc. \$45,000 “REAP: Rockville Emergency Assistance Program”**  
Provides case management services and financial assistance to low-income County residents facing eviction or utility terminations, or who are in need of expensive prescriptions or other basic needs, or who need social service referrals for dental and vision care, clothing, food, or refurbished computers. Estimated to benefit 275 clients.
- **The Ethiopian Community Center, Inc. \$45,000 “African Immigrant Workforce Development Program”**  
Provides a two-track workforce development program for African immigrant residents. The first track will connect participants to career development and skill training programs and the second will connect participants to jobs. The program curriculum combines culturally/linguistically targeted training, counseling, and resource navigation. Estimated to benefit 80 clients.
- **EveryMind, Inc. \$45,000 “SASS - Stabilizing Adults through Situational Support”**  
Provides assistance to low-income residents in preventing evictions, securing shelter, making and keeping appointments for physical and mental medical health care services, and finding and keeping jobs. Estimated to benefit 140 clients.
- **Interfaith Works, Inc. \$40,543 “IW Connections”**  
Provides bilingual (English and Spanish) Outreach Coordinators at the IW Clothing who meet with clients to conduct comprehensive needs assessments, gather information to make referrals to appropriate partner service providers, and educate clients about available assistance. Estimated to benefit 750 clients.
- **Montgomery County Coalition for The Homeless, Inc. \$45,000 “Home Builders Care**

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**Assessment Center Diversion Specialist”**

Provides a Diversion Specialist (DS) at the HBCAC emergency shelter to work with men who are experiencing a housing crisis to quickly identify and access safe and appropriate alternatives to emergency shelter. Estimated to benefit 35 clients.

- **Mobile Medical Care, Inc. \$40,000 “Expanding Family Planning Options for Uninsured, Low-Income Women”**

Provides safe and effective long-acting reversible contraception (LARC) for low-income, uninsured Montgomery County women for whom other birth control methods are not a viable family planning option. Estimated to benefit 60 clients.

- **Montgomery Housing Partnership, Inc. (MHP) \$45,000 “Middle School Afterschool Program in Wheaton and Takoma Park”**

Provides an afterschool academic enrichment program for middle school students at two MHP affordable housing properties (Amherst Square/ Pembroke Square Apartments in Wheaton, and Sligo View Apartments in Takoma Park). Estimated to benefit 35 students.

- **NAMI Montgomery County (MD), Inc. \$27,500 “Mental Health Programs for Low-income Latinx Residents”**

Provides free mental health support groups, presentations and classes in Spanish at no cost to participants for the local Latinx community. The programs will support and educate low-income Spanish-speaking individuals living with mental illness and their family members. Estimated to benefit 425 clients.

- **Per Scholas, Inc. \$45,000 “Per Scholas NCR IT Job Training”**

Provides for a IT-focused Job Training Program for low-income Montgomery County residents, connecting them to jobs that are immediately available and providing ongoing post-employment support. Estimated to benefit 40 clients.

- **The Shepherd’s Table, Inc. \$24,457 “Food Services Program”**

Pays a portion of salaries for two Chefs in a program that provides free meals to the homeless. Estimated to benefit 2,700 clients.

The WDB will provide space to the providers in the AJC to meet with clients. They will be encouraged to participate in the MOU and RSAB to become key partners in the AJC. Supporting the AJC can be in-kind, cash or a combination of both. By working together, we can leverage limited resources more effectively. Additionally, the AJC’s BST will promote their services to the business community so that they are aware of service offerings and resources.

An ongoing challenge is the development of a tracking and referral system. The ultimate goal would be having a single reporting system in which all data is shared in a confidential manner. Due to different funding streams and related rules and policies, tracking and sharing of information is problematic. However, the WDB and partner agencies have developed a tracking/referral system which ensures clients are served.

Through community outreach and networking, the WDB will meet with the county grant program manager, DHS and CBOs to ensure that they are all aware of new service offerings and that information about various events are shared. The CAA is a mandated partner of our Job Center. The RSA leverages \$263,749 of in-kind contributions from our partners.

SECTION XI

**JOBS FOR VETERANS STATE GRANTS FUNCTIONS**

**PRIORITY OF SERVICE TO VETERANS AND ELIGIBLE SPOUSES**

The AJC provides “Priority of Service” to veterans and their eligible spouses in accordance with the Jobs for Veterans Act of 2002 and the Veterans’ Benefits, Health Care, and Information Technology Act of 2006. The purpose of Priority of Service is to give first consideration for program participation to covered Veterans and eligible spouses who also meet the eligibility criteria of a federal Department of Labor training, employment, or placement service in any workforce preparation program. Local Workforce Development Areas will ensure all vendors follow Priority of Service provisions.

To receive Veterans Priority of Service for a specific program, a Veteran or eligible spouse must meet the statutory definition of a “covered person” and also must meet any other statutory eligibility requirement applicable to the program. For all USDOL funded programs, Priority of Service means access to services or resources earlier than others, or if resources are limited, it may mean access to services and resources instead of general service individuals.

Veterans Priority of Service will take precedence before applying WIOA Priority of Service for recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient. Programs with specific eligibility criteria, such as the WIOA Title I Adult program, will ensure covered persons meet all statutory eligibility requirements for the program before receiving Priority of Service.

Note: All criteria for veteran and spouse eligibility will be applied as written in Maryland’s WIOA State Plan, Section 9. (review for more details on veteran and spouse eligibility).

In accordance with Maryland’s State Plan, veterans and eligible spouses will continue to receive priority of service for all USDOL-funded job training programs, which include WIOA programs. However, as described in TEGL 10-09, when programs are statutorily required to provide priority for a particular group of individuals, such as the WIOA priority described below, priority must be provided in the following order:

1. First, to veterans and eligible spouses who are also included in the groups given statutory priority for WIOA adult formula funds. This means that veterans and eligible spouses who are also

recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient would receive first priority for services provided with WIOA adult formula funds.

2. Second, to non-covered persons (that is, individuals who are not veterans or eligible spouses) who are included in the groups given priority for WIOA adult formula funds.
3. Third, to veterans and eligible spouses who are not included in WIOA’s priority groups.
4. Last, to non-covered persons outside the groups given priority under WIOA.

Priority	Population Group
1st	Veterans and eligible spouses who are also low-income, recipients of public assistance and/or basic skills deficient
2nd	Individuals who are not veterans or eligible spouses, are recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient
3rd	Veterans and eligible spouses who did not meet “first priority” conditions
4th	Individuals who are residents of the Montgomery County Local Area and who are not veterans and do not meet criteria to be considered a target population

**CUSTOMER SERVICE FLOW FOR VETERANS**

AJC staff provides core services and initial assessments to veterans. The receptionist or other AJC staff who work at the front desks are trained to determine whether any customers are veterans. Information can also be gathered on veteran status when the AJC front desk has customers complete their county’s “Customer Activity Sheet”. Customers who self-attest to veteran status shall receive priority of service from this point forward.

AJC staff conduct the initial Personalized Needs Assessment with all new customers (including veterans). If a customer self-attests to veteran status, AJC staff complete MD Labor’s Significant Barrier to Employment (SBE) Checklist to determine whether the veteran qualifies as having one or more SBE.

When the Personalized Needs Assessment is completed, veterans choose from the following options:

1. If the customer qualifies as SBE, and requires intensive services to overcome a barrier to employment, AJC staff assists in setting up an

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appointment for them to meet with a Disabled Veteran Outreach Program (DVOP) Specialist.

2. If the customer does not require intensive services, they are then referred to Basic Career Services resources, WIOA Title I resources, an AJC Job Service Specialist, or other resource as determined appropriate based on the Personalized Needs Assessment.

**Note:** When a veteran seeks services at an AJC where the DVOP is not currently available because of their rotation schedule, the receptionist provides the customer with the card and contact information of the DVOP and contacts the DVOP via email to provide them with the contact information of the customer so the two can coordinate a meeting time when the DVOP will be stationed at the AJC, if desired.

**VERIFYING VETERAN STATUS**

Any individual **self-identifying** as a covered person should be provided immediate priority in the delivery of employment and training services. It is neither necessary nor appropriate to require an individual self-identifying as a veteran or eligible spouse to verify their status at the point of entry unless the individual who self-identifies as a covered Veteran or eligible spouse:

1. Is to immediately undergo eligibility determination and must be registered or enrolled in a program; or,
2. The applicable Federal program rules require verification of covered Veteran or eligible spouse status at that time.

Similarly, a covered person should not be denied access on a priority basis to any services provided by program staff in order to verify covered person status. Rather, an individual self-identifying as a Veteran or eligible spouse should be enrolled and provided immediate priority and then be permitted to follow-up subsequently with any required verification of his or her status as a Veteran or eligible spouse.

**For services that require eligibility verification, such as classroom training, verification only needs to occur at the point at which a decision is made to commit the use of outside resources.** For example, to receive training services under WIOA Title I programs, veteran status must be verified. In cases such as these, verification is only necessary where a decision is made to commit outside resources to a covered person over another individual. For all other purposes, covered persons should be enrolled and provided immediate

priority before providing verification as a covered person.

To receive Priority of Service for career services, covered persons may self-attest their veteran or eligible spouse status.

**VETERANS & SPOUSES AS DISLOCATED WORKERS**

WIOA Title I Dislocated Worker Funds can help Veterans, separating service members, and eligible spouses to enter or reenter the civilian labor force. To receive services under the WIOA Title I Dislocated Worker Program, a Veteran or eligible spouse must be a dislocated worker. By definition, according to WIOA, a dislocated worker is an individual who:

1. Has been terminated or laid off, or received a notice of termination or layoff from employment;
2. Is eligible for, or has exhausted, unemployment insurance (UI) benefits;
3. Has demonstrated an appropriate attachment to the workforce, but is not eligible for UI and is unlikely to return to a previous industry or occupation;
4. Has been terminated or laid off, or **received notification** of termination or layoff from employment as a result of a permanent closure or substantial layoff;
5. Is employed at a facility where the employer has made the general announcement that the facility will close within 180 days;
6. Was self-employed, but is unemployed as a result of general economic conditions in the community or because of a natural disaster;
7. Is a displaced homemaker as defined by WIOA 3(16); or,
8. Is the spouse of a member of the Armed Forces on active duty (as defined in section 101(d)(1) of Title 10, U.S.C.), and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or is the spouse of a member of the Armed Forces on active duty and is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

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**Generally, service members exiting the military, including, but not limited to, recipients of Unemployment Compensation for Ex-Military members (UCX), qualify as dislocated workers. Active duty service members who separate by retirement may also qualify as dislocated workers. However, an active duty service member taking early retirement as an incentive must be taken on a case by case basis. In some cases, this type of separation may be the only choice a service member may have. Thus, the service member’s retirement could be considered a dislocation. However, if the service member’s separation is voluntary, then the service member would not qualify as a dislocated worker.**

If a Veteran meets the definition of a dislocated worker, then they may also be eligible to receive Priority of Service. For WIOA Title I programs, Priority of Service is available to any Veteran who has served at least one day in the active military, naval, or air service, and who was discharged or released under conditions other than dishonorable. AJCs may consider documentation of a service member’s release from active duty on a specific date as equivalent to a layoff notice for WIOA Dislocated Worker Program eligibility. However, service members are not eligible for Priority of Service until they leave active duty.

In the case of separating service members, because they may be on a terminal leave from the military, a separating service member may begin to receive career services while the service member may still be part of the Active Duty military, but has an imminent separation date. It is appropriate to provide career services to separating service members who will be imminently separating from the military, provided that their discharge will be anything other than dishonorable.

**JOBS FOR VETERANS STATE GRANT (JVSG) FUNDS ARE PROVIDED TO FUND TWO STAFF POSITIONS**

**Disabled Veterans’ Outreach Program (DVOP) Specialists** – Under 38 U.S.C. 4103A(a), a DVOP specialist provides intensive services and facilitates placements to meet the employment needs of veterans, prioritizing service to special disabled veterans, other disabled veterans, and other categories of veterans in accordance with priorities determined by the USDOL Secretary; and

**Local Veterans’ Employment Representatives (LVER)** – Under 38 U.S.C. 4104(b), the LVER’s principal duties are to: (1) conduct outreach to employers in the area to assist veterans in gaining employment, including conducting seminars for employers and, in conjunction with employers, conducting job search workshops and establishing job search groups; and (2) facilitate employment, training, and placement services furnished to veterans in a State under the applicable State employment service delivery systems.

**MONITORING PRIORITY OF SERVICE**

To ensure priority of service is implemented and operating correctly it will be monitored by the Regional Local Veterans Employment Representative (RLVER) and by the Labor Exchange Administrator or whomever they designate.

**ENGAGING LVERS**

Local Veterans Employment Representatives (LVER) conduct outreach to employers and engage in advocacy efforts with hiring executives to increase employment opportunities for veterans and encourage the hiring of veterans. The Local Board will promote LVER services through social media, job fairs and email blasts based on information provided to the Local Board by the LVER. The Local Board will include the LVER in employer meetings convened in support of determining employer needs related to Career Services, Training Services, or Educational Services. The LVER will be included in meetings and efforts convened by and on behalf of the AJC Partners, including meetings and efforts convened by the One Stop Operator.



## SECTION XII

### **TRADE ADJUSTMENT ASSISTANCE FOR WORKERS PROGRAM FUNCTIONS**

#### **TAA SERVICES PROVIDED IN THE AJC SYSTEM**

Trade affected workers will be co-enrolled with the WIOA dislocated worker program or other appropriate program to ensure the availability of a comprehensive array of services and the integration of workforce development programs. Trade staff and WIOA partners will coordinate efforts to provide opportunities for Trade affected workers to obtain skills, services, resources and support in a quick and effective manner to return the trade-affected worker back to suitable employment.

#### **TITLE I PROVISION OF TAA SERVICES**

Partner staff in the American Job Center will be responsible for providing the initial meeting and assessments, ensure enrollment in MWE, labor market information and delivering Rapid Response service, if not already provided and to make the participants aware of all the available services and allowances that the Trade Adjustment Assistance Program can provide. Trade staff will work with the trade affected worker on training options,

completing TAA application MWE and to ensure the six criteria for training have been met, as well as create or review participants' IEP. Trade staff will also provide approval of all TAA training programs, training contracts and training waivers. Efforts will be coordinated to monitor progress, provide Bench marks every 60 days and ensure a service is provided every 90 days for the Trade affected worker, as well as ensure any needs and barriers are addressed. Staff will coordinate on all employment, case management and follow-up activities.

#### **CO-ENROLLMENT**

By following an established process flow within the AJC, co-enrollment of Trade affected workers will be ensured to allow for more efficient use of public workforce system resources and reduce barriers to program integration. Participants will be made aware of their co-enrollment. In the event that a Trade affected worker declines co-enrollment or is not eligible for co-enrollment, documentation must be provided and maintained. Declining co-enrollment has not effect on eligibility for benefits and services under the TAA Program.

## SECTION XIII

### UNEMPLOYMENT INSURANCE FUNCTION

WIOA staff work side-by-side with Wagner-Peyser staff, particularly in the job center's resource area. The One Stop Operator and AJC partners have developed clear roles and responsibilities to provide for the elimination of duplication of service and promote easier access for all job seekers.

Wagner-Peyser staff are key to supporting the labor exchange program that brings together individuals who are receiving unemployment compensation, seeking employment, and employers who are seeking employees. The Wagner Peyser program and Reemployment Services and Eligibility Assessment (RESEA) and Reemployment Opportunity Workshops (ROW) programs provide claimants access to the full menu of services of the AJC through RESEA and WIOA programs. An AJC staff member presents information during both workshops about services, resources and job opportunities - and at the conclusion of the

workshop, the Wagner Peyser staff meets one on one with each ROW and RESEA customer to identify their needs and refer them to other services e.g. WIOA, employment opportunities and/or to other workforce partners in the One-Stop.

Both WIOA and Wagner-Peyser staff provide services to the employer community, as well as to job seekers who are receiving unemployment benefits. Multiple employer services include assistance with screening qualified applicants, assessing/testing applicants, and assistance with application processing.

WSM staff have been attending UI training in order to provide better access to the services in the AJC and introduce and invite the customers to workshops and hiring events at the AJC. Additionally, WSM staff have access to the Beacon Database system to monitor any issues that UI claimants have reported and determine if they are able to provide additional guidance.



## SECTION XIV

### SENIOR COMMUNITY SERVICE EMPLOYMENT PROGRAM FUNCTION

#### SCSEP PROVIDER

The SCSEP Director is currently part of the local Strategic Partnership workgroup to promote services for Seniors (50+) in the AJC. SCSEP Staff are available to provide services in the center at least once a week. The Jewish Council for Aging is the SCSEP provider.

Montgomery County has been steadfast in its commitment to a community where people can age, remain, and thrive, or what has been termed: “A Community for a Lifetime.” Employers also recognize the enormous contributions that are made by a large, diverse, and rapidly growing older population.

WSM and the WDB partner with JCA’s Senior Community Service Employment Program (SCSEP), which places low-income senior (50+) job seekers in paid training to refresh skills and provide hands-on experience. The “community service” piece is internship placements with nonprofits and government agencies, allowing our seniors to build their resumes while delivering valuable community service.

Our partners at the Jewish Council on Aging also offer an excellent program, The Career Gateway, a five-day workshop with the low cost of \$75. Through intensive training, long-term mentorship, and individualized attention, this workshop is a terrific resource for midlevel managers and other professionals.

While all American Job Center workshops are open to job seekers of any age, WSM periodically hosts a “Job Seekers Over 50” workshop at both the Germantown and Wheaton Job Center locations. This two-hour workshop provides strategies specific to marketing the 50+ job seeker.

Understanding the unique needs of the 50+ job seeker, WSM maintains a dedicated page on its website listing available resources: <https://worksourcemontgomery.com/career-support/proud-to-serve/50-plus/>

Finally, as previously noted, WSM partners with the Jewish Council on Aging in hosting the annual 50+ Employment Expo. Dozens of employers, as well as organizations that support seniors, attend the expo. There is no fee to attend as a job seeker, no registration fee for employers, and parking is also free.

Job seekers over age 50 also have the opportunity to participate in “pop-up” outreach activities. WDB and SCSEP collaborate on several activities such as 50+ club, Older Adults Technology Training and annual 50+ employment expo.

## SECTION XV

### WIOA SECTION 188 AND EQUAL OPPORTUNITY FUNCTIONS

#### WorkSource Montgomery's designated Equal Opportunity Officer is:

Cynthia Grissom  
WSM Director of Talent Development  
1801 Rockville Pike, Suite 320, Rockville, MD 20852  
Email: [Cgrissom@worksourcemontgomery.com](mailto:Cgrissom@worksourcemontgomery.com)  
(240)641-6730  
TTY: (301)929-6888

#### DESCRIPTION OF COMPLIANCE WITH SECTION 188 OF WIOA AND 29CRF PART 38

WDB has a zero-tolerance policy on discrimination on the grounds of race, color, religion, sex, national origin, age, disability, gender identity, political affiliation or belief for any workforce or education program or activity.

The WDB provides policies and procedures for all subcontractors on informing customers of their rights, under WIOA Title I and detailing the complaint process. All WIOA enrollees receive a copy of their federally protected rights. Customers and staff have the right to report alleged discrimination to the EEO Officer at WSM, who is not in direct line of program oversight. WDB monitors compliance with the American with Disabilities Act (ADA) in all AJC and affiliate centers who provide WIOA services offered through program operators. The AJC will make visible to participants that the centers are ADA compliant and are equipped with auxiliary aids and accommodations to serve individuals with disabilities. Within the centers, assistive technology is available for use, including ADA-compliant computers in the resource rooms and classrooms.

The WDB ensures subcontractors follow all procedures as indicated in federal, state, and local policies and WIOA regulations. WDB staff will provide overall oversight and monitoring for WIOA activities. Each sub-contractor will be responsible for identifying staff to conduct internal monitoring on a regular basis. As part of ongoing monitoring, the WDB reviews the intake and enrollment processes, display of federal signs, case files, accessibility for all customers, and programmatic specific compliance for WIOA, Priority of Services, training services and accessibility every six months. AJC partners' staff will also receive ADA compliance training to ensure compliance is met at all levels of engagement once a year.

#### COMPLIANCE WITH ADA

WDB and AJC partners are required to provide reasonable accommodation for individuals with disabilities to ensure equal access and opportunity as both employers and providers of service.

WorkSource Montgomery will be the entity responsible for ensuring the American Job Centers in Montgomery County meet accessibility requirements. Maryland Department of Labor will support accessibility compliance at the Wheaton Job Center. The Division of Rehabilitation will provide technical assistance around accessibility and accommodations.

WorkSource Montgomery considers individuals with disabilities an important element of diversity and ability within the AJCs. Individuals with disabilities must be treated with respect and give customer-centric services within both the universal AJC offerings, as well as within WIOA and other WorkSource Montgomery programmatic offerings.

No individual is to be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in any program or activity, funded in whole or in part under WIOA, due to race, color, religion, sex, gender identity, national origin, age, disability, or political affiliation or belief.

Program operators must use the same processes for all customers, including individuals with disabilities. The program operator will also make reasonable modifications in practices and procedures when the modifications are necessary to avoid discrimination on the basis of disability, unless making the modifications would fundamentally alter the nature of the service, program, or activity. The need for an accommodation/modification shall not adversely affect the consideration of a qualified individual with a disability for aid, benefits, services, and training.

All sub-recipients and contractors as part of their contractual agreements are required to be compliant with all board policies and procedures which are included in the Job Center Operational Manual (<https://worksourcemontgomery.com/wp-content/uploads/2018/10/AJC-Procedures-Manual-3.22.18.pdf>).

Individuals, specific classes of individuals, or authorized representatives may file complaints/allegations of discrimination regarding WorkSource Montgomery under the following policy guidelines.



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WorkSource Montgomery (WSM) will make every effort to provide a professional and positive environment focused on providing career services to customers. Whenever possible, we will address complaints or grievances within 14 days of submission.

Participants, sub-recipients, and contractor employees are encouraged to communicate program issues first to the staff who can assist in the area of concern. Issues that need to be escalated should be referred to the WSM Career Services Manager.

You may file a formal written grievance as follows:

You have up to 180 days to file an EEO- or non-EEO-grievance. Your grievance must be in writing and must contain the following information:

- your name;
- mailing address, or other means by which you can be contacted;
- identification of individual(s) responsible for alleged issue;
- a description of the allegation(s), which must include enough details to determine the jurisdiction of the complaint;
- the date(s) the alleged incident(s) took place; and
- the complainant's signature or the signature of his/her authorized representative and the date of signature.

You may file your grievance with the WSM Career Services Manager:

Kirk Carrington  
Career Services Manager  
WorkSource Montgomery, Inc.  
11510 Georgia Avenue, Wheaton, MD 20902  
Email: [kcarrington@worksourcemontgomery.com](mailto:kcarrington@worksourcemontgomery.com)

You may also file a grievance with the WSM Director of Programs:

Camille McKenzie  
WorkSource Montgomery, Inc.  
11510 Georgia Ave., Wheaton, MD 20902  
Email: [cmckenzie@worksourcemontgomery.com](mailto:cmckenzie@worksourcemontgomery.com)

Or, the EEO Officer:

Cynthia Grissom  
WorkSource Montgomery, Inc.  
1802 Rockville Pike #320, Rockville, MD 20852  
Email: [cgrissom@worksourcemontgomery.com](mailto:cgrissom@worksourcemontgomery.com)

### Grievance Procedure Timeline

1. Within 2 days from the receipt of a grievance, the WSM Career Services Manager will contact the customer.
2. Within 14 days of receiving a grievance, the WSM Career Services Manager will attempt to resolve the matter informally.
3. If a resolution cannot be reached within the initial 14-day period, then a formal hearing will be scheduled. The formal hearing provides customers with an opportunity to present any evidence.
4. Within 30 days from the date that the original grievance was received, and or upon conclusion of the hearing process (whichever is sooner), the WSM Executive Director will issue a decision. The final decision will be issued within 10 days from the date of the hearing and not more than 60 days from the date of the initial submission of the formal grievance.

### Appeal

If the EEO-complaint grieving party does not receive a decision within 60 days of filing the formal grievance, or receives an unsatisfactory decision, the aggrieved has a right to request a review by the Civil Rights Center at the US Department of Labor.

Assistive technology is available in all centers and affiliate sites. This technology ensures effective methods for individuals with disabilities to access all services. Additional accommodations, equipment, and interpreters can be accessed as needed.

A non-exhaustive list of auxiliary aids and services can be found in 29 CFR § 38.4, and includes:

- Qualified interpreters, note-takers, transcription services, written materials, telephone handset amplifiers, assistive listening systems, telephones compatible with hearing aids, closed caption decoders, open and closed captioning, telecommunications devices for deaf persons (TDDs/TTYs, video telephones, or video remote interpreting devices), videotext displays, or other effective means of making orally delivered materials available to individuals with hearing impairments.



## SECTION XV

- Qualified readers, taped texts, audio recordings, brailled materials, large print materials, or other effective means of making visually delivered materials available to individuals with visual impairments. Acquisition or modification of equipment or devices. Ensure Job Centers are American with Disabilities Act (ADA) compliant and equipped with auxiliary aids and accommodations. This should include a list of currently available assistive technology devices and services within the centers available for individuals.
- Ensure individuals are aware of compliance through use of signs or other means of visibility. “Equal Opportunity is the Law” must be prominently displayed within the Job Centers and made available in other formats as requested.
- Rejection of all job orders from any employer that specifies it will not accept applications from individuals with disabilities or from applicants with a certain disability. Under the law, individuals with disabilities must be referred for the same range of positions as any other qualified customer.
- Maintain confidentiality and not disclose disability-related or other medical information about an individual to an employer or partnering organization unless the job seeker has requested the disclosure on their behalf.
- Incorporate information on accommodations and rights of all individuals, including individuals with disabilities, in orientations.
- Refrain from stereotyping individuals with disabilities when evaluating their skills, abilities, interests and needs.
- Periodically review eligibility criteria for services or training to eliminate elements that may screen out individuals with disabilities (unless criteria are directly related to specific training or services and is essential).
- WSM is also deploying several other resources to increase access including a virtual services portal (career edge-URL WSMEdge, Metrix Learning with significant content available to all county residents, the Mobile AJC set for delivery in 2022, and the creation of the Community Impact Team which is tasked with developing relationships with community and faith-based groups across the county to promote WSM services.

### ACKNOWLEDGEMENT OF UNDERSTANDING

Montgomery County WDB acknowledges a strong understanding that while Section 188 of WIOA and 29 CFR Part 39 ensure equal opportunity for individuals with disabilities, sub-recipients may also be subject to the requirements of:

- Section 504 of the Rehabilitation Act, which prohibits discrimination against individuals with disabilities by recipients of Federal financial assistance;
- Title I of the ADA, which prohibits discrimination in employment based on disability;
- Title II of the ADA, which prohibits State and local governments from discriminating on the basis of disability;
- Section 427 of the General Education Provisions Act; and
- Maryland Anti-Discrimination laws, including Code Ann. §10-1102-1103, which stipulates that oral language services must be delivered on-site for those in frequent contact with a service provider.

### GRIEVANCE POLICY

The policy to address all grievances is included in the Job Center Operational Manual (<https://worksourcemontgomery.com/wp-content/uploads/2018/10/AJC-Procedures-Manual-3.22.18.pdf>) posted on our website. After receipt of a formal grievance, the deciding official shall consider and attempt to resolve the grievance, to the extent resolution is, in the deciding official’s judgment, warranted. If the grievance cannot be resolved in a manner acceptable to the aggrieved, the deciding official shall refer the grievance to the for his/her consideration and final decision.

Upon receipt of a formal grievance, the deciding official shall consider and attempt to resolve the grievance, to the extent resolution is, in the deciding official’s judgment, warranted. Within 14 days of receipt of the formal grievance, the grievance cannot be resolved in a manner acceptable to the aggrieved, the deciding official shall refer the grievance to the Executive Director for his/her consideration and final decision.

The deciding official, or the Executive Director in the event of referral to him/her for final decision, shall conduct a hearing of the nature and scope appropriate to the issues involved in the grievance, within 30 calendar days of the filing of the formal grievance.

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For non-WIOA programs funded through MD Labor, if the grieving party does not receive a decision within 60 days of filing the formal grievance, or receives an unsatisfactory decision, the aggrieved then has a right to request a review by the Maryland Department of Labor.

For programs other than those funded by MD Labor, the grievance procedures and appeal process shall be those specific to the funding source.

**ACCOMODATION REQUESTS**

Under the ADA, an individual with a disability can request an accommodation and assistance in order to understand, use and benefit from the services in the One-Stop Center and youth providers. During the initial visit to the Center, or through virtual or other correspondence, an individual can ask for assistance to understand and/or access the range of services the programs offer.

Some accommodations may include:

- An individual meeting rather than group orientation
- Help with filling out any registration forms
- Brochures, flyers, and other information in an alternative format such as a different language, Braille, or large print ;
- Sign language interpretation
- Using a tape recorder to remember information
- Adaptive equipment to use computers and phones

WSM and the WDB will take reasonable steps to provide auxiliary aids and materials to ensure that communications with individuals with disabilities, including individuals with visual or hearing impairments are assisted. Examples include but are not limited to: large print, Braille, interpreting services, allowing people with visual or learning disabilities or who have limited use of their hands access to tape recorders or a computer. Furthermore the WDB and its partners have the Centers and affiliate sites assessed annually for compliance as well as provide ADA professional development training to all new staff as part of the onboarding process.

**INDIVIDUALS WITH LIMITED ENGLISH PROFICIENCY**

As Montgomery County has a strong and diverse immigrant population, WSM partners with the Gilchrist Immigrant Center, Upwardly Global and Montgomery Coalition for Adult English Literacy to provide comprehensive services to individuals with limited English proficiency.

The WDB complies with the Maryland Anti-Discrimination laws, including MD Ann. Code, State Government, §10-1101 et seq., which stipulates that oral language services must be delivered on-site for those in frequent contact with a service provider. WDB disseminates information to limited-English speaking individuals through both oral and written means. Each of AJC partners have at least one staff and/or access to a member that is bilingual in English and Spanish. Many of the WSM staff are bilingual and are able to provide services in different languages. Bilingual brochures specifically designed for this community are also available and periodically updated. Recognizing that English language learners may have difficulty communicating their needs, available brochures will provide pictorial representations to ensure the message is effectively received. In addition, Wagner-Peyser staff provide ROW and RESEA workshops in Spanish regularly to support the needs of limited English-speaking individuals.

WDB anticipates expanding access to services and translation of documents into the six major languages spoken in Montgomery County: Spanish, Mandarin, French, Amharic, Korean, and Vietnamese. WDB staff members coordinate with the county’s Language Access Coordinator to stay up-to-date on county resources and capabilities for serving the county’s LEP population.

SECTION XVI

**FISCAL, PERFORMANCE, AND OTHER FUNCTIONS**

**DISPERSAL OF GRANT FUNDS**

WDB has developed a financial handbook that outlines policies, procedures and internal controls designed to record an report all financial transactions in accordance with Generally Accepted Accounting Principles (GAAP). The fiscal management systems include QuickBooks Online and Bill.com, an online electronic disbursement system, a third-party payroll processing service, supported by Excel for analysis purposes. Each source of revenue (i.e., grant or award) are accounted for using a specific “Class” assigned in QuickBooks. ALI costs expended with the source of funds are recorded to the specific, assigned Class.

All financial results by Class are compared to approved budgets. Program expenditures are processed through Bill.com and assigned to specific Classes and accounts within the Chart of Accounts.

All expenditures are routed through the Program Manager of the specific program for approval, review by the Financial Consultants, and reviewed and approved by the Executive Director prior to release for payment. Bill.com and QuickBooks are synchronized and updated electronically.

Summary reports of expenses by grant are reviewed by the fiscal agent, Executive Director and Board Finance Committee, and programmatic staff to ensure costs are properly assigned and within budgetary limits. Contractual obligations are tracked and tied to programmatic goals to monitor contractual obligations and expenditures. Capitalized assets are recorded in QuickBooks separately and depreciation is calculated and recorded on a monthly basis.

Cash reimbursement requests are submitted to MD Labor twice each month and the receivables are recorded in the accounting system and Excel cash forecast. WIOA formula funds are received from the county approximately 30 days after the request and non-formula funds are received from MD Labor approximately 21 days after the request. Knowing this, cost projections for the expected time to receive requested funds are made for payroll and for other recurring costs (rent, utilities, etc.) based on historical trends from the three previous months. These projections are added to the cash disbursements for the grant and aged invoices associated with the grant so that negative cash on

hand (reimbursable disbursements in excess of cash receipts) does not become too great. Aged payables are flagged according to the cash request that includes them so that checks can be written within three business days of receipt of the funds.

**DESCRIPTION OF FISCAL SUSTAINABILITY OF THE AJC SERVICES**

All fiscal procedures are guided by MD Labor issuances and monitored by an independent audit firm. WDB also utilizes braided funding practices and other resources to sustain quality service delivery in the Montgomery County Job Centers. The Executive Director and financial contractor regularly review funding levels to forecast significant changes in WIOA funding. WDB monitors the base costs of Job Center operation to be able to quickly develop a reduction plan in the event of reduced WIOA funding. In the event of a reduction of funding WDB will adjust the following as appropriate modify service provider contract, modify programs, or modify operation costs to ensure alignment with budget.

WSM maintains flexibility in how it manages the financial stability of the Job Center. There are minimal fixed costs and approximately 85% of WIOA funding is available for staffing and career services. WSM rents a facility appropriate for its size and budget. Our lease includes a defunding clause so we are not locked into a large expense that would cause financial difficulties if the budget shrank. Our personnel and professional services contracts are short-term, generally one year, so we have the flexibility to shrink or grow our annual operating budget based on our funding levels. Additionally, we braid multiple funding sources to supplement our budget which gives us the ability to adjust our operating budget by replacing funding that expires with new funding when needed, or to expand or contract our services.

**DESCRIPTION OF THE COMPETITIVE PROCESS IN AWARING SUBGRANTS AND CONTRACTS**

WDB is committed to following all federal, state, and local procurement policies and processes. WDB has established procurement policies and procedures which have been approved by the board. Services are announced for bid or proposal and evaluated by an independent team of either staff, board members and/or community

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members based on procurement thresholds. Contracts are awarded based on pre-established qualifications and scoring protocols. As outlined in the procurement policy, The WDB issued an RFP to procure six areas of services to build the workforce system infrastructure in Montgomery County.

The RFP invited proposers to:

- Deliver Adult, Dislocated Worker and Youth Services;
- Help build a career pathways system; and
- Act as the one stop operator.

The RFP process involved a set of rules to safeguard fair and objective decision-making when awarding grant funds. The rules comply with applicable federal, state and local requirements, i.e., Title 2 Code of Federal Regulations (CFR) Part 200. Notice of the RFP was sent to entities on WDB Bidders List (a list of local non and for-profit entities interested in conducting business with WDB which numbered over 50 organizations). Additionally, information regarding the RFP was legally noticed (i.e. published in local newspapers and on the WSM website). WSM has a procurement process that details the competitive selection procedures. The procedures prescribe for preparation of the Request of Proposal (RFPs) that include Board advisement. A Board review subcommittee makes a selection and recommends to the full Board as to the vendor. WSM contracts with the vendor.

WSM understands that it is incumbent on the organization to be good stewards of taxpayer funding. This includes ensuring that the entities with which we contract are fiscally sound. Along with application of the current Procurement Policy, WSM vets prospective vendors in the following manner:

1. WSM RFPs require that vendors supply a Maryland Certificate of Good Standing (or equivalent from the home state), Audits from the last 2 years, and verification of Minority Business Status, if applicable. WSM's Fiscal Team verifies the information and reviews Audits for general financial stability.
2. When WSM checks prospective vendor references, our representative also inquires about timeliness and accuracy of fiscal reporting

and invoicing.

3. During contract negotiations, WSM verifies and documents that the prospective vendor has necessary cash reserves.

**DESCRIPTION OF LOCAL LEVELS OF PERFORMANCE NEGOTIATED (SECTION 116(C))**

The Board negotiated the performance levels with the State under the guidelines of the TEGE 11-19. As a response to the State proposed outcomes, the Local Board analyzed historical participant level data and estimated the outcomes based on the WIOA definitions for performance metrics. The Board took into account current employment trends and economic conditions in the county. The tools used to come up with the suggested measures were suggested by MD Labor. These factors were considered when suggesting new performance levels which were accepted by the state.

**Actions Taken to Remain a High Performing Board**

The WDB Operation Committee is responsible for reviewing and evaluating the performance of the Montgomery County Job Centers and the One-Stop Operator. The committee reviews and evaluates quarterly reporting for WIOA performance indicators and conduct on-going analysis of programs and outcomes to identify trends and ensure data-led decision making. WDB is developing a data dashboard that includes key performance indicators of AJC and the economic impact of the workforce development system. The Board will require WSM to conduct annual independent evaluation of the service delivery system.

The Board will comply with Sections 107 and 116 of the Workforce Innovation and Opportunity Act (WIOA) by following requirements as to the Workforce Development Board structure and performance. In particular, the Board will review quarterly predictive reports that show WIOA performance indicators. The Governance Committee will be tasked with oversight of performance and funding.

In addition, the Board will be conducting and reviewing an on-going analysis of WIOA programs' outcomes that look at trends, causal relationships, and impact of the local area; making decisions accordingly if needed. A scorecard, with the outcome of each partner will be developed and reviewed at Alignment Committee meetings. The Board will strongly encourage all staff who

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work with clients and customers to participate in all trainings provided by the Maryland Department of Labor and the U.S. Department of Labor that relate to meeting performance standards. Staff may also attend other professional development trainings and conferences such as the National Association of Workforce Development Professionals (NAWDP) and other employment and trainings opportunities as appropriate. At the same time, all service providers (vendors) will receive periodic trainings on performance standards and strategies.

**ITA POLICY AND COMPLIANCE**

ITAs are the mechanism for providing Title I and EARN (when dual-enrolled in Title I) customers with the means to finance and obtain training to become employed full-time without additional subsidies.

The Workforce Development System established under WIOA legislation emphasizes informed customer choice, system performance and continuous improvement. After receiving services and in consultation with case managers, eligible participants who may benefit from training use the list of Maryland Eligible Training Service Providers to make an informed choice.

WIOA Sec. 134(c)(3)(G)(iii) states that “[t]raining services provided under this paragraph shall be directly linked to an in-demand industry sector or occupation in the local area or the planning region.” As such, the Board limits individual training to those industries and occupations that the Local Workforce Development Board deems in-demand. Those industries and occupations are identified on the documentation that clients received at intake. The Board has set a spending cap on all ITAs of \$3,500.00. This cap is reviewed on an annual basis. In all cases, the Board seeks to provide high-value training solutions by operating cohort trainings in the most in-demand and popular occupations and industries in the local area.

Training services may be made available to employed and unemployed adults, dislocated workers, and youth who:

- Have met the eligibility requirements of receiving career services and have been determined to be unable to obtain or retain employment through such services;
- After an interview and case management has determined the need of training services;

Current guidance for the development and approval of ITAs is as follows:

- Have researched and selected a program of training that is directly linked to employment opportunities either in the local area or in another area to which the participant is willing to relocate;
- Are unable to obtain grant assistance from other sources to pay the total cost of such training, including State funded training, Trade, Pell Grants or require WIOA assistance in addition to other sources of grant assistance.

ITAs will only be approved for positions on the High Demand Industry List, defined as jobs (1) in demand by employers, (2) have higher skill needs and will therefore likely provide family sustaining wages, and (3) are targeted to locally have 75 or more openings each year for the next five years.

Funding is based on appropriateness and funds availability. The individual funding for ITAs cap is \$3,500. AJC customers should never be guaranteed funds or training. No payments are made directly to an individual.

**A DESCRIPTION OF HOW TRAINING SERVICES UNDER CHAPTER 3 OF SUBTITLE B WILL BE PROVIDED IN ACCORDANCE WITH SECTION 134(C)(3)(G)**

Training services will be provided in accordance with 134(c)(3)(G) of the Workforce Innovation and Opportunity Act. Training services provided will maximize client’s choice in the selection of an eligible provider of such services. As required in the Workforce Innovation and Opportunity Act, training services shall be directly linked to an in-demand industry sector or occupation or related entry level career path course of study.

The Board will support both Individual Training Account (ITA) and On-the-Job training (OJT) models for training. OJTs are an example of a larger work & learn strategic priority of the Local Board and provide work experience for clients before they are hired and an opportunity for businesses to teach a potential employee and evaluate their suitability for the job. ITAs provide an opportunity for a client to study for and obtain certification or other credential through a training provider, which would allow him/her to obtain employment at the end of the study. The clients will be able to decide on the training and career track utilizing Labor Market Information provided to them.



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The WDB works with industries to identify and facilitate industry-led training. Core partners will target ITAs and cohort training approaches towards these targeted industries. If key training demanded by industry is not yet available through MD Labor approved training providers within Montgomery County, the WDB can provide a waiver for training under the following circumstances:

- There is an insufficient number of eligible training provider services to use ITAs;
- There is a training service program of demonstrated effectiveness that is offered by a community-based organization, a private organization, or an EARN Maryland program;
- The most appropriate training could be provided by an institution of higher education to train multiple individuals for jobs in in-demand sectors or occupations’
- A pay-for-performance contract is the most effective means of providing training services; or
- Providing training through a combination of ITAs and contracts is the most effective approach to placing a participant in a program.

Training services will be provided in accordance with 134(c)(3)(G) of the Workforce Innovation and Opportunity Act. Training services provided will maximize client’s choice in the selection of an eligible provider of such services. As required in the Workforce Innovation and Opportunity Act, training services shall be directly linked to an in-demand industry sector or occupation or related entry level career path course of study.

The Board will support both Individual Training Account (ITA) and On-the-Job training (OJT) models for training. OJTs are an example of a larger work & learn strategic priority of the Local Board and provide work experience for clients before they are hired and an opportunity for businesses to teach a potential employee and evaluate their suitability for the job. ITAs provide an opportunity for a client to study for and obtain certification or other credential through a training provider, which would allow him/her to obtain employment at the end of the study. The clients will be able to decide on the training and career track, utilizing labor market information provided to them.

Career Specialists will work with individuals and cohorts to identify training opportunities

that match their abilities, career interests, and labor market information. The Career Specialist will complete the training contract with the individual and training provider and submit the documentation to the training coordinator. The Training Coordinator will review the documentation and submit to the Director for budgetary and programmatic approval before training begins.

### **UTILIZING THE MARYLAND WORKFORCE EXCHANGE SYSTEM (MWE)**

WDB and AJC partners will utilize the Maryland Workforce Exchange (MWE) as the primary case management information system for programs carried out under WIOA and job center activities.

All information on activities, compliance, attendance, and case notes will be entered real-time by adult and youth sub-contractors. Subcontractor staff will monitor performance and compliance in the system on a regular basis. The WDB staff will run reports monthly to provide data integrity and compliance oversight to include predictive reporting and data analysis for continuous improvement purposes.

The core partners will work together to effectively collaborate on Maryland Workforce Exchange utilization across WIOA, Wagner-Peyser and general program functions for employers’ and job seekers’ benefit. Enhanced utilization of the Maryland Workforce Exchange will include workshop registration through the system, improved use of the Virtual Recruiter functions, and business solutions activities. Staff will also encourage customer use of the mobile application to support job matching activities within the Maryland Workforce Exchange.

### **OVERSIGHT AND MONITORING OF WIOA ACTIVITIES**

WSM staff will provide overall oversight and monitoring for WIOA activities. WSM Policy 2017-17 Subrecipient Monitoring Policy provides guidance in making informed decisions about subrecipient monitoring ensuring the proper use of federal funds authorized under the Workforce Innovation Act. The purpose of oversight and monitoring is to ensure that workforce development programs within WorkSource Montgomery are operating in accordance with all applicable federal, state, local regulations and policies associated with all WIOA funded sub-recipient agreements, and all

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appropriate administrative directives.

Monitoring will be scheduled twice a year, or anytime at the discretion of WorkSource Montgomery, Inc. to ensure that all services and programs are designed and operating to achieve expected results, to ensure funds are being spent for authorized purposes, to ensure reliable and timely information is captured, reported, and utilized to improve decision-making, and to aid in corrective action prior to oversight by grantors. Each contractor will be responsible for identifying staff to conduct internal monitoring on a regular basis. The WDB expects internal monitoring to include periodic comparisons of information entered into the Maryland Workforce Exchange and information kept in the physical case files for compliance purposes. In addition, the WDB expects that subcontractors will monitor data integrity in the Maryland Workforce Exchange to include assurance that case notes and activities are entered in a timely manner and that outcomes and soft exits are monitored properly.

The WDB will work closely with MD Labor and will comply with the requirement for all subcontractor agreements and contracts be monitored annually. WSM staff will monitor sub-contractors regarding both programmatic and fiscal compliance. As part of this process, the organization provides technical assistance to subcontractors as needed on all aspects of compliance and monitoring.

The WDB reviews the intake and enrollment processes, display of federal signs, case files, accessibility for all customers, and programmatic specific compliance for WIOA, Priority of Services, and training services.

Expenditures are tracked monthly to assure correct cost categories and that expenses are within contracted cost limitations. Expenditure related to Young Adulting program expenditures will be monitored to ensure compliance to expenditures related to training, work-based activities are being met. Additionally, frequent desk reviews are conducted on each WIOA contract.

The Operation Committee and Eckerd Connects both review any findings. Eckerd Connects staff will be responsible for recording all monitor findings, forwarding such findings and ensuring positive responses and corrective actions as needed. The WDB is committed to providing technical

assistance or seeking the proper expertise to rapidly remedy all issues and ensure positive practices and will ensure subcontractors take correction action pertaining to WIOA case file monitoring and data validation findings.

Training on policies and reporting requirements will be held for all partner agencies and contractors at minimum on a yearly basis. Local polices addressing the oversight of the AJC, youth programs and WIOA Title I programs are developed in response to MD Labor issuances, or internal needs. The WDB established a Policy Development Procedure based on MD Labor’s policy process. All policies are reviewed by the Board.

The procedure outlines key components required in policies and a five-step process for policy development:

1. **Identify Need for Policy**
2. **Policy Drafting**
3. **Policy Review by Subject Matter Experts and Committees**
4. **Review of Eckerd Connects**
5. **Review and Comment Period**

**DESCRIPTION FOR SAFEGUARDING PERSONALLY IDENTIFIABLE AND CONFIDENTIAL INFORMATION**

In accordance with TEGL 39-11 individuals applying for the Workforce Innovation and Opportunity Act or other funded services must be provided an opportunity to submit written authorization allowing the service provider to share their personal and confidential information and records.

The Montgomery County Workforce Development Board (WDB) and WorkSource Montgomery (WSM) are committed to ensuring client confidentiality and appropriate handling of sensitive information. The purpose of board policy 2016-05 is to specify the requirements for the use, storage, and security of sensitive and confidential information as outlined within said policy.

Each individual must also be informed that he/she can request his/her personal and confidential information not be shared among the partner agencies of the workforce system and that this request does not affect their eligibility for services. If an individual declines to share his/her personal

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and confidential information and is eligible for and receives services, the Board will work with the State to identify a pseudonym to document the participant’s program services.

The WDB is committed to protecting the privacy of both job seekers and employers through secure handling of personally identifiable and confidential information in compliance with TEGL 39-11. All staff and AJC partner representatives are required to take aggressive measures to mitigate the risks associated with the collection, storage, and dissemination of sensitive data including personally identifiable information (PII) as outlined in the policy.

The WDB and contractors will maintain confidentiality and not disclose information about an individual to an employer or partnering organization, unless the job seeker has requested the disclosure on his/her behalf. Both staff and customers sign confidentiality agreements, and customers are informed of their rights and protection of information. Specific measures are taken to further secure medical and disability records, as well as social security numbers. Procedures and policies are in place and updated regularly to secure customer information electronically and in the Montgomery County Job Centers.

**DESCRIPTION OF PROCUREMENT SYSTEM**

The WDB assures that all procedures will comply with WIOA and WIOA Final Rules, as well as State of Maryland and Montgomery County standards. WSM has a procurement process developed by the WDB for expenditures that adheres to the most stringent funding standards for procurements. In addition, WDB has a policy in place for vendor procurement guidelines.

WSM is in compliance with the 29CFR Part 95, Part 97 and 2 CFR 200.

1. As a non-profit 501(c) organization, WSM has established procurement regulations that meet the requirements of Montgomery County and all Federal requirements delineated below. These regulations have been reviewed by WSM’s attorney and approved by the WSM Corporate Board of Directors.
2. WSM Procurements will comply with WIOA and WIOA Final Rules as well as standards established by the State. Property contracts will

adhere to Property Management Procedures taken from the Office of Management and Budget, OMB Circular 2 CFR 200 Uniform Administrative Guidance. Major service providers, as identified in the federal procurement guidance will be selected by utilizing the Competitive Bid or Request for Proposal formats. Selection of all service providers will be based on the vendor’s ability to demonstrate prior effectiveness in the performance standard goals; provide fiscal accountability and cost effectiveness; and serve the targeted population. Proper consideration shall be given to the community-based organizations based on cost, quality of training, characteristics of participants, and meeting performance goals.

3. Sole-source contract may be necessary for services not available by multiple vendors or by vendor ability/knowledge to perform necessary service. Sole-source procurements will be justified in accordance with the criteria in the Uniform Guidance
4. Duplication of services or facilities available from federal, state, or local funds will not occur unless it can be demonstrated that alternative services or facilities are more effective or contribute to the achievement of the Montgomery County Workforce Development Area’s goals.
5. Local Education Agencies will be given the opportunity to provide services unless it is demonstrated that alternative agencies would have a greater potential to enhance the participant’s occupational and career growth.
6. WSM will not fund any skills training unless the level of skills provided in the program is in accordance with any guidelines which may have been established by the Board.
7. WSM and the Board agree to adhere to a code of conduct and procedures to avoid conflict of interest, or the appearance of such conflict, in the exercise of their responsibilities, particularly those relating to the awarding of contracts. All members of the Board and the WSM Corporate Board of Directors must sign a Conflict of Interest Statement as a condition of their continued membership. The standards governing the conduct and performance of members of the Board (as noted on its by-laws), its officers and staff, WSM members and authorized agents who are engaged in

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the procurement of goods and services using federal funds. Except as otherwise permitted or provided by federal, state, or local laws, rules, and regulations, the following provisions shall apply:

8. The Board members, WSM, the Board members or employees will not be permitted to participate in the selection or award of a contract supported by federal or state funds if there is an apparent conflict of interest.
9. The Board members or employees will not be permitted to solicit or accept gratuities, favors, or anything of monetary value from contractors, potential contractors, or parties to any agreement, or to accept gratuities, favors, or anything of a monetary value from contributors, etc.
10. The Board members, or employees will not be permitted to use any knowledge gained through their position for personal profit or the profit of family or associates.
11. Conflict of interest standards cover Board members, employees who are involved on the procurement process in which their relationship to the award recipient could be categorized as:
  - The member, officer, employee or authorized agent;
  - Any member of his/her immediate family;
  - His/her business partner;
  - Any organization which he/she belongs to or that employs any of the above, or has a financial interest in the firm being considered for an award.

These internal regulations define the levels of procurement and the different requirements of competition for each level.

The procurement process is as follows and will be outlined in the procurement policy (see Attachment 2 for policy development timeline):

For large procurements, RFPs are developed, widely issued, advertised when necessary, proposer conferences are held, proposals are rated and ranked based on established, know criteria and the best proposer is objectively selected;

- For more routine purchases, needs are identified by initiative director/authorized staff;
- The level of approval and requirements for

competition as defined by procurement regulations are assessed by the initiative director;

- Criteria in the procurement regulations are applied and when necessary, competing prices are determined via catalog, internet, or telephone as appropriate; at least three prices for equivalent items are entered on the form designed for this purpose including the recommended source;
- The initiative director reviews the proposed purchase to determine if the item is a valid program need, if the competitive prices are sufficient and if the recommended source is appropriate; if so, the initiative director will verify that the contractor/vendor is in good standing with the Federal Government and the State; this is done through SAM and SDAT;
- If so, the signed approved fiscal request form and backup documentation is forwarded to the fiscal unit for the order to be placed.
- For routine office supplies, purchases are approved by the initiative director and sent to the fiscal unit to be ordered. Orders are sent directly to the office needing the supplies and a staff member at the office will verify the order was completely received by signing off on the shipping invoice and/or responding to the fiscal unit by e-mail that the order was received and complete.

**PROPERTY MANAGEMENT PROCEDURES**

A procedure for all property management has been developed to adhere with MD Labor standards and regulations set forth in 29 CFR Parts 95 and 97, as well as in 2 CFR 200. Asset management will adhere to Property Management Procedures taken from the Office of Management and Budget, OMB Circular 2 CFR 200 Uniform Administrative Guidance. As part of the property management policy, all equipment and significant assets are tagged and inventories with a biennial review. Equipment that is not working, fully depreciated, and/or no longer needed are disposed of according to federal regulations and removed from inventory. As a practical matter, WSM has not extended any federal funds subject to Property Management Procedures.

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### **CONFLICT OF INTEREST**

A Conflict of Interest policy has been approved by the WDB. As part of the policy, no individual in a decision-making capacity shall engage in any activity, including participation in the selection, award, or administration of a subgrant or contract supported by WIOA funds, if a conflict of interest (real, implied, or apparent) would be involved. All WDB members sign a Conflict of Interest form and attend yearly ethics training. In addition, conflict of interest training materials is posted on the WDB website for easy reference.

### **WIOA ACCOUNTING PROCEDURES (GAAP)**

The fiscal management systems include QuickBooks Online, Bill.com, an online electronic disbursement system, a third-party payroll processing service, supported by Excel for analysis purposes.

Each source of revenue (i.e., grant or award) are accounted for using a specific "Class" assigned in QuickBooks. All costs expended with the source of funds are recorded to the specific assigned Class.

All financial results by Class are compared to approved budgets.

Program expenditures are processed through Bill.com and assigned to specific Classes and accounts within the Chart of Accounts.

All expenditures are routed through the Program Manager of the specific program for approval, review by the Financial Consultants and reviewed and approved by the Executive Director prior to release for payment. Bill.com and QuickBooks are synchronized and updated electronically.

Internal financial reports are prepared monthly not less than quarterly for review by the Executive Director and Board.

The Staff Accountant, Financial Consultant and Executive Director discuss financial matters on a weekly basis to confirm all information is shared.

Capitalized assets are recorded in QuickBooks separately and depreciation is calculated and recorded on a monthly basis.

Cash reimbursement requests are prepared and submitted to MD DOL not less than quarterly, with payment received from MD DOL within 30

days. Outstanding reimbursement requests are monitored on a monthly basis and pursued for payment if outstanding for more than 30 days.

WIOA grants allow requests for advance funds for costs to be incurred within 20 days (e.g., rent and personnel costs) of the request. As a practical matter, WDB does not request funds in advance.

The Financial Consultant and Executive Director monitor the WDB cash resources to confirm adequate resources are available to meet all obligations when they become due.

MWE is registered with both the Maryland Comptroller's Office and the federal System of Award Management and receives Electronic Funds Transfers directly from all state and federal grantors into our main operating bank account as a result.

The majority of cash receipts are received electronically from the remitter. WDB does not accept payments in cash. Cash is disbursed either via Payroll Network, WSM's payroll vendor, for payment of compensation or Bill.com for payment of vendor invoices.

No WIOA cash is kept on hand and stringent procedures are in place to monitor cash.

### **OBLIGATION CONTROL SYSTEM**

Obligations for training and participant costs are tracked and reported by the adult and youth subcontractors. Sub-contract obligations are tracked by internal staff and Job Services who oversees the WIOA contracts. An internal contract tracking document matches expenses to budget for each contractor and is reconciled on a monthly basis.

Other obligations like contracts and sub-grants are requested by the initiative director, prepared in the fiscal office, and signed by the WSM Executive Director. Obligations are controlled using Excel spreadsheets that list each obligation separately and subtotals them by grant and budget line item, while enabling the calculation of month-end accruals. Reports are provided to the Program Manager for review monthly to verify completeness and to identify amounts needing to be de-obligated.



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**ITA PAYMENT SYSTEM**

All ITA's prior to FY22 have been managed by the program provider, most recent DB Grant, including the costs on its monthly invoices approved by the Program Director.

Invoices/bills for the training are sent directly to the fiscal unit, which reviews the document in accordance with the terms of the Individualized Training Account (ITA), the bill is matched to the original ITA to ensure that: the ITA has been signed by both parties; the bill amount does not exceed the ITA amount (by more than 10%); client information is correct; outcome documentation is for the training as listed on the original ITA. Copies of the outcome documentation are sent to the program to be placed in the client file.

**CHART OF ACCOUNTS SYSTEM**

WSM's chart of accounts, supported by a unique Class ID for each source of revenue provides an appropriate amount of detail to produce timely and accurate financial reports to all funders.

The system allows WSM to track funding type, funding amounts, obligations, expenditures, and assets.

The system permits the tracking of program income, stand-in costs, and leveraged funds.

**ACCOUNTS PAYABLE SYSTEM**

WSM uses Bill.com to facilitate electronic accounts payable procedures and ensure timely payments. The online system allows for receipt of invoices, validation, and sharing of information directly with Quickbooks.

A hierarchy of approval levels are passed to the Executive Director approving all payments.

WSM is implementing a Purchase Order system to improve the management of the service(s) performed or materials purchased, The appropriate grant and chart of accounts line is charged according to the budget. The Staff Accountant enters the invoice for review and approval by the program manager, Financial Consultant and Executive Director prior to the initiating payment.

**Check Writing**—WSM rarely writes checks, as the organization tends to utilize an electronic system.

**Credit Card Payments**—WSM has one corporate credit card that is held by the WSM Executive Director It is used for online purchases, registrations and point-of-sale purchases. Documentation includes a receipt and normally, as appropriate, a fiscal request form which states the need for and use of the purchased item or service. After entry into the accounting system a report is printed showing how it was charged to the appropriate grants budget. The total documentation package is approved by the accountant after entry and by the WSM Executive Director at the end of the month when all packages are assembled using the monthly statement as the cover sheet.

**Online Payment**—A majority of transactions are paid electronically. The Bill.com system maintains electronic copies of documentation for each transaction.

**CASH MANAGEMENT**

All WDB funds are held in Eagle Bank in either an operating account for payment of recurring transactions or an interest-bearing money market account with funds not immediately required for operating or program expenditures.

The Executive Director, Director of Administration and Finance, the Staff Accountant and the Financial Consultant have online access to Eagle Bank or managing and monitoring cash resources.

The Executive Director and Director of Administration and Finance are authorized account signers.

The WDB does not hold or accept cash for payment of expenditures.

**STAFF PAYROLL SYSTEM**

Personnel costs are managed and disbursed through Payroll Network, Inc., a third party payroll processor. The system contains payroll data (backed up by employee files) and provides: the calculation of wages, taxes, and leave payments; creation of appropriate reports; and payment and filing of all necessary employer taxes and quarterly reports. All payroll is direct deposited to a financial institution of staff choice. Times of attendance, hours worked and grant/program served are submitted biweekly into the Payroll Network online system. Hours are approved by the supervisor and reviewed by the Staff Accountant for accuracy and completeness.

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### **PARTICIPANTS PAYROLL SYSTEM AND STIPEND PAYMENT SYSTEM**

All participant payroll and stipends under WIOA funding is managed by WDB program operators. WDB reviews participant payroll and stipends in its fiscal monitoring to ensure sound financial processes.

### **WSM STAFF WORKING WITH WIOA FUNDS**

Anthony Featherstone, *WSM Executive Director*  
Nate' Gordon, *Dir. of Administration and Finance*  
Tyrece Boston, *Staff Accountant*  
Harry Thompson, *Financial Consultant*

### **COST POOLS**

All direct program costs are recorded to specific Classes.

Certain Personnel, Occupancy and Indirect Costs are pooled and allocated pursuant to written procedures not less frequently than quarterly.

Program cost pools are allocated not less than quarterly to the WIOA Youth, Adult and Dislocated Worker grant Classes.

The Occupancy and Indirect Cost Pools are allocated based on the relative use by all programs, to the limit of the lesser of the grant approved rate or our Federal approved indirect rate.

WSM does not have a Federal approved rate and uses the 10% de minimis rate allowed by MD Labor.

WDB organizational operations are supplemented through other funding streams and unrestricted funds are utilized for costs not attributable to grants, as outlined in our cost allocation plan.

- **Program Cost Pool**—The operations of the WIOA Youth, Adult and Dislocated Worker grants are closely related and share a number of resources including staff, facilities, equipment, and supplies. In the cases where these costs cannot be easily identified as associated with one or the other grant, they are included in this pool.
- **Occupance and Indirect Cost Pools**—The cost of operating the corporate headquarters, including facilities, certain executive salaries, all fiscal costs and human resources costs are included in this pool and shared as indirect by all programs.

### **DEBT COLLECTION**

WDB functions on a reimbursement basis. All invoices are reviewed prior to payment to confirm allowable costs. Requisitions for reimbursement are prepared not less than quarterly for submission to MD Labor. WDB is permitted to request funds in advance from MD Labor however as a practical matter does not. MD Labor's cycle for funding requisitions is within 30 days. In the event a payment is not received within the 30-day cycle, WDB staff contact the MD Labor fiscal office for resolution.

## 2020-2024 LOCAL PLAN ASSURANCES

### LOCAL PLAN ASSURANCES

The following checklist and signed certification must be included in the submitted Local Plan. Check the following boxes to accept the assurances listed below.

#### LOCAL PLAN ASSURANCES CHECKLIST

Assurances	
<input checked="" type="checkbox"/>	1. Consistent with WIOA Section 108(d), for the 2020-2024 Plan, the Local Board has held at least one public comment period of no less than 30 days to obtain input into the development of the Local Plan and to provide the opportunity for comment by representative of business, labor organizations, education, other key stakeholders, and the general public.
<input checked="" type="checkbox"/>	2. The final Local Plan is available and accessible to the general public.
<input checked="" type="checkbox"/>	3. The Local Board has established procedures to ensure public access (including people with disabilities) to board meetings and information regarding board activities, such as board membership and minutes.
<input checked="" type="checkbox"/>	4. The Local Board makes publicly-available any local requirements for the Local Area, such as policies, including policies for the use of WIOA Title I funds.
<input checked="" type="checkbox"/>	5. The Local Board has established a written policy or procedure that identifies circumstances that might present conflict of interest for any local workforce investment board or entity that they represent, and provides for the resolution of conflicts.
<input checked="" type="checkbox"/>	6. The Local Board has copies of memoranda of understanding between the Local Board and each American Job Center partner concerning the operation of the American Job Center delivery system in the Local Area, and has provided the State with the latest versions of its memoranda of understanding.
<input checked="" type="checkbox"/>	7. The Local Board has written policy or procedures that ensure American Job Center operator agreements are reviewed and updated no less than once every three years.
<input checked="" type="checkbox"/>	8. The Local Board has procurement policies and procedures for selecting One-Stop operators, awarding contracts under WIOA Title I Adult and Dislocated Worker funding provisions, and awarding contracts for Youth service provision under WIOA Title I in accordance with applicable state and local laws, rules, and regulations, provided no conflict exists with WIOA.
<input checked="" type="checkbox"/>	9. The Local Board has procedures for identifying and determining the eligibility of training providers and their programs to receive WIOA Title I individual training accounts.
<input checked="" type="checkbox"/>	10. The Local Board has written procedures for resolving grievances and complaints alleging violations of WIOA Title I regulations, grants, or other agreements under WIOA and written policies or procedures for assisting customers who express interest in filing complaints at any point of service, including, at a minimum, a requirement that all partners can identify appropriate staff contacts and refer customers to those contacts.
<input checked="" type="checkbox"/>	11. The Local Board has established at least one comprehensive, full-service American Job Center and has a written process for the local Chief Elected Official and Local Board to determine that the center conforms to the definition therein.
<input checked="" type="checkbox"/>	12. All partners in the local workforce and education system described in this plan ensure the physical, programmatic and communications accessibility of facilities, programs, services, technology and materials in the Local Area's American Job Centers for individuals with disabilities.
<input checked="" type="checkbox"/>	13. The Local Board ensures that outreach is provided to populations and sub-populations who can benefit from American Job Center services.

2020-2024 LOCAL PLAN ASSURANCES

- 14. The Local Board implements universal access to programs and activities to individuals through reasonable recruitment targeting, outreach efforts, assessments, service delivery, partner development, and numeric goals.
- 15. The Local Board complies with the nondiscrimination provisions of Section 188, and assures that Methods of Administration were developed and implemented.
- 16. The Local Board collects and maintains data necessary to show compliance with nondiscrimination provisions of Section 188 of WIOA.
- 17. The Local Board complies with restrictions governing the use of federal funds for political activities, the use of the American Job Center environment for political activities, and the Local Board complies with the applicable certification and disclosure requirements.
- 18. The Local Board ensures that American Job Center staff, along with the Migrant and Seasonal Farmworker program partner agency, will continue to provide services to agricultural employers and Migrant and Seasonal Farmworkers that are demand-driven and consistent with MD Labor policy.
- 19. The Local Board follows confidentiality requirements for wage and education records including, but not limited to, 20 C. F. R. 603, the Family Educational Rights and Privacy Act of 1974 (FERPA), as amended, WIOA, and applicable State laws, Departmental regulations and policies.
- 20. The Local Board has a written policy and procedures to competitively award grants and contracts for WIOA Title I activities (or applicable federal waiver), including a process to be used to procure training services made as exceptions to the Individual Training Account process.
- 21. The Local Board has accounting systems that follow current Generally Accepted Accounting Principles (GAAP) and written fiscal-controls and fund-accounting procedures and ensures such procedures are followed to insure proper disbursement and accounting of WIOA adult, dislocated worker, and youth program and the Wagner-Peyser Act funds.
- 22. The Local Board ensures compliance with the uniform administrative requirements under WIOA through annual, on-site monitoring of each local sub-recipient.
- 23. The Local Board has a written debt collection policy and procedures that conforms with state and federal requirements and a process for maintaining a permanent record of all debt collection cases that supports the decisions made and documents the actions taken with respect to debt collection, restoration, or other debt resolution activities.
- 24. The Local Board has a written policy and procedures for ensuring management and inventory of all properties obtained using WIOA funds, including property purchased with JTPA or WIA funds and transferred to WIOA, and that comply with WIOA, and, in the cases of local government, Local Government Property Acquisition policies.
- 25. The Local Board will not use funds received under WIOA to assist, promote, or deter union organizing.
- 26. The Local Board has a written policy and procedures that ensure adequate and correct determinations of eligibility for WIOA-funded basic career services and qualifications for enrollment of adults, dislocated workers, and youth in WIOA-funded individualized career services and training services, consistent with state policy on eligibility and priority of service.
- 27. The Local Board has a written policy and procedures for awarding Individual Training Accounts to eligible adults, dislocated workers, and youth receiving WIOA Title I training services, including dollar and/or duration limit(s), limits on the number of times an individual may modify an ITA, and how ITAs will be obligated and authorized.
- 28. The Local Board has a written policy and procedures that establish internal controls, documentation requirements, and leveraging and coordination of other community resources when providing supportive services and, as applicable, needs-related payments to eligible adult, dislocated workers, and youth enrolled in WIOA Title I programs.

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- 29. The Local Board has a written policy for priority of service at its American Job Centers and, as applicable, affiliate sites and for local workforce providers that ensures veterans and eligible spouses are identified at the point of entry, made aware of their entitlement to priority of service, and provided information on the array of employment, training and placement services and eligibility requirements for those programs or services.
- 30. The Local Board has developed plans and strategies for maximizing coordination of services provided by the State employment service under the Wagner-Peyser Act (29 U.S.C. 49 et seq.) and services provided in the Local Area through the American Job Center delivery system, to improve service delivery and avoid duplication of services.
- 31. The Local Board will provide reasonable accommodation to qualified individuals with disabilities unless providing the accommodation would cause undue hardship.

The Local Workforce Development Board for Montgomery County, Maryland certifies that it complies with all required components and assurances of the Workforce Innovation and Opportunity Act plan development guidelines issued by the state of Maryland. The Local Board also assures that funds will be spent in accordance with the Workforce Innovation and Opportunity Act, Wagner-Peyser Act, and their regulations, written U.S. Department of Labor guidance implementing these laws, Office of Management and Budget circulars, and all other applicable federal and state laws, regulations, and policies.



Local Chief Elected Official

1/25/2022

Date



Local Workforce Development Board Chair

**Mark W Drury**

01/11/2022

Date





[worksourcemontgomery.com](http://worksourcemontgomery.com)