



**Montgomery County Workforce Investment Board  
Minutes  
November 17, 2010  
Shady Grove Innovation Center**

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Board Members in Attendance: Patrick Baker, Stephen Cain, Dennis Fallen, Filip Feller, David Gamse, Kate Garvey, Lori Golino, Elwood Gray, Susan Heltemes, Mary Lang, Susan Leggett-Johnson, Sharan London, Deborah Murphy, Sandra Navidi, David Rodich, Ted Rose, Jerry Shapiro, Carrie Shelton, Eugene Spencer, Michael J. Sullivan, Jr., Dawn Weglein

Guests in Attendance: Gerald Aldridge, Douglas Prophter, Barbara Ebel

Staff in Attendance: Barbara Kaufmann, Freadie Frost

Board members not in attendance: Anthony Cancelosi, Mark Federici, Elyse Kaplan, Sheila Khatri, Stephen Kornblatt, Kathryn Mannes, Steve Silverman, Reginald Stewart

Chair Lori Golino called the meeting to order at 8:00 am. She welcomed the following new members to the WIB, Filip Feller and David Gamse. Lori recognized the mentors, Michael Sullivan and Jerry Shapiro, for the new members and asked the mentors to introduce them.

The Chair explained that Sharan London would be leaving her position with Montgomery County Coalition for the Homeless and we will be talking with her about how the change will affect her position on the Board. Chair Golino asked for approval of the committee reports. Committee reports were approved.

Golino called on Secretary Susan Leggett-Johnson to present the minutes of the September 29, 2010 and June 23, 2010 WIB meetings. A motion to approve the minutes were made, seconded and approved.

Golino moved on to discuss the election of new officers for the positions of the Chair, Vice-Chair, and Secretary, which are two-year terms. A motion to keep the current officers – Lori Golino as chair, Elyse Kaplan as vice-chair, and Susan Leggett-Johnson was made, seconded and approved.

Golino called on Barbara Kaufmann to discuss the 2011 Calendar of Meetings. Barbara mentioned that it was a challenge to find meeting dates that works for everyone, however, there was only one date, April 18 that needed to be changed from Monday to Wednesday,

April 13, 2011. Barbara also mentioned that after confirming the dates with the Shady Grove Innovation Center the 2011 Calendar of meetings would be posted to the website.

Susan Heltemes thanked Elyse Kaplan for hosting a gathering in her home.

Chair Golino introduced Gerald Aldridge, Business Service Team Leader with MontgomeryWorks. Aldridge discussed how MontgomeryWorks work with businesses and jobseekers. The Business Services Team uses a sector approach. They focus on sectors, so that a business representative can become familiar with all the players in their sector and address their needs and develop relationships to leverage those relationships when people come in.

He showed an analysis of job listings on Maryland Workforce Exchange (MWE) that showed posting up 57% from last year. In the month of September, MontgomeryWorks posted 536 openings that range from Nanny to an Attorney to a Geo Specialist Analyst. In addition to helping obtain job listings for MWE, the Business Services Team conducts job fairs, recruitments and employer forums. Aldridge mentioned that MontgomeryWorks is trying to participate in job fairs that are different from traditional job fairs because when MontgomeryWorks focuses on a specific discipline the rewards are greater.

Aldridge also discussed "Rapid Response," which is when an employer is laying off workers. When a layoff happens, the company has to file a WARN notice with the Department of Labor, Licensing and Regulation (DLLR). Aldridge used a small biotech company in Bethesda as an example. The company decided to end a product line of research so about twelve people that were laid off. MontgomeryWorks and DLLR visited with the employees as a team to explain unemployment insurance, workforce services available at MontgomeryWorks or other one-stop centers, workshops offered at MontgomeryWorks that may help them and even training grants that might be available to them if they qualify. MontgomeryWorks brought in four biotech companies that needed the skills of the laid off workers so that the workers could interview with the companies immediately.

Another example of a Rapid Response was at the Holiday Inn, Chevy Chase. They were undergoing renovations and were laying off 70 people. Of the 70 people, 50 were not proficient in English. It took two sessions to bring all of them in and MontgomeryWorks needed to use its own interpreters to assist matching the job seeker to other employers. A week later, MontgomeryWorks assisted two hotels and a hospital, who needed food service people. MontgomeryWorks arranged for the hotels and hospitals to fill their needs from the Holiday Inn laid off employees.

Maryland Business Works (MBW) is a program utilizing federal funds that goes to the State and it is distributed to the various workforce areas. Most of the MBW grants go to small companies and they do not use MontgomeryWorks for hiring because they are small so they hire within their circle. MontgomeryWorks recently submitted a training grant to Adventist Healthcare for special nurses training, which was a rare request from a large organization. One other group is Washington Area New Automobile Dealers that has an innovative system, where they work with Montgomery College and

MontgomeryWorks, which put together a training program that works for all of the dealers. The company pays Montgomery College \$1,000 toward tuition for students hired into the program and the students learn a trade about how to work on automobiles.

Optimize Move is a small business that provides training to jobseekers. Optimize applied for and received several training grants and was able to travel to California to attend a session where many contacts were made which allowed Optimize to present to a group and network with more businesses even some in China. Therefore, the program does work.

#### Discussion and Questions on Business Services Presentation:

Referring to some of the handouts, the number for government contractors served seemed low. They may be counted elsewhere.

What services do nonprofits receive and are we using language that makes them understand they are eligible for the services? Yes, they are eligible.

Can we make contractors of correctional facilities hire ex-offenders?

Response to the customer focus groups in the strategic plan implementation

Deborah Murphy mentioned when she participated in job fairs that she looked for specific type of skills in the construction industry. She explained that the thing that overwhelmed her was how many jobseekers with language barriers try to get into these positions. Even though they have the work skills that we are recruiting for, there is still a level of difficulty because of the language barriers.

#### Strategic Plan Implementation:

Barbara Kaufmann and Pat Baker brought the WIB up-to-date on the request to the State for assistance. The WIB decided to form a subcommittee to work on implementation. Those volunteering included: Weglein, Fallen, Shelton, Rose, Lang, Murphy, Heltemes, and Cain.

Presentation of the revised MBW and Priority of Services to Veterans were presented and approved. (See attached).

Meeting was adjourned at 10 am.



**Montgomery County Division of Workforce Services  
Policy Memorandum #01-11  
Maryland Business Works (MBW) Policy  
November 17, 2010**

**Date: November 17, 2010**  
**Policy: # 01-FY11**

**Purpose:** To provide MontgomeryWorks WIA staff with policy and procedures for the provision of Maryland Business Works.

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**I. REFERENCES:**

Workforce Investment Field Instructions #14-08  
Workforce Investment Field Instruction #10-09, Changes 1 and 2  
Workforce Investment Field Instructions #3-03, Changes 1 through 6

**II. BACKGROUND:**

MBW is a Maryland program to support existing Maryland businesses in the retention and growth of their workforce. The program is for training incumbent workers. MBW projects are employer-based, targeted at specific demand occupations, and require a dollar-for-dollar match from the employer.

**III. ACTION:**

On behalf of the Montgomery County local workforce investment area, MontgomeryWorks Business Services Team Leader may submit MBW applications to the State of Maryland using the following criteria and process.

**A. Eligibility Criteria**

1. Maryland companies that operate under the provision of Maryland law.
2. For-profit and non-profit private sector employers.

**B. Priority Focus Areas.**

1. Businesses with 50 employees or less and/or other industries listed in item 4 below.
2. Preference will be given to projects directed at employees on the lower end of the wage spectrum. The proposed trainee's wage should not exceed \$80,000 per year with the following exceptions:
  - a. If the majority of the employees involved in training are making less than \$80,000 per year, and are involved in the same training, a limited number

- b. A small company is expanding and can document training will result in significant expansion and/or jobs creation.
- 3. Montgomery County priority includes Adult Education; English as a Second Language; and/or any training that leads to the worker's acquisition of transferable skills or an industry-recognized certification or credential.
- 4. Industry Priorities include:
  - a. Health care
  - b. Manufacturing
  - c. Aerospace
  - d. Bioscience
  - e. Construction
  - f. Education
  - g. Finance/Insurance
  - h. Hospitality & Tourism
  - i. Information Technology
  - j. Transportation & Warehousing
  - k. Retail
  - l. Professional/Business Service
  - m. Administrative Services
  - n. Any Green Industry/Occupation

#### C. Training Requirements

- 1. Training provided must:
  - a. Increase the occupational skills level of existing workers;
  - b. Be specific to the job of the worker; and
  - c. Relate to the strategic goals and objectives of the company.
- 2. Needs and costs must be reasonable and clearly related to the project as described in the training plan.

#### D. Allowable Training Costs

Classroom-based training, including training that is designed to meet the specific requirements of a business; college courses that are specific to the individual's job duties are allowable but must not exceed (in total) six months in duration.

In-house staff training.

Instruction provided by consultants.

Books and training materials.

Initial proficiency testing (for approved curriculum).

#### E. Disallowed Costs and Limitations

- 1. Maryland Business Works' funds may not be used for introductory classes, safety, first aid, or leadership skills.
- 2. Cost of books and training materials may not exceed the actual training cost.
- 3. In-house staff training salary may not exceed \$50 /hour.
- 4. Awards for Sales & Marketing may not exceed \$500.

5. “Soft” training required on an annual basis for recertification will not be approved (i.e. CPR training in hospitals).
6. Conferences and seminars will be capped at 25% or \$300 maximum – (whichever is lower).
7. DLLR has established a \$4,500 funding cap level that may be awarded to a specific trainee for a project or series of projects during the program year. In extenuating circumstances, the MBW review team will consider training proposals that exceed the \$4,500 level but strong documentation must be provided by the local area to support such a request.
8. An employer may receive up to \$50,000 in funding when there is job creation and wage increases as a direct result of MBW funding. Otherwise, employers’ annual cap is set at \$30,000.

#### F. Grant application process

1. At least three weeks before training begins, businesses are to request, complete and submit the Maryland Business Works Application to MontgomeryWorks.
2. Completed applications will then be sent to the Maryland Business Works approval panel at the Maryland Department of Labor, Licensing, and Regulation. If approved, MontgomeryWorks Business Services Representative will send the necessary documentation to business to receive the reimbursement.
3. Once the training is complete, the documentation must be completed and returned to MontgomeryWorks Business Services Representative within 60 days.
4. Documentation includes proof of successful completion of the approved training, proof of payment by the employer for approved training, a request for reimbursement on company letterhead and a completed customer survey.
5. MontgomeryWorks will contact businesses who do not submit documentation within 60 days and inform them if the documentation is not received within 30 days, the business will no longer be eligible for reimbursement.

#### G. Reporting Requirements

1. MontgomeryWorks is required to track and report the following information regarding trainees and training activities:
  - a. Names and SS#’s of trainees, last 4 digits only are acceptable;
  - b. Type(s) of training programs/courses taken by each individual;
  - c. Training completion information for each individual including the acquisition of a recognized certification, credential and/or other positive outcomes such as promotion/wage increase information);
 If applicable as part of the business training plan, the LWIA shall document and report the following outcome information:
  - d. Number of trainees receiving job promotions;
  - e. Number of trainees retaining jobs as a result of training program;
  - f. Pre-wage and post-wage information by individual;
  - g. Other jobs created as a result of training program; and
  - h. Other economic benefits of the training program.

H. Exceptions

1. Any exceptions to the above are to be approved by the director of the local workforce investment area.
2. Changes to cost limitations due to reduced grant allocation can be implemented without WIB approval of the changes.

**IV. IMPLEMENTATION:**

Ongoing

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Barbara Kaufmann

Date

Montgomery County Department of Economic Development, Division of Workforce Services



**November 12, 2010**

TO: Members of the Montgomery County Workforce Investment Board

FM: Barbara Kaufmann, Montgomery County Division of Workforce services

**Background**

On November 7, 2002, the Jobs for Veterans Act (JVA), Public Law (P. L.) 107-288 were signed into law. One provision of the JVA, codified at 38 U.S.C.4215, establishes a priority of service requirement for covered persons (i.e., veterans and eligible spouses, including widows and widowers, as defined by this statute) in qualified job training programs.

While recipients of DOL funds for qualified job training programs such as Montgomery County have been required to provide priority of service since 2002, the Maryland Department of Labor, Licensing and Regulation has asked local workforce areas to develop a Veterans Priority of Service policy with applicable procedures that is consistent with the requirements of recent notices from the US Department of Labor. In reviewing the existing procedures with Veterans Service Staff located at MontgomeryWorks and other staff, the current policy was reviewed and is being strengthened and brought to the WIB for approval.

**Previous policy**

“Preference is given to Veterans per the Veterans’ Priority Provisions of the “Jobs for Veterans Act” (PL 107-288). Veterans and eligible spouses will always have priority of service on a “first come, first served” basis for all Individual Training Accounts (ITAs) in Montgomery County until ITA funding is expended in any program year.”

**Proposed policy**

“Preference is given to Veterans per the Veterans’ Priority Provisions of the “Jobs for Veterans Act” (PL 107-288). Veterans and eligible spouses will always have priority of service on a “first come, first served” basis in the following ways.

- Veterans and eligible spouses will have first access to information and registration of workshops provided at MontgomeryWorks
- Veterans and eligible spouses will be referred by the Veterans representatives to the Intensive Services Unit and be assigned an ISU counselor promptly.
- Veterans and eligible spouses will have priority of service on a “first come, first served” basis for all ITAs in Montgomery County until ITA funding is expended in any program year.

- Veterans and eligible spouses cannot be required to exhaust their benefits prior to gaining access to WIA training”

Also attached is the plan submitted to the Department of Labor, Licensing, and Regulation, which provides further detail on definitions of veterans and eligible spouses and how the services will be implemented at MontgomeryWorks.

**MONTGOMERY COUNTY VETERANS PRIORITY OF SERVICE POLICY  
AND PLAN  
November, 2010**

**Montgomery County has adopted the following policy**

“Preference is given to Veterans per the Veterans’ Priority Provisions of the “Jobs for Veterans Act” (PL 107-288). Veterans and eligible spouses will always have priority of service on a “first come, first served” basis for all Individual Training Accounts (ITAs) in Montgomery County until ITA funding is expended in any program year.”

The Workforce Investment Board will re-commit to the priority of service and approve an updated policy at its November 17, 2010 meeting which states:

“Preference is given to Veterans per the Veterans’ Priority Provisions of the “Jobs for Veterans Act” (PL 107-288). Veterans and eligible spouses will always have priority of service on a “first come, first served” basis in the following ways:

- Veterans and eligible spouses will have first access to information and registration of workshops provided at MontgomeryWorks
- Veterans and eligible spouses will be referred by the Veterans representatives to the Intensive Services Unit and be assigned an ISU counselor promptly.
- Veterans and eligible spouses will have priority of service on a “first come, first served” basis for all ITAs in Montgomery County until ITA funding is expended in any program year.
- Veterans and eligible spouses cannot be required to exhaust their benefits prior to gaining access to WIA training”

Veterans and eligible spouses are made aware of priority of service entitlement through:

- TAP/DTAP training sessions
- When receiving “staff assisted services”
- Signage posted in the One-Stop Centers
- Workshops/orientations
- Handouts/fliers, fact sheets and presentations by One-Stop staff
- From LVER and Business Services Team representatives when conducting employer contacts
- DLLR’s website
- MontgomeryWorks Website
- Montgomery County Commission on Veterans

Veterans Service is to prepare a statement that will be placed on the website and publications. The statement will be placed on publications as they are re-printed.

Signage announcing the Priority of Service for Veterans and eligible spouses will be prominently displayed throughout MontgomeryWorks. This signage will include a statement requesting military spouses to contact a Veterans Representative to determine their eligibility for Priority of Service.

**Eligibility for Priority of Service.** Veterans and eligible spouses, including widows and widowers as defined in the statute and regulations, are eligible for priority of service. For the purposes of implementing priority of service, program operators use the broad definition of veteran found in 38 U.S.C. 101(2). Under this definition, the term “veteran” means a person who served at least one day in the active military, naval, or air service, and who was discharged or released under conditions other than dishonorable, as specified in 38 U.S.C. 101(2). Active service includes full-time Federal service in the National Guard or a Reserve component. This definition of “active service” does not include full-time duty performed strictly for training purposes (i.e., that which often is referred to as “weekend” or “annual” training), nor does it include full-time active duty performed by National Guard personnel who are mobilized by State rather than Federal authorities (State mobilizations usually occur in response to events such as natural disasters). “Eligible spouse” as defined at section 2(a) of the JVA (38 U.S.C. 4215[a]) means the spouse of any of the following:

- a. Any veteran who died of a service-connected disability;
- b. Any member of the Armed Forces serving on active duty who, at the time of application for the priority, is listed in one or more of the following categories and has been so listed for a total of more than 90 days:
  - i. Missing in action;
  - ii. Captured in the line of duty by a hostile force; or
  - iii. Forcibly detained or interned in the line of duty by a foreign government or power;
- c. Any veteran who has a total disability resulting from a service-connected disability, as evaluated by the Department of Veterans Affairs; or
- d. Any veteran who died while a disability was in existence. A spouse whose eligibility is derived from a living veteran or service member (i.e., categories b. or c. above) would lose his or her eligibility if the veteran or service member were to lose the status that is the basis for the eligibility (e.g. if a veteran with a total service-connected disability were to receive a revised disability rating at a lower level). Similarly, for a spouse whose eligibility is derived from a living veteran or service member, that eligibility would be lost upon divorce from the veteran or service member.

### **Identification of Veterans**

Individuals accessing MontgomeryWorks for the first time are asked to fill out a registration form. The form asks individuals if they are veterans. Those identifying themselves are referred to the Veteran Services representatives. Those registering/enrolling on MWE by themselves are also encouraged to identify themselves as veterans.

### **Applying Priority of Services**

Programs provided by Montgomery County fall into two basic categories: -universal access programs and programs that require prospective participants to meet specified eligibility criteria.

**Universal access programs.** For workforce programs that operate or deliver services to the public as a whole without targeting specific groups, veterans and eligible spouses, receive priority of service over all other program participants. Universal access programs include use of equipment in the resource room and workshops held.

- For access to the resource room and the equipment, veterans and their eligible spouses, may use the equipment prior to others.
- For workshops, Veterans and their eligible spouses receive notification of class registration dates one day prior to public release

**Programs with Eligibility Criteria.** Programs with eligibility criteria are considered intensive and training services. Veteran or eligible spouse must first meet the eligibility criteria in order to be considered eligible for: a) enrollment in the program; b) receipt of priority for enrollment in the program; and c) priority for receipt of services.

- Veterans and eligible spouses receive assistance from the Veterans representatives who determine if the veteran or eligible spouse meets the eligibility requirements for referral to the Intensive Services Unit (ISU). If the veteran or eligible spouse meets the eligibility requirements, they are immediately referred to ISU without a waiting period.
- Those veterans and eligible spouses being served by the ISU are in the queue for training which is a first come, first served” basis for all ITAs in Montgomery County until ITA funding is expended in any program year.

### **Training of staff and partners**

- Veterans’ staff makes a presentation annually at a MontgomeryWorks staff meeting.
- Veterans’ staff will present to staff of the youth provider.
- Copies of the WIFI, TEGE No. 10-09 and VPL No. 07-09 will be made and distributed to MontgomeryWorks staff. They will be asked to sign that they have received this information.
- Veterans’ staff will train new staff added after the training described above.
- MontgomeryWorks will send a reminder to both its required and non-mandated partners about priority of services with instructions of how to refer individuals to the Veterans Representatives.