

# NIAGARA COUNTY WORKFORCE DEVELOPMENT BOARD

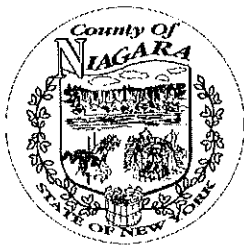
June 2, 2026 at 8:00 a.m.

NC Center for Economic Development, 6311 Inducon Corporate Drive, Sanborn, NY

## AGENDA \*Revised 05/26/26\*

PY25 = Program Year 2025 (7/1/25-6/30/26)

I. Call to Order – Determination of Quorum	8:00	Page Number
<b>II. Old Business</b>		
A. Approve Minutes – 3/3/26 Meeting	VOTE	1-3
B. Approve 04/27/26 Executive Committee Vote: Approve Revised WDB Policy for ITA Adults/DWs – Lowering CDL-A to 160 clock hours – <i>Jerry Cracknell</i>	VOTE	4-9
<b>III. New Business</b>		
A. Approve Appointment of WDB Chair and WDB Vice Chair – <i>Jerry Cracknell</i>	VOTE	
B. Approve revised WDB Supportive Services Policies for both Adult/DW & Youth – add additional case note requirement per new DOL guidelines – <i>Jerry Cracknell</i>	VOTE	10-15
C. Approve revised WDB Policy ITA Adult/DW – adding provision that requires a training provider to have a physical location within the 5 WNY Counties. – <i>Jerry Cracknell</i>	VOTE	20-24
D. Approve RFP Review Committee Recommendation to Select Athena Consulting, LLC as the Vendor for Payroll Services, 1/1/27-12/31/27, in an amount of up to \$1.5 million – <i>Jerry Cracknell</i>	VOTE	16-17
E. Approve PY26 Budget – <i>Joanne Klemer</i> (handout at meeting)	VOTE	handout
F. Blanket Transfer Request, Dislocated Worker (DW) to Adult, per TA17-6: Approve Ability to Transfer up to 100% of PY26 WIOA DW funds to PY26 WIOA Adult Program – <i>Joanne Klemer</i>	VOTE	
G. Blanket Transfer Request, Administration to Adult/DW/Youth, per TA17-6: Approve Ability to Transfer up to 100% of PY26 Administration Funds back to the originating Program Funds for PY26 in all three programs. This amount cannot exceed the original 10% designated to Administration. – <i>Joanne Klemer</i>	VOTE	
<b>IV. Informational Items</b>		
A. WIOA Youth Program Update: 60 Planned Enrollments for PY25 (7/1/25-6/30/26). 26 New Youth Enrollments from 7/1/25 to 5/11/26 with 26 Carry-in Youth. Total Youth Enrollments to Date: 52. – <i>Jerry Cracknell</i>		
B. YEP Youth Program Update: 95 Planned Enrollments (9/1/25-6/30/26). 98 youth in subsidized work experiences as of 5/11/26. 81 youth currently enrolled. – <i>Jerry Cracknell</i>		
C. One-Stop Operator Performance Update – JBM excused – <i>Jerry Cracknell</i>		18-19
D. WDB Innovative Employment Committee Updates – <i>Dennis Martinez</i>		
E. WDB Youth Committee Updates – <i>Lindsay Collins</i>		
F. Announcements by Board Members		
<b>V. Next WDB Meeting: September 8, 2026 at 8 a.m. at NC Center for Economic Development, 6311 Inducon Corporate Drive in Sanborn</b>		
<b>VI. Adjournment</b>		



**NIAGARA COUNTY  
WORKFORCE DEVELOPMENT BOARD**

Joel Feuerman, Chairperson  
Bonnie Rice, Executive Director

Trott Career Center  
1001 Eleventh Street  
Niagara Falls, NY 14301-1201  
Phone: (716) 278-8251  
Fax: (716) 278-8149

**Meeting Minutes – March 3, 2026**

**Niagara County Center for Economic Development/IDA  
6311 Inducon Corporate Drive in Sanborn, NY**

**Members Present:** Jeanne Battaglia, Lindsay Collins, Joel Feuerman, Don Gutillo, Dennis Martinez, Rob Robinson, Jim Scordato, Suzanne Shears, Cathie Synor, Divya Tandon, Michele Taylor, Katie Thompson, Todd Zyra

**Members Excused:** David Haylett, Katie Hurley, John Lang, Michael Martin, David Miller, Bill Robbins, Tom Seaman

**Members Absent:** Nasreen Akhtar, Jim Bittner, William Carroll, John Scherrer, Shawn Williams

**WDB Staff:** Joanne Klemer, Bonnie Rice, Summer Matthews

**Guests/Staff Present:** Jeannine Brown Miller – JBM Consulting, OSSO Provider; Donald Jablonski – Niagara County Employment and Training, Director; Gerald Cracknell – Niagara County Employment and Training; Peter Conte – NYSDOL Fiscal Monitor

**I. Call to Order**

J. Feuerman welcomed all Board Members and guests to the meeting at 8:05 am. He noted that quorum was not established, reaching only 11 out of 13 needed.

- A. J. Feuerman thanked Bonnie Rice for her many years of service and all she has contributed to the Board. A round of applause was given and B. Rice thanked J. Feuerman and the rest of the Board Members.
- B. J. Feuerman welcomed new members: Don Gutillo of Voss Manufacturing Inc., Rob Robinson of ON BOCES, and Katie Hurley of Moley Industries (not present).
- C. J. Feuerman also welcomed Summer Matthews, a new WDB staff member.

J. Feuerman then turned the floor over to B. Rice to lead the meeting. Due to quorum not being met, B. Rice started with the informational items on the agenda first. Quorum was achieved at 8:16 am, before the agenda items requiring a vote were addressed.

**II. Old Business**

Information regarding the below item(s) was distributed to Board members through email prior to the meeting.

- A. **Approve 11/4/25 Meeting Minutes:** B. Rice asked the Board for a motion to approve the November 4, 2025 meeting minutes as presented. Motion made by K. Thompson. Second by L. Collins. All in favor. None opposed. **Motion carried to approve the November 4, 2025 Meeting Minutes.**

**III. New Business**

Information regarding the below item(s) was distributed to Board members through email prior to the meeting.

- A. **Approve JBM HR Consulting as the Vendor for One-Stop System Operator, 7/1/26-6/30/27, in an amount of \$5,000 (Exercising optional year 2 of 4, per contract):** B. Rice asked J. Brown Miller to step out of the meeting. B. Rice shared that JBM HR Consulting has satisfactory performance in the following areas: Has established partnerships between the One-Stop Partner agencies, is timely with reporting requirements, regularly attends WDB meetings, plans, facilitates, and provides meeting minutes for One-Stop Partner meetings on a quarterly basis, provides annual updates to the Partner Referral Guide in a timely manner, and provides quarterly Performance Recommendations. It was also



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2

noted that JBM HR continues to work toward increasing the participation of Partners, involving community members who can benefit from the services we offer, and making connections in the community to work together on mutually beneficial projects. JBM HR has engaged with local businesses and referred them to the One-Stop Career Center for services.

**Approve JBM HR Consulting as the Vendor for One-Stop System Operator, 7/1/26-6/30/27, in an amount of \$5,000 (Exercising optional year 2 of 4, per contract):** Motion made by J. Feuerman. Second by S. Shears. All in favor. None opposed. **Motion carried to approve JBM HR Consulting as the Vendor for One-Stop System Operator, 7/1/26-6/30/27, in an amount of \$5,000 (Exercising optional year 2 of 4, per contract).**

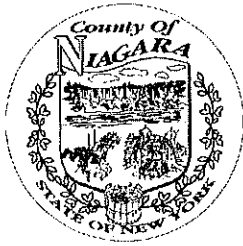
- B. Approve Release of RFP for Payroll Services in an amount of up to \$1.5 million:** J. Feuerman asked B. Rice to explain RFP to the new Board Members. B. Rice gave an explanation on the details of the Request for Proposal. S. Shears asked about the time frame of the contract, if it was one year. B. Rice explained that the contract can be renewed for up to 4 years, but the approvals are in one-year increments. J. Scordato asked who is responsible for the hiring and firing of the youth, if it was the Payroll Services. B. Rice explained the process and that the NCET Youth team is responsible.

**Approve Release of RFP for Payroll Services in an amount of up to \$1.5 million:** Motion made by C. Synor. Second by T. Zyra. All in favor. None opposed. **Motion carried to approve release of RFP for Payroll Services in an amount of up to \$1.5 million**

- C. Approve PY25 Budget Adjustments:** J. Klemer went over pages 4 and 5 of the agenda regarding the budget adjustments. T. Zyra and K. Thompson both had questions regarding the adjustments. J. Klemer reviewed the reallocating of funds for both DWs and Adults. B. Rice gave DW definition. J. Battaglia asked what was increasing for training. B. Rice explained it will increase the participants who will receive funding, moving money from staff time to be able to serve more people with training. Motion made by J. Feuerman. Second by K. Thompson. All in favor. None opposed. **Unanimous vote in favor of the approval of PY25 Budget Adjustments.**
- D. Approve Revised Demand Occupation List – adding Onet codes for Robotics and AI fields (15-1221, 15-1253, 15-1299, and 17-2199):** B. Rice directed the members to pages 6 and 7 of the agenda to review the added Onet codes for Robotics and AI fields. C. Synor asked where these classes were being offered. B. Rice gave explanation of approved training providers. L. Collins asked if other AI classes will be included. B. Rice stated 6 different Onet codes were requested and 4 were approved that were the closest titles related to AI. J. Scordato asked who puts the Demand Occupation List together and approves it. B. Rice gave explanation and explained the New York State Eligible Training Provider List (ETPL). Motion made by J. Battaglia. Second by J. Scordato. All in favor. None opposed. **Unanimous vote in favor of approving the Revised Demand Occupation List – adding Onet codes for Robotics and AI fields (15-1221, 15-1253, 15-1299, and 17-2199).**

**IV. Informational Items**

- A.** B. Rice shared the WIOA Youth Program Update: 60 Planned Enrollments for PY25 (7/1/25-6/30/26). 17 New Youth Enrollments from 7/1/25 to 2/19/26 with 26 Carry-in Youth. Total Youth Enrollments to Date: 43.
- B.** B. Rice shared the YEP Youth Program Update: 100 Planned Enrollments (9/1/25-6/30/26). 95 youth in subsidized work experiences (9/1/25-2/19/26). 83 youth currently enrolled.



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3

- C. B. Rice turned the floor over to J. Brown Miller of JBM HR Consulting, Inc., to provide the Board with the One-Stop Operator Report. J. Brown Miller noted that a copy of the One-Stop Operator Report was provided to Board members in the packet emailed prior to the meeting. She reviewed the information as presented in the report.
- D. B. Rice turned the floor over to D. Martinez, Chair of the WDB Innovative Employment Committee. D. Martinez shared an update on the October 21<sup>st</sup> Career Exploration Fair for high school seniors with disabilities. The fair is designed to connect students with disabilities with hands-on experiences and demonstrations provided by local employers to broaden the students' understanding of careers available in our local area. Participating businesses including NFTA, National Grid, and 914<sup>th</sup> Air Force Explosive Ordnance. D. Martinez recognized partners such as ACCESS VR, Marilyn Patterson - NCET Disability Resource Coordinator, and The Parent Network for their contributions to the success of this event. He made note of how well last year's Fair went and expects the same response this year as the students enjoy the hands-on demonstrations. D. Martinez also invited WDB members to attend the free business workshop hosted by this Committee, to be held March 11 from 8:30am to 10:00am via Zoom. The workshop will discuss methods to support employees through stay-at-work/return-to-work programs.
- E. B. Rice turned the floor over to L. Collins, Chair of the WDB Youth Committee. L. Collins shared that the Youth Committee has continued to discuss how AI (Artificial Intelligence) is going to be incorporated in the workplace. L. Collins discussed a new Teacher Ambassador Program where DOL will pay teachers during the summer months to learn about the local workforce and attend in-person workforce related meetings. L. Collins stated the next Youth Committee meeting will be held on March 12, 2026 at 10:30am via Zoom.
- F. B. Rice opened the floor to Board Members for further announcements:  
S. Shears shared a new grant through NiaCAP called the NYS Affordable Housing Project that will fund home repairs for homeowners in the 12 townships of Niagara County.  
K. Thompson shared a story of meeting with a NYS Insurance Fund representative who was unaware that our Board or any Boards like these existed. She informed him of the role of the Board and connected them with B. Rice. K. Thompson expressed the importance of networking to connect others to the Board and the community.

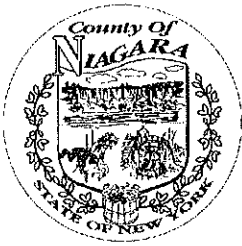
**V. Next WDB Meeting**

B. Rice informed those in attendance that the next WDB Meeting is scheduled for June 2, 2026 at 8:00 a.m. at the Niagara County Center for Economic Development.

**VI. Motion to Adjourn**

B. Rice thanked the members in attendance for their time and requested a motion to adjourn. Motion by K. Thompson. Second by T. Zyra. All in favor. None opposed. **Unanimous vote in favor of adjournment.**  
The WDB Meeting adjourned at 8:43 a.m.

Respectfully submitted,  
Summer Matthews



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4

**Executive Committee**  
**Meeting Minutes – April 27, 2026, 11:00 am**  
**ZOOM Audio/Visual Conference**

**Members Present:** Dennis Martinez, Katie Thompson, Lindsay Collins

**Members Excused:** Suzanne Shears

**WDB Staff:** Bonnie Rice, Summer Matthews

**E&T Staff:** Jerry Cracknell

**I. Call to Order and Meeting Information**

The meeting was organized and led by B. Rice at 11:00 a.m. through the Zoom Audio/Visual conference platform. Attendance outcomes are listed above, quorum was achieved. B. Rice welcomed the Committee members to the meeting and thanked them for their time.

**II. New Business**

- A. B. Rice informed the Committee that there is a need to reduce the number of clock hours for CDL-A training from 200 hours to 160 hours. Two training providers that used to offer CDL-A training have closed. There is a need for additional local providers but other training providers offer 160-hour courses. This has led to the need to reduce the number of clock hours to increase student choice. Motion made by K. Thompson. Second by L. Collins. All in favor. None opposed. **Unanimous approval to reduce CDL-A clock hours from the current 200 hours to 160 hours.**

**III. Motion to adjourn**

B. Rice thanked the Committee members for their time and requested a motion to adjourn the meeting. Motion made by K. Thompson. Second by L. Collins. **Unanimous vote in favor of adjournment.** The Workforce Development Board Executive Committee meeting adjourned at 11:07 a.m. **This item will be moved to the June 2, 2026 WDB Meeting Agenda.**

Respectfully submitted,

Summer Matthews

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5

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**Policy – Issuing Individual Training Accounts (ITAs) for Adults/DWs**

**References:** WIOA Final Rule, §680.200-680.520, TA09-02.1

**Background:** WIOA allows for occupational skills training, including training for nontraditional employment, that meets WIOA requirements. Training services may be made available to employed and unemployed adults and dislocated workers who are determined eligible after an interview, assessment, and career planning. Services will be provided equitably based on the availability of funds.

**Definitions:**

Self sufficiency wage rate: The wage rate established by the Niagara County Workforce Development Board (WDB) to reflect a self-sustaining hourly wage within the local area. WDB established self-sufficiency wage rate is \$30 per hour, as of January 2019. Current self-sufficiency wage rate will be available in the WDB Meeting minutes.

Unemployed: Not working at the time the customer is enrolled in WIOA sponsored classroom training.

Part-time Employment: Working less than 30 hours per week.

Underemployed: Earning less than self-sufficiency wage rate, or working part time and earning less than self-sufficiency wage rate.

Full-time Employment: Working 30 hours per week or more.

Entry level: Employment requiring less than 2 years of experience in the job title.

Local Commuting Area: Within one hour by car, or one and a half hours by public transportation, and located within the United States.

Marketable Skills: Those skills which are in demand in the local labor market, as defined by the NYSDOL labor market long-term projections for the local area and/or inclusion on the local area's CRT Demand Occupation List. Customers who have completed a degree or certificate program, in either an in-demand or non-demand occupation, within the past year are considered to have marketable skills. Customers who have completed a degree or certificate program in a demand occupation at any time are considered to have marketable skills. Customers who are no longer able to work in their demand occupation because of a physical limitation may be considered for funding; the inability to perform the job duties in their demand occupation must be documented with a note from a medical professional.

Upskilling: Additional training to advance in an industry recognized career path in their field of training, such as Certified Nursing Assistant to Licensed Practical Nurse. Training must be in the same career path as current employment. Customer must earn less than the WDB established self-sufficiency wage rate prior to issuance of ITA.

Priority of Service: During times of limited funding, the Niagara County WDB Priority of Service policy will be followed.

Training Cap: The current WIOA CRT training cap is \$5,000 per Adult or Dislocated Worker (DW) student. WIOA funding will be used as funding of last resort. TAP, Pell, Excelsior, or other grants/scholarships will be applied to training costs before WIOA funding will be used. This policy does not apply to TAA/TRA funded training/services.

County Residency: 1. Students who reside in a dormitory or on-campus housing such as an apartment on campus will be considered as Non-County residents. 2. Students who reside off-campus, e.g., in a rental apartment, will be considered as County residents.

**Qualified Training: Demand Occupations and Eligible Training Providers List (ETPL)**

- Customer must be seeking training that is listed on the local area's CRT Demand Occupation List.
- Training course/program must be listed on the ETPL and on the Approved Provider/Training Course list.

- Training must be able to be completed within one year or less of WIOA funded training start date.
- Training which involves fewer than 150 instructional hours that does not lead to NYS Licensing is not deemed to be of sufficient duration to assure significant skill development. Therefore, courses shorter than 150 instructional hours should not be approved without sufficient justification.

6

### **Customer's Responsibilities**

- Initial Requirements: Classroom training (CRT) application is available online at [www.worksource1.com](http://www.worksource1.com). Customer must be: at least 18 years old, not in default status on a student loan (self-attestation), and in need of obtaining marketable skills which can lead to full-time employment (if working, must show an increase in wages). Job search must demonstrate the need for additional training to gain employment. Customer must not have received WIOA classroom training or OJT funding within the past three years. Customer must have the skills and qualifications to participate successfully in training services [§680-210(a)(3)].
- Application Deadlines: Customer must submit a fully completed WIOA CRT application at least three weeks in advance of the training start date. Customer must submit all documentation by the Wednesday prior to training start date. Application is valid for six months and will be retained for six months.
- Marketable Skills: Customers who already possess marketable skills will not be considered for WIOA CRT funding but will be referred to the Career Centers for job search assistance.
- Upskilling: Customer must submit a letter, on employer's letterhead, from current employer stating that the customer will receive at least a \$2 per hour wage increase upon successful training completion. Customer must sign Applicant Statement that they will not receive training funding from any other source, and will not be reimbursed for training costs from another source upon training completion.
- Basic Skills Assessment: Customer must possess the basic academic skills needed to be successful in their chosen training. Basic skills assessment will occur after training application has been submitted. Customers seeking training in Welding or Machinist must pass an approved assessment with a Grade 10 level for both Math and Reading prior to WIOA funding consideration. Customers seeking training in other areas must pass an approved assessment with a Grade 8 level for both Math and Reading prior to WIOA funding consideration. Customers who do not pass the assessment at the required levels will be referred for remediation. Customers must wait 30 days before re-taking the assessment. Assessment scores will remain valid for one year and will be retained for one year. Please refer to WDB Policy for Basic Skills Deficiency for additional information.
- Job Search: If customer is not working full time at the time of enrollment, customer must demonstrate that they have applied for at least 10 jobs in the past 30 days with their current skills. Job search requirement is waived for individuals who are working but are underemployed at the time of enrollment. Job search is also waived for currently enrolled students.
- Wage Increase: Training must lead to an increase in wages, as demonstrated through Labor Market Research or Pre-Hire Letters.
- Labor Market Research: Customer must submit five want ads for the anticipated career field, showing availability of full-time entry-level employment within the local commuting area, and career exploration showing the average rate of pay for this job title. Pay rate must provide an adequate wage leading to self-sufficiency.
- Pre-Hire Letters: For customers who are working at the time of CRT enrollment, customer must document labor market with wage increase or submit a letter on company letterhead from their existing employer, or a pre-hire letter from another employer, stating they will hire the customer at a higher wage upon training completion (letter must include wage rate).
- CDL Training Requirements: For CDL training, two pre-hire letters and a copy of the Motor Vehicle Report (MVR) showing a clean driving record must be submitted for CRT funding consideration. CDL-A training must be a minimum of 160 hours in duration. Individuals with a prior felony conviction must disclose the felony to the training provider and the potential employers to ensure they will be able to gain employment in this career field upon successful training completion.
- Medical Clearance: The customer must have medical clearance to work, with no restrictions, at the time of application. Customers currently receiving Workers' Compensation or customers currently on leave from work due to medical conditions are deemed to be not medically cleared to work. Customer must submit

signed documentation from a medical doctor, either on a prescription pad or on the doctor's letterhead, stating they are able to return to full-time work with no restrictions.

- **Ability to Perform Job Duties:** The customer must be physically able to perform all aspects of the desired training and duties of the job for which WIOA-CRT funding is being sought. Customer must be willing and able to work full time at the time of application.
- **Individuals with Disabilities:** Customers who disclose a disability will need to meet with the Disability Resource Coordinator and to pursue Title IV Funding where appropriate. Customer must submit a Title IV denial letter for WIOA to assist. WIOA-CRT funding must be the funding of last resort.
- **Acceptance Letter:** Customer must provide an acceptance letter from the training institution stating the customer has been accepted into a specific course of study that is certificate/credential bearing. Letter must include anticipated start and end dates of training, name of course of study, all training related costs, and contact information for the training provider. Specific industries/training areas may be designated when funds are limited.
- **Degree Completion:** If a customer is seeking funding for the final year of an approved degree program, customer must provide transcripts, attendance records, and a letter from the training institution stating the customer's expected graduation date. Customer needs to have at least a 90% attendance rate, a 2.0 GPA, and a passing grade on all core courses.
- **Attendance Records:** Customer must provide attendance sheets, signed by customer and instructor, on a weekly basis. If attendance sheets are not received weekly, it may negatively impact funding for transportation allowance and/or funding for future semesters.
- **Employment Upon Training Completion:** Customer must have an immediate goal of full-time employment upon completion of the degree (i.e., no plans to continue on for further education at completion of WIOA training).
- **NCET Career Advisor Assessment Meeting:** Customer must meet with an NCET career advisor for assessment and recommendation for funding prior to WIOA funding consideration. Customer and NCET career advisor will complete an Individual Employment Plan and Comprehensive Assessment, which indicates the training program, dates of instruction, and costs as well as an attestation that prior WIOA-CRT funding has not been used in the past three years. NCET career advisor will determine if additional documentation is required to determine WIOA eligibility based upon individual circumstances.
- **Supportive Services:** Transportation assistance in the form of bus passes or reimbursement for travel to/from training may be funded when all other training related expenses are covered by grants, scholarships, and WIOA funding. Supportive services may not be available if funding is limited. The current Niagara County WDB policy for transportation assistance will be followed. Costs for supportive services will be included on the budget and must remain within the current training cap. Transportation assistance will only be considered for an individual who is not eligible for transportation assistance from any other source.

### **Issuing Individual Training Accounts (ITAs)**

- Customer must have a complete, eligible file including but not limited to documentation of labor market research, job search, review of related skills, and acceptance into approved training institution and course.
- Priority will be given to Niagara County residents. Non-County residents must obtain a letter from their home county stating the home county is unable to fund the customer, using the ITA Denial Letter form (attached).
- Assessment must indicate that the requested training seems appropriate and that the individual possesses the required literacy (results of approved basic skills assessment) and aptitude skills for the desired training program. Career advisor will review current job related skills, resume, and job search using existing skills.
- **Individual Employment Plan and Comprehensive Assessment** will indicate the training program and dates of instruction, and will indicate that WIOA funding has not been used for classroom training or OJT in the past three years.
- **Release Authorizations** will be completed and signed for access to future employment information and to allow access to training institution information for the customer.
- **Budget:** NCET career advisor will establish a budget plan with the customer, listing training related expenses and all sources of financial aid for each semester of training. WIOA-CRT funding must be used

as the funding of last resort. Budget will include all anticipated training related expenses including tuition, fees, books, supplies, and supportive services. WIOA-CRT funding will be budgeted to fund training expenses in the following order of priority: (1) tuition, (2) fees, (3) books, (4) supplies, and (5) supportive services.

- NCET Career Advisor will complete ITA, Budget worksheet, Attendance form, and Bookstore letter (if needed).
- Other paperwork deemed necessary will be completed.
- OSOS entries will be recorded as appropriate.

**Manager Approval / Review**

Customer's case file is then presented to the CRT manager/designee for review and approval. Additional information and/or clarification may be requested at this time by the manager/designee.

*Approved by WDB Executive Committee: 04/27/2026.  
Approved by the WDB Board: xx/xx/xx*

1001 Eleventh Street  
Niagara Falls, New York 14301-1201

*Donald Jablonski, Director*  
(716) 278-8148  
(716) 278-8587 Fax

**ITA Denial Letter**

This form is to be completed by the appropriate staff member  
in the county of residence.

Today's Date: \_\_\_\_\_

Name of Customer Applying for Individual Training Account/Classroom Training:

\_\_\_\_\_

The above named customer states they reside in \_\_\_\_\_ County.

Their county of residence is unable provide WIOA funding for ITA/Classroom Training  
for the following reason(s):

County of residence does not have funding available for WIOA ITAs at this time.

Customer does not meet the local policy requirements for WIOA ITA funding.

Training does not meet the local policy requirements for WIOA ITA funding.

Customer is not eligible for WIOA funding because: \_\_\_\_\_

\_\_\_\_\_

An OSOS Comment has been entered explaining the reason for this denial.

\_\_\_\_\_  
Staff Member's Name (Please Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Phone Number

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**Policy – Supportive Services – Adults and Dislocated Workers**

**References:** WIOA Final Rule, § 680.900, sec, 3(59), 134(d)(2), and sec. 134(d)(3)

**Background:** WIOA states that local WDBs must develop a supportive services policy in consultation with the one-stop partners and other community services that ensures resource and service coordination in the local area.

**Policy:** Supportive services may only be provided to individuals who are participating in Career Center services or WIOA sponsored training and unable to obtain supportive services through other programs providing such services. [Case file documentation is to be required, notating that all other additional non-WIOA funding sources were explored and were unavailable prior to the issuance of WIOA-funded supportive services.] Supportive services may not be available if funding is limited.

Supportive services may include, but are not limited to:

- Linkages to community services
- Transportation assistance – please see page 2.
- Child care and dependent care assistance may be offered based on funding availability and training budget to customers enrolled in WIOA sponsored training or enrolled in a WIOA Youth program.
- Assistance with educational testing
- Reasonable accommodations for individuals with disabilities
- Referrals to legal aid services
- Referrals to health care
- Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear may be offered based on funding availability to customers enrolled in WIOA sponsored training or enrolled in a WIOA Youth program.
- Assistance with books, fees, school supplies, exam fees, and other necessary items for WIOA sponsored training may be offered based on funding availability to customers enrolled in WIOA sponsored training or enrolled in a WIOA Youth program.

**Transportation Assistance**

Transportation assistance may be offered to customers who are regular users of the Career Centers (defined as having a minimum of two or more in-person, Center-based activities within the last 30 days, not counting the date of the request for supportive services), customers who are enrolled in WIOA sponsored training, customers who are enrolled in the WIOA Youth program, or customers enrolled as participants in regional training collaborations under limited grants such as the Trade and Economic Transition National Dislocated Worker Grant (TET-NDWG), as funding permits.

Transportation assistance in the form of bus passes may be funded when all other training related expenses are covered by grants, scholarships, and WIOA funding. Costs for supportive services will be included on the budget and must remain within the current training cap. Transportation assistance will only be considered for an individual who is not eligible for transportation assistance from any other source. For those individuals in WIOA sponsored training who qualify for transportation assistance, Weekly Classroom Training Attendance Sheets signed by both the trainee and the instructor(s) will be used as documentation of training attendance.

Transportation assistance may also be provided to customers enrolled as participants in regional training collaborations under a limited grant such as the Trade and Economic Transition National Dislocated Worker Grant (TET-NDWG). Individuals must be determined to be eligible for program participation based on intake and assessment(s), be actively enrolled in program, and demonstrate a need for Transportation assistance to enable individual to access classroom and off-site training as well as participate in subsidized work experience as part of program completion.

Transportation assistance may also be provided to active Niagara’s WorkSourceOne customers for:

- a) a verified job interview,
- b) a verified pre-employment physical/drug screen requirement, or
- c) to support first 30 days or less of verified employment - intended to carry new employee through to first pay check.

1. Individual must be an active Niagara’s WorkSourceOne customer as verified by recent Career Center job search activities in NYS One Stop customer database. “Active customer” is defined as having a minimum of 2 or more in-person, Center-based activities within the last 30 days, not counting today’s visit.

Customer needs to complete a visitor slip each time they utilize the Career Center.

2. Active customer must be able to verify job interview, pre-employment physical/drug screen, new employment:
  - Verification for Interview can include; copy of customer’s “thank you” letter after interview, an offer of employment resulting from the interview, or a copy of the interviewer’s business card.
  - Pre-employment Drug Screen - customer must verify they have a job offer pending which requires a physical/drug screen, and can then be given 2 – 3 tokens to attend. Verification of physical/drug screen attendance is required for future transportation assistance consideration. A maximum of two (2) instances of this assistance per customer per 12 month period.

- New Employment – if customer secures a new position: an NFTA bus pass can be issued to assist with transportation for the first month on the job but verification of new employment is required.
- Forms of acceptable verification include; printout of e-mail job offer, letter of job offer, letter/e-mail confirmation of start date, fax or phone call from employer or placement agency confirming employment, printout of schedule, name tag (with follow up copy of first pay stub).
- If the new position is through a Temp agency, the assignment must be expected to lead to a permanent position, it cannot be a short-term temp assignment.
- A maximum of two (2) bus passes per customer per 12 month period.

*Approved by the Board: 3/4/25.*

**NIAGARA COUNTY  
WORKFORCE DEVELOPMENT BOARD**

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Niagara Falls, New York 14301-1201

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**Policy –Supportive Services – WIOA Youth**

**References:** WIOA Final Rule, § 680.900, sec. 3(59), 134(d)(2), and sec. 134(d)(3); §680.910; §680.920; §681.570; and TA09-02.1

**Background:** WIOA allows local WDBs to develop a supportive services policy specifically to address the needs of WIOA Youth programs, in consultation with the one-stop partners and other community services, that ensures resource and service coordination in the local area.

**Policy:** This policy covers supportive services that may be provided to WIOA Youth Program enrollees (WIOA Youth). Adults and Dislocated Workers are covered by a separate Supportive Services Policy. Written documentation of the need for supportive services must be filed in the WIOA Youth’s case file. An appropriate OSOS Comment and Service must accompany the provision of supportive services. Because WIOA is the funding of last resort, supportive services will only be provided when other funding sources are not available for this purpose. [Case file documentation is to be required, notating that all other additional non-WIOA funding sources were explored and were unavailable prior to the issuance of WIOA-funded supportive services.] Supportive services may not be available if funding is limited. Services will be provided equitably based on availability of funds.

Supportive services for WIOA Youth may include:

- Linkages to community services
- Assistance with educational testing
- Reasonable accommodations for Youth with disabilities
- Referrals to legal aid services
- Referrals to health care
- Transportation assistance – please see details under the heading “Transportation Assistance”.
- Attire and Tools – please see details under heading “Attire and Tools”.
- Assistance with books, fees, school supplies, exam fees, and other required items for training may be offered to WIOA Youth enrolled in WIOA sponsored training or non-WIOA sponsored training. Costs will not be considered part of the WIOA Youth training budget and are in addition to the WIOA Youth training budget for WIOA approved training related expenses.
- Payments and fees for employment-related and/or training-related applications, tests, and certifications.
- Payments and fees related to obtaining a New York State Learner’s Permit and New York State Driver’s License. Payments and fees related to obtaining a New York State ID card may be covered. An individual WIOA Youth may receive both assistance with the cost of the NYS ID card and the NYS Driver’s License, at the discretion of the career counselor. Decision to fund both a NYS ID and NYS Driver’s License will be made based on participant need as it relates to WIOA, such as when a Youth needs the NYS ID card for employment but later wants to pursue their NYS Driver’s License.
- Interview and note taking supplies such as plain portfolios, folders, pens, and paper may be given if the WIOA Youth has an interview, is in their first week of new subsidized or unsubsidized employment, or is in their first week of college or post-secondary education. All

such supplies must be free of logos or advertising. Youth must sign that they have received these items.

**Transportation Assistance**

Transportation assistance may be offered to WIOA Youth during enrollment and corresponding follow-up period, as funding permits. Transportation assistance must be directly related to training or work needs.

Transportation assistance may be provided in the form of bus passes. Costs for supportive services will not be included on the training budget and are in addition to funding for WIOA approved training. Transportation assistance will only be considered for an individual who is not eligible for transportation assistance from any other source. Youth must sign a statement that they are not receiving or eligible for transportation assistance from any other source. Youth must sign that they have received the bus pass. Each WIOA Youth may not receive more than 3 monthly bus passes. Each WIOA Youth may not receive more than 15 daily bus passes.

Transportation assistance may be provided to WIOA Youth for any of the following reasons:

- a) Travel to/from WIOA-sponsored training, with attendance documented with training attendance sheets.
- b) Travel to/from non-WIOA-sponsored training, with attendance documented with training attendance sheets.
- c) Attendance at GED/TASC classes, with attendance documented in case file (e.g., monthly email from instructor).
- d) Travel to/from the following, if appropriate and needed for employment-related or training-related activities, including: obtaining youth’s Social Security card, obtaining youth’s birth certificate, required pre-training or pre-employment testing, a verified pre-employment physical/drug screen requirement, a verified job interview, initial meetings/orientation with a potential worksite/employer, attending a career fair, attending a college fair, appointment to establish day care if day care will be required for employment or training, obtaining NYS Driver’s License or NYS ID Card, initial mental health appointment, or travel to/from subsidized or unsubsidized employment. Appropriate documentation must be placed in case file.
- e) Subsidized Employment: Transportation assistance, consisting of monthly bus passes, for WIOA Youth during enrollment and corresponding follow-up period, if appropriate and needed for subsidized employment-related travel with attendance documented in case file (e.g., work experience timesheets).
- f) Unsubsidized Employment: Transportation assistance, consisting of monthly bus passes, for WIOA Youth during enrollment and corresponding follow-up period, if appropriate and needed for unsubsidized employment-related travel with attendance documented in case file with paystub from prior month (i.e., May paystub in case file before authorizing June bus pass). If first paystub for new employment is not yet available, a self-attestation including place of employment, employment start date, and dates worked with youth’s signature will serve as case file documentation.

WIOA Youth must verify job interview, pre-employment physical/drug screen, or new employment as follows:

- Interview – verification may include but is not limited to: a copy of customer’s “thank you” letter after interview, an offer of employment resulting from the interview, or a copy of the interviewer’s business card.
- Pre-employment Physical/Drug Screen - verification of physical/drug screen attendance may include an email confirming the appointment, a letter from the employer, or the business card from the physical/drug screen site.
- New Unsubsidized Employment – verification may include a printout of e-mail job offer, letter of job offer, letter/e-mail confirmation of start date, fax or phone call from employer or placement agency confirming employment, printout of work schedule, or WIOA Youth’s employee name tag (with follow up copy of first pay stub).

**Attire and Tools**

Assistance with uniforms or other appropriate work attire and work-related tools and training-related tools, including such items as eyeglasses and protective eye gear, may be offered based on funding availability to WIOA Youth enrolled in WIOA-sponsored training, non-WIOA-sponsored training, or enrolled in a WIOA Youth program. Attire and tools must be directly related to training or work needs. Youth must sign that they have received these items. Purchase of clothing for participants may include but is not limited to the following:

- a) Interview outfit: clothing items needed for interview that are not available in local clothes closets. Items may include top, bottom, belt, tie, shoes, socks, dress, stockings, blazer, etc. Participant is required to provide proof of scheduled interview. Documentation that the Youth applied for 8 jobs per month will be considered justification for the purchase of an interview outfit, where appropriate.
- b) Subsidized work site clothing: clothing to be determined based on work site; may include boots/nonskid shoes/sneakers, pants, shirts, gloves, aprons, and/or safety goggles. Items not listed above may be requested, reviewed, and approved by the WDB Director or their designee.
- c) Unsubsidized employment: clothing to be determined based on employer; may include boots/nonskid shoes/sneakers, pants, shirts/blouses, gloves, aprons, and safety goggles. Items not listed above may be requested, reviewed, and approved by the WDB Director or their designee.
- d) WIOA-sponsored or Non-WIOA-sponsored Training: clothing and tools required for training. Clothing and tools as determined by the course outline or information provided by the training provider.

*Policy will take effect immediately.  
Approved by the WDB Board: 9/9/25.*

**Proposal Review Committee Summary**  
**Payroll Services for Temporary Work Experience Request for Proposals 2027**

- RFP (Request for Proposals) Package posted to BidNet Direct March 10, 2026.
- Bidder's opportunity to ask questions, March 10-17, 2026, responses made by March 24, 2026.
- Proposals due March 31, 2026 and received March 31, 2026.
- Package assembled and distributed to the committee April 1, 2026.
- Committee members reviewed and responded to Reviewer Proposal Checklists by April 13, 2026.
- RFP Review Team meeting conducted by ZOOM on, April 17, 2026.

The Review Team consisted of four members, all of whom were WDB Board members. The RFP was for funds from an estimated award date of January 1, 2027 through December 31, 2027 with the option of three one-year renewals. Reviewers received:

- A copy of every proposal
- Access to the Request for Proposal Package
- Reviewer Proposal Checklist and Comment Sheet for each proposal to be reviewed
- Past Performance of Payroll Services Contractor TES Staffing
- Addendum #1: Bidder questions and answers

A total of four proposals were received. All bidders provided all necessary information and were reviewed.

**Proposals were received from:**

ATHENA  
 BUZZCLAN  
 EVENING STAR  
 TES STAFFING

**Rankings of Proposals**

Reviewers individually scored each of the four proposals that were submitted.

**Review of Proposals**

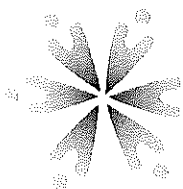
Each Review Committee member used the Reviewer Proposal Checklist to review each individual proposal. The Checklist allowed the reviewer to examine the proposal based service design and description (applicant shows evidence of ability to meet payroll needs, proposal is clear, organized and complete, effective strategy to serve eligible youth participants, realistic delivery model, costs are appropriate for service provided, bidder conveys the means and methods of performing the services, bidder notes how often payroll will be processed (weekly or bi-weekly), provides information on direct deposit and/or print and mail checks for payroll directly, bidder illustrates capacity in which they will communicate with Niagara WDB, etc.), organizational experience and capacity (have the assurances and certifications been addressed, history of providing payroll services, has the fiscal, administrative, and performance management ability to provide the services being proposed, evidence of past performance in a similar role that can be used to evaluate the degree of success – if so, were goals of past programs met, etc.) budget and budget narrative (budget is clear and complete, cost categories seem reasonable and are based on length of services and involvement (time spent on payroll services, hard costs, etc.) and the outcomes, data collection, reporting and monitoring (bidder indicates plan for handling

Confidential Information, has collected performance on similar contracts in the past (numbers served, categories of workers), proposal demonstrates that the bidder understands they will operate as the Employer of Record, proposal demonstrates that the bidder has the ability to provide accurate, detailed invoicing to WBD, proposal provides for collection of information as required by Federal and State mandates, including taxes, and provides the employer's portion of Social Security, Medicare, NYS Unemployment Insurance, Federal Unemployment Insurance (if applicable), and statutory Workers' Compensation and disability insurances), proposal illustrates how bidder will collect timesheets and audit for accuracy, includes how information will be shared with WDB, participant and worksite, etc., as presented by the bidder.

Reviewers independently scored and made comments for each proposal. Prior to the RFP Review Committee meeting, the reviewers' independent review scores and comments were aggregated and presented at the meeting for discussion.

### **Recommendations of Review Committee**

After a review and discussion of each of the four proposals, the committee voted on their recommendation. The committee unanimously recommends fully funding bidder Athena, with WDB staff to contact Athena to discuss services and contract. Athena is a U.S. based entity with prior payroll services experience with Youth and TANF programs. Overall, the Review Committee believes that Athena will meet the objectives of the RFP. The Review Committee also noted that although Athena was not the lowest bidder based on price alone, they felt in comparison to the other bids Athena's proposal provided the most services and benefit to Niagara County Youth and fully reflected the duties outlined in the RFP. The reviewers felt that Athena was the lowest responsible bidder which proposes to meet the expectations defined in the RFP.



## PY25 Q3 Data (1/1/26 - 03/31/26)

### WIOA Youth

- **46 Enrolled** at the end of Q3 – **39 Carry In** (participants from PY25 Q1, Q2 and past), **7 Newly enrolled** in Q3

### CRT (Classroom Training)

- **173 Enrolled** at the end of Q3 – **93 Carry In** (participants from PY25 Q1, Q2 and past)
- **80 Newly enrolled** in Q3; **39** using RETI Grant funds to access clean, green, renewable energy training
- **6 Training Providers**, 11 Courses
- **90** have completed training, **83** are in progress

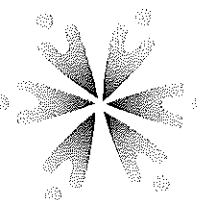
### **Q3 Training Providers and Courses utilized by participants:**

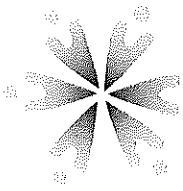
Training Provider	Class
160 Driving Academy	CDL-A
Bryant & Stratton	ON-Certified Phlebotomy/EKG Technician
Greenforce Training, Inc.	Green Energy Manufacturing
NCCC / SUNY Niagara	Chemical Dependency Counseling (Certificate)
NCCC / SUNY Niagara	Radiologic Technology
NCCC / SUNY Niagara	Welding
Orleans Niagara BOCES	Basic/Advanced/Pipe Welding
Orleans Niagara BOCES	Building Trades
Orleans Niagara BOCES	Electricity I
Orleans Niagara BOCES	HVAC
Stevens Driving School	CDL-A

### On the Job Training (OJT)

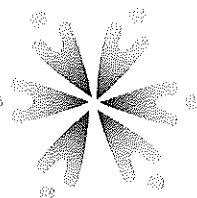
- **25 Enrolled** in WIOA OJTs at the end of Q3 – **16 Carry In** (participants from PY25 Q1, Q2 and past), **9 Newly Enrolled** in Q3
- **8 Companies**, 7 Job Titles
- **14** have completed training successfully, **6** are in progress

### **Q3 Companies and Job Titles for OJT participants:**





Company	Job Title
An-Cor Industrial Plastics	Fiberglass Laminator / Fabricator
Archem America	Production Associate
Buffalo Gear	Industrial Manufacturing Technician
Kohler Machine	Shipping Receiving / Operator
Matrix Imaging Solutions	Insertor Operator
Virtual Polymer Compounds	Fiberglass Laminator/ Fabricator
Vishay Thin Film	Plating Operator
Zimmies Service Inc.	Automotive Service Technician



**NIAGARA COUNTY  
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**Policy – Issuing Individual Training Accounts (ITAs) for Adults/DWs**

**References:** WIOA Final Rule, §680.200-680.520, TA09-02.1

**Background:** WIOA allows for occupational skills training, including training for nontraditional employment, that meets WIOA requirements. Training services may be made available to employed and unemployed adults and dislocated workers who are determined eligible after an interview, assessment, and career planning. Services will be provided equitably based on the availability of funds.

**Definitions:**

Self sufficiency wage rate: The wage rate established by the Niagara County Workforce Development Board (WDB) to reflect a self-sustaining hourly wage within the local area. WDB established self-sufficiency wage rate is \$30 per hour, as of January 2019. Current self-sufficiency wage rate will be available in the WDB Meeting minutes.

Unemployed: Not working at the time the customer is enrolled in WIOA sponsored classroom training.

Part-time Employment: Working less than 30 hours per week.

Underemployed: Earning less than self-sufficiency wage rate, or working part time and earning less than self-sufficiency wage rate.

Full-time Employment: Working 30 hours per week or more.

Entry level: Employment requiring less than 2 years of experience in the job title.

Local Commuting Area: Within one hour by car, or one and a half hours by public transportation, and located within the United States.

Marketable Skills: Those skills which are in demand in the local labor market, as defined by the NYSDOL labor market long-term projections for the local area and/or inclusion on the local area's CRT Demand Occupation List. Customers who have completed a degree or certificate program, in either an in-demand or non-demand occupation, within the past year are considered to have marketable skills. Customers who have completed a degree or certificate program in a demand occupation at any time are considered to have marketable skills. Customers who are no longer able to work in their demand occupation because of a physical limitation may be considered for funding; the inability to perform the job duties in their demand occupation must be documented with a note from a medical professional.

Upskilling: Additional training to advance in an industry recognized career path in their field of training, such as Certified Nursing Assistant to Licensed Practical Nurse. Training must be in the same career path as current employment. Customer must earn less than the WDB established self-sufficiency wage rate prior to issuance of ITA.

Priority of Service: During times of limited funding, the Niagara County WDB Priority of Service policy will be followed.

Training Cap: The current WIOA CRT training cap is \$5,000 per Adult or Dislocated Worker (DW) student. WIOA funding will be used as funding of last resort. TAP, Pell, Excelsior, or other grants/scholarships will be applied to training costs before WIOA funding will be used. This policy does not apply to TAA/TRA funded training/services.

County Residency: 1. Students who reside in a dormitory or on-campus housing such as an apartment on campus will be considered as Non-County residents. 2. Students who reside off-campus, e.g., in a rental apartment, will be considered as County residents.

**Qualified Training: Demand Occupations and Eligible Training Providers List (ETPL)**

- Customer must be seeking training that is listed on the local area's CRT Demand Occupation List.
- Training course/program must be listed on the ETPL and on the Approved Provider/Training Course list.

- Training must be able to be completed within one year or less of WIOA funded training start date.
- Training which involves fewer than 150 instructional hours that does not lead to NYS Licensing is not deemed to be of sufficient duration to assure significant skill development. Therefore, courses shorter than 150 instructional hours should not be approved without sufficient justification.
- Training provider must provide verification of a physical location within the 5 counties of the western New York Region; Niagara Erie, Chautauqua, Cattaraugus and Alleghany.

### **Customer's Responsibilities**

- Initial Requirements: Classroom training (CRT) application is available online at [www.worksource1.com](http://www.worksource1.com). Customer must be: at least 18 years old, not in default status on a student loan (self-attestation), and in need of obtaining marketable skills which can lead to full-time employment (if working, must show an increase in wages). Job search must demonstrate the need for additional training to gain employment. Customer must not have received WIOA classroom training or OJT funding within the past three years. Customer must have the skills and qualifications to participate successfully in training services [§680-210(a)(3)].
- Application Deadlines: Customer must submit a fully completed WIOA CRT application at least three weeks in advance of the training start date. Customer must submit all documentation by the Wednesday prior to training start date. Application is valid for six months and will be retained for six months.
- Marketable Skills: Customers who already possess marketable skills will not be considered for WIOA CRT funding but will be referred to the Career Centers for job search assistance.
- Upskilling: Customer must submit a letter, on employer's letterhead, from current employer stating that the customer will receive at least a \$2 per hour wage increase upon successful training completion. Customer must sign Applicant Statement that they will not receive training funding from any other source, and will not be reimbursed for training costs from another source upon training completion.
- Basic Skills Assessment: Customer must possess the basic academic skills needed to be successful in their chosen training. Basic skills assessment will occur after training application has been submitted. Customers seeking training in Welding or Machinist must pass an approved assessment with a Grade 10 level for both Math and Reading prior to WIOA funding consideration. Customers seeking training in other areas must pass an approved assessment with a Grade 8 level for both Math and Reading prior to WIOA funding consideration. Customers who do not pass the assessment at the required levels will be referred for remediation. Customers must wait 30 days before re-taking the assessment. Assessment scores will remain valid for one year and will be retained for one year. Please refer to WDB Policy for Basic Skills Deficiency for additional information.
- Job Search: If customer is not working full time at the time of enrollment, customer must demonstrate that they have applied for at least 10 jobs in the past 30 days with their current skills. Job search requirement is waived for individuals who are working but are underemployed at the time of enrollment. Job search is also waived for currently enrolled students.
- Wage Increase: Training must lead to an increase in wages, as demonstrated through Labor Market Research or Pre-Hire Letters.
- Labor Market Research: Customer must submit five want ads for the anticipated career field, showing availability of full-time entry-level employment within the local commuting area, and career exploration showing the average rate of pay for this job title. Pay rate must provide an adequate wage leading to self-sufficiency.
- Pre-Hire Letters: For customers who are working at the time of CRT enrollment, customer must document labor market with wage increase or submit a letter on company letterhead from their existing employer, or a pre-hire letter from another employer, stating they will hire the customer at a higher wage upon training completion (letter must include wage rate).
- CDL Training Requirements: For CDL training, two pre-hire letters and a copy of the Motor Vehicle Report (MVR) showing a clean driving record must be submitted for CRT funding consideration. CDL-A training must be a minimum of 160 hours in duration. Individuals with a prior felony conviction must disclose the felony to the training provider and the potential employers to ensure they will be able to gain employment in this career field upon successful training completion.
- Medical Clearance: The customer must have medical clearance to work, with no restrictions, at the time of application. Customers currently receiving Workers' Compensation or customers currently on leave from

work due to medical conditions are deemed to be not medically cleared to work. Customer must submit signed documentation from a medical doctor, either on a prescription pad or on the doctor's letterhead, stating they are able to return to full-time work with no restrictions.

- **Ability to Perform Job Duties:** The customer must be physically able to perform all aspects of the desired training and duties of the job for which WIOA-CRT funding is being sought. Customer must be willing and able to work full time at the time of application.
- **Individuals with Disabilities:** Customers who disclose a disability will need to meet with the Disability Resource Coordinator and to pursue Title IV Funding where appropriate. Customer must submit a Title IV denial letter for WIOA to assist. WIOA-CRT funding must be the funding of last resort.
- **Acceptance Letter:** Customer must provide an acceptance letter from the training institution stating the customer has been accepted into a specific course of study that is certificate/credential bearing. Letter must include anticipated start and end dates of training, name of course of study, all training related costs, and contact information for the training provider. Specific industries/training areas may be designated when funds are limited.
- **Degree Completion:** If a customer is seeking funding for the final year of an approved degree program, customer must provide transcripts, attendance records, and a letter from the training institution stating the customer's expected graduation date. Customer needs to have at least a 90% attendance rate, a 2.0 GPA, and a passing grade on all core courses.
- **Attendance Records:** Customer must provide attendance sheets, signed by customer and instructor, on a weekly basis. If attendance sheets are not received weekly, it may negatively impact funding for transportation allowance and/or funding for future semesters.
- **Employment Upon Training Completion:** Customer must have an immediate goal of full-time employment upon completion of the degree (i.e., no plans to continue on for further education at completion of WIOA training).
- **NCET Career Advisor Assessment Meeting:** Customer must meet with an NCET career advisor for assessment and recommendation for funding prior to WIOA funding consideration. Customer and NCET career advisor will complete an Individual Employment Plan and Comprehensive Assessment, which indicates the training program, dates of instruction, and costs as well as an attestation that prior WIOA-CRT funding has not been used in the past three years. NCET career advisor will determine if additional documentation is required to determine WIOA eligibility based upon individual circumstances.
- **Supportive Services:** Transportation assistance in the form of bus passes or reimbursement for travel to/from training may be funded when all other training related expenses are covered by grants, scholarships, and WIOA funding. Supportive services may not be available if funding is limited. The current Niagara County WDB policy for transportation assistance will be followed. Costs for supportive services will be included on the budget and must remain within the current training cap. Transportation assistance will only be considered for an individual who is not eligible for transportation assistance from any other source.

### **Issuing Individual Training Accounts (ITAs)**

- Customer must have a complete, eligible file including but not limited to documentation of labor market research, job search, review of related skills, and acceptance into approved training institution and course.
- Priority will be given to Niagara County residents. Non-County residents must obtain a letter from their home county stating the home county is unable to fund the customer, using the ITA Denial Letter form (attached).
- Assessment must indicate that the requested training seems appropriate and that the individual possesses the required literacy (results of approved basic skills assessment) and aptitude skills for the desired training program. Career advisor will review current job-related skills, resume, and job search using existing skills.
- **Individual Employment Plan and Comprehensive Assessment** will indicate the training program and dates of instruction, and will indicate that WIOA funding has not been used for classroom training or OJT in the past three years.
- **Release Authorizations** will be completed and signed for access to future employment information and to allow access to training institution information for the customer.

- Budget: NCET career advisor will establish a budget plan with the customer, listing training related expenses and all sources of financial aid for each semester of training. WIOA-CRT funding must be used as the funding of last resort. Budget will include all anticipated training related expenses including tuition, fees, books, supplies, and supportive services. WIOA-CRT funding will be budgeted to fund training expenses in the following order of priority: (1) tuition, (2) fees, (3) books, (4) supplies, and (5) supportive services.
- NCET Career Advisor will complete ITA, Budget worksheet, Attendance form, and Bookstore letter (if needed).
- Other paperwork deemed necessary will be completed.
- OSOS entries will be recorded as appropriate.

**Manager Approval / Review**

Customer's case file is then presented to the CRT manager/designee for review and approval. Additional information and/or clarification may be requested at this time by the manager/designee.

*Approved by WDB Executive Committee: 04/27/2026.*

*Approved by the WDB Board: xx/xx/xx*



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*(716) 278-8587 Fax*

**ITA Denial Letter**

This form is to be completed by the appropriate staff member  
in the county of residence.

Today's Date: \_\_\_\_\_

Name of Customer Applying for Individual Training Account/Classroom Training:  
\_\_\_\_\_

The above named customer states they reside in \_\_\_\_\_ County.

Their county of residence is unable provide WIOA funding for ITA/Classroom Training  
for the following reason(s):

- County of residence does not have funding available for WIOA ITAs at this time.
- Customer does not meet the local policy requirements for WIOA ITA funding.
- Training does not meet the local policy requirements for WIOA ITA funding.
- Customer is not eligible for WIOA funding because: \_\_\_\_\_

An OSOS Comment has been entered explaining the reason for this denial.

\_\_\_\_\_  
Staff Member's Name (Please Print)

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Phone Number