

# Local Governance Monitoring

How monitoring will change

July 18, 2024





# Summary of Monitoring Changes

## Local Governance Policy and Guidance

- Citations will be updated
- CWDS online monitoring
  - Membership list
  - Supporting documents
- Changes to LWDB Recertification Monitoring
  - Business members and multiple categories
  - Executive & standing committees
  - Filling vacancies & interim appointments
  - Category compliance calculations
  - Untimely certification
  - Approval of bylaws





# Summary of Monitoring Changes

## Local Governance Policy and Guidance

- Changes to LWDB Recertification Monitoring (Cont'd)
  - Statement of Financial Interests forms
- Changes to LWDB Recertification/Sunshine Act Monitoring:
  - Voting privileges



# Oversight 101: Monitoring Timeline



## OS Three-Year Monitoring Plan Visualization

	LWDA Contact List/ LWDB Member List (w/docs)	LWDA Contact List/ LWDB Member List (w/docs)	Procurement (Sec 1) & Subcontract (Sec 1B)	Policy & Agreement (Sec 2) Service Delivery (Sec 3)	PACL Re-certification	LWDA Contact List/ LWDB Member List (w/docs) Sunshine Act (Sec 4)	Local Monitoring (Sec 5) One Stop Operator (Sec 9) Performance Review (Sec 6) Fiscal (Sec 7) Audit (Sec 8)	LWDA Contact List/ LWDB Member List (w/docs)	On-site Monitoring
<b>PY24</b>									Apr.-June
Request Date	7/1/24	10/1/24	10/4/24	11/15/24		1/3/25	3/3/25	4/1/25	
Due Date	7/15/24	10/15/24	10/18/24	11/29/24		1/17/25	3/21/22	4/15/25	
<b>PY25</b>									Apr.-June
Request Date	7/1/25	10/1/25	10/1/25	11/10/25		1/2/26	3/2/26	4/1/26	
Due Date	7/15/25	10/15/25	10/15/25	11/25/25		1/15/26	3/20/26	4/15/26	
<b>PY26</b>									Apr.-June
Request Date	7/2/26	10/1/26	10/1/26	11/12/26	11/2/26	1/4/27	3/1/27	4/1/27	
Due Date	7/16/26	10/15/26	10/15/26	11/30/26	12/30/26	1/15/27	3/19/27	4/15/27	



# CWDS Online Monitoring

## Program Year Monitoring Highlight - Dashboard



Commonwealth Workforce  
Development System

[UAT]

HOME

SEARCH

APPS

ACCESSIBILITY

HELP



Hi WFI  
PA CAREERLINK LEHIGH VALLEY  
AT ALLENTOWN

### LWDB MONITORING



Dashboard



Monitoring Activities >



Board Members &  
Contacts Search



Manage Meetings

## LWDB Monitoring Dashboard

### Monitoring Activities [view all](#)



#### PY24 - Sunshine Act Review

Status: + New

Due Date: 06/28/2024

Created By: Erb, Melanie

Release Date: 06/25/2024

#### PY24 Policies and Agreement - Document Ask

Status: + New

Due Date: 06/28/2024

Created By: Erb, Melanie

Release Date: 06/25/2024

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### Extension Requests - Decisions



There are no Extension Requests

### Monitoring Results - Preliminary



### Monitoring Results - Final



### Monitoring Results - Responses



# CWDS Online Monitoring

## Program Year Monitoring Highlights – Monitoring Tool



### BWDA Presentation - PY24 - Sunshine Act Review

Test

Questions









Documents

Extensions

Reviews

Results

Notes

QUESTION	CITATION	RESPONSE	EXPLANATION	ACTIONS
Did the LWDB establish the meeting schedule for regular meetings and Executive Committee Meetings in accordance with the LWDB Bylaws?	20 CFR § 678.400b(1)(vi)	-	-	
What method of public notice is used for LWDB meetings?	PA Sunshine Act § 709(e)	-	-	
Is public notice of the first meeting and a schedule of the remaining regular meetings given at least 3 days prior to the first meeting for PY 2022?	WSP No. 02-2015, Local Governance Policy § IX(l) Meetings	-	-	
Did the notice include items 1, 2, and 3 below?		-	-	
1. Date		-	-	
2. Time		-	-	
C. Substance of all official actions?		-	-	
D. Records of LWDB member abstention from voting (either in the minutes or separate document) and/or acknowledgment of no		-	-	



# CWDS Online Monitoring

## Program Year Monitoring Highlight – Document Request



Questions

Documents

Extensions

Reviews


Results

Notes

▼ Document Request: 5. MOU/Operating Budget

Description of Document Request

A copy of the latest executed MOU/Operating Budget and any modifications.

UPLOAD DATE	FILE NAME / URL	UPLOADED BY	DESCRIPTION	ACTIONS
<div><div>There are no documents uploaded.</div></div>				
<div><div>ADD DOCUMENTS</div><div>ADD DOCUMENT URL</div><div>ADD PREVIOUS PLAN DOCUMENTS</div></div>				

> Document Request: 4. LEO – LWDB Agreement

> Document Request: 3. LEO – Fiscal Agent Agreement

> Document Request: 2. Fully Executed Local Elected Official (LEO) Agreement

> Document Request: 1. LWDB Bylaws

BACK

SUBMIT

# CWDS Online Monitoring

## Program Year Monitoring Highlight – Extension Request



**Policies and Agreement - Document Ask**

**Add Request** close

**Request Information**

**EXTENSION DAYS** (required)

**EXPLANATION** (required)

0 characters of 1500

**CANCEL** **SAVE**

**ADD REQUEST**





# CWDS Online Monitoring

## Board Member and Contact Lists



### Search Board Members & Contacts

[Search Tips](#)[ADD INDIVIDUAL](#)

#### ▼ STATUS

Active (18)  
Inactive (17)  
Not Applicable (14)

[View More](#)

#### ▼ TYPE

Contact (14)  
Member (35)

[View More](#)

#### ▼ LWDA ROLE

Chief Elected Official/Local Elected Official (2)  
Fiscal Agent (1)  
Fiscal Agent Alternate Contact (1)  
Fiscal Manager (1)  
LWDB Chairperson (1)  
LWDB Director (1)  
LWDB Equal Opportunity Officer (3)  
LWDB Monitor (3)  
LWDB Youth Coordinator (1)  
Not Applicable (35)  
Other (3)  
PA Careerlink® Operator/Consortium (1)

SORT BY: Status



1-25 of 49



Active

#### Rutherford, Marge

LWDB: Lehigh Valley Workforce Development Board | Type: Member | Membership Category: A - Business | Member Title: Other | Term: 03/28/2022-06/30/2024  
| Phone: (411) 138-0712 ext.



Active

#### Aldom, Timothy

LWDB: Lehigh Valley Workforce Development Board | Type: Member | Membership Category: C - Education | Member Title: Other | Term: 07/01/2022-06/30/2026  
| Phone: (411) 138-0712 ext.



Active

#### Zurn, Peggy

LWDB: Lehigh Valley Workforce Development Board | Type: Member | Membership Category: A - Business | Member Title: Other | Term: 05/02/2022-06/30/2025  
| Phone: (411) 138-0712 ext.



Active

#### Bristol, Jason

LWDB: Lehigh Valley Workforce Development Board | Type: Member | Membership Category: A - Business | Member Title: Other | Term: 07/01/2022-06/30/2024  
| Phone: (411) 138-0712 ext.



Active

#### Reinert Sr., Michele

LWDB: Lehigh Valley Workforce Development Board | Type: Member | Membership Category: D - Governmental & Economic & Community Development





# CWDS Online Monitoring

## Rollout Timeline

Activity/ Email Message	Channel	Date(s)
Announcement for CWDS 2.0 New LWDA Contact and LWDB Member Functionality Full Launch	Email	7/1/2024
1 <sup>st</sup> Step LWDA Contact & LWDB Membership Functionality Post-Implementation Support Sessions (Office Hours)	Microsoft Teams	7/2/2024; 7/9/2024; 7/11/2024; 7/16/2024; 7/18/2024
Announcement of Virtual-Instructor-Led Trainings (vILT): CWDS Online Program Year and LWDB Recertification Monitoring Functionality*	Email	8/1/2024
Virtual-Instructor-Led Trainings (vILT): CWDS Online Program Year and LWDB Recertification Monitoring Functionality, PART I*	Microsoft Teams	8/20/2024; 8/22/2024
Announcement for CWDS 2.0 New Program Year and LWDB Recertification Monitoring Functionality Full Launch	Email	10/1/2024
CWDS New Online Program Year and LWDB Recertification Monitoring Functionality Statewide Launch		10/1/2024
CWDS Online Program Year and LWDB Recertification Monitoring Functionality Post-Implementation Support Sessions (Office Hours)	Microsoft Teams	10/8/2024; 10/10/2024
Virtual-Instructor-Led Trainings (vILT): CWDS Online Program Year and LWDB Recertification Monitoring Functionality, PART II*	Microsoft Teams	10/22/2024; 10/24/2024
Announcement of available Quick Reference Guides (QRGs)	Email	TBD

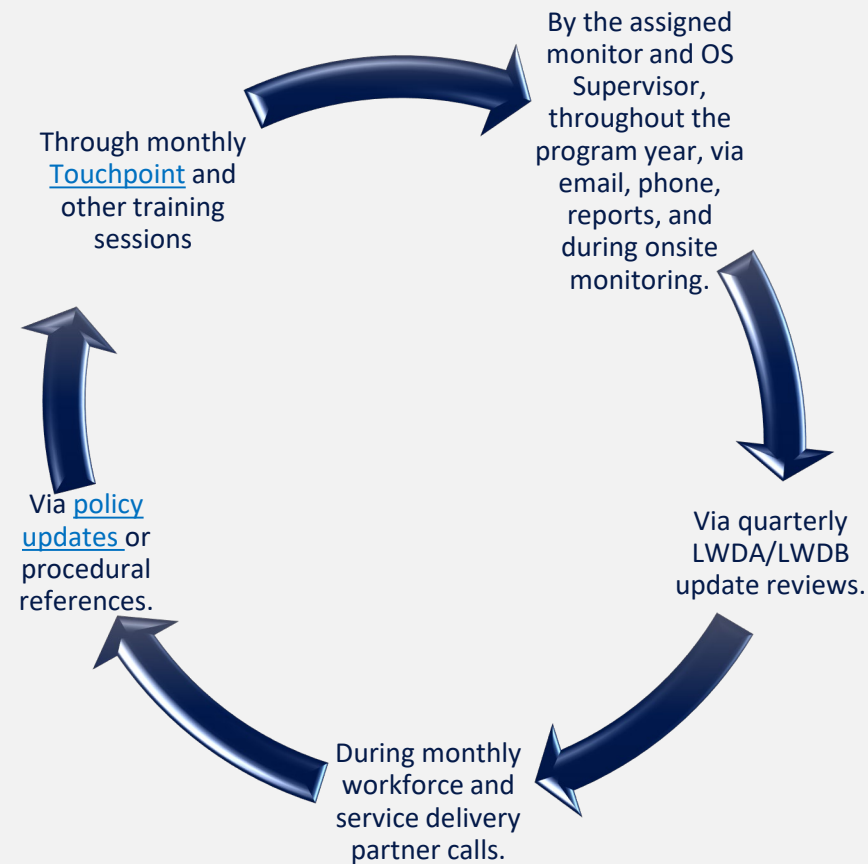
\*Each vILT session will cover the same content of applicable system-related functions.



# Oversight 101: Technical Assistance



## Continuous Technical Assistance Provided by OS





# Thank you!



Oversight Services



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<https://www.dli.pa.gov>

