## Roles and Responsibilities Local Workforce Development Board & Board Staff

This job aid is designed to help illustrate specific ways that staff can support Local Workforce Development Boards with successfully fulfilling their four roles of Convener, Strategist, Manager and Optimizer. For each Board Responsibility outlined in the left-hand column, corresponding Board Staff Tasks are outlined in the right-hand column. Please note this is not intended to be an exhaustive list, but rather a tool you could add to and tailor if there are additional ways you support your Board locally.

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| Board As Convener Responsibilities | Board Staff Tasks |
| Develop the Memorandum of Understanding which includes the Infrastructure Funding Agreement | * Draft Memorandum of Understanding according to direction of board, Chief Lead Elected Official, and state workforce agency. * Coordinate discussions with partner agencies. * Develop Infrastructure Funding Agreements. * Understand various cost sharing methodologies. * Serve as lead organization on development of documents. * Submit documents to state agency per guidance. * Conduct reconciliation at agreed upon intervals. * Hold partner organizations accountable to Memorandum of Understanding and Infrastructure Funding Agreement. |
| Develop, modify, and implement the Local Plan | * Convene local workforce development system stakeholders to assist in the development of the local plan. * Identify non-Federal expertise and resources to leverage support activities. * Organize stakeholder meetings/ input sessions. * Organize/ coordinate/ write the plan draft. * Adhere to public comment period protocol. * Follow local board/ Chief Lead Elected Official outlined process and timeline to ensure review and approval. |
| Create and maintain relationships with community organizations including business, education, one stop partners, and economic development | * Identify groups with whom relationships should be developed and maintained. * Dedicate time and perhaps specific staff roles to partnership development. * Develop a partnership scope to guide decision making on groups to approach for new partnerships (e.g. based on needs of customers or a gap in existing service delivery). * Be able to easily articulate the value proposition of the workforce system to your potential partners. * Build trust with partners through effective communication and being realistic in the manner and scope of your ability to effectively partner (don’t over deliver). * Ensure underrepresented voices and perspectives have a seat at the table. |
| Leverage and solicit funding from non-federal sources | * Research other funding opportunities. * Write grant applicants and respond to Requests for Proposals and other competitive solicitations. * Partner with organizations to enhance services. * Pursue 501c3 designation if decided upon by local workforce development board. * Develop procedures and protocols to support the award of additional dollars. |

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| Board As Strategist Responsibilities | Board Staff Tasks |
| Conduct workforce research and labor market analysis | * Maintain access to relevant data beyond performance measures and make available to board. * Analyze data regularly to understand trends in local and regional economy. * Ensure board members and elected officials understand the data to use it for decision making. |
| Design the local workforce system and oversee its implementation | * Based on needs of local area and data, propose innovative programming to the board and Chief Lead Elected Official. * Become subject matter experts in the needs of the community (both data-driven needs and anecdotal). * Coordinate services with partner organizations to meet identified needs. |
| Lead efforts to design, develop and implement career pathways | * Conduct research of local employment data to determine top occupations, industries, and skill sets. * Collaborate with representatives from business, secondary, postsecondary education programs and other groups to achieve seamless and integrated services which are business-driven. * Analyze talent development needs compared to the training program offerings in the local area and work to ensure alignment. |

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| Board As Manager Responsibilities | Board Staff Tasks |
| Develop the budget | * Work collaboratively with grant sub recipient/ fiscal agent staff to provide relevant information:   + Provide historical budget and expenditure information.   + Funds allocated.   + Current contractual obligations.   + Infrastructure Funding Agreement. * Maintain thorough understanding of how WIOA funds (and other funds under the local board) can be spent including limitations. * After development, work collaboratively with grant sub recipient/ fiscal agent staff to provide regular and timely financial reports including information specific to each contract. * Facilitate obtaining approval of chief local elected official. |
| Competitively procure One Stop Operator, Youth Services Provider and Adult Dislocated Worker Career Services Provider | * Prepare the procurement documents and descriptions per board specifications. * Coordinate the procurement process, including but not limited to, advertising the Request for Proposals (RFP), working with designated committee (if appropriate) to maintain deadlines and evaluate documents, bids, or proposals. * Provide relevant data to support board’s decision making. * If directed, make recommendation to the board while adhering to procurement guidelines. * For one stop operator, facilitate obtaining approval of chief local elected official. |
| Develop and issue contracts for services | * Establish outcomes to be achieved by service providers that go beyond common measures of WIOA. * Issue contracts, per board decision, to service providers. * Monitor service providers for contractual compliance. * Provide monitoring reports to providers, board, and chief local elected official. * Provide training and technical assistance to service providers. * Become subject matter experts in the areas of programs and effective strategies. * Develop relationships with services providers that support growth mindset and innovative thinking. |
| Develop policies and procedures | * Identify areas or topics which require policy. * Draft policies for board consideration. * Ensure implementation of policies through effective monitoring of providers and contracts, and supervision of board staff. * Collaborate with grant sub recipient/ fiscal agent staff regarding fiscal policies and procedures. |
| Conduct board business in accordance with Sunshine Act provisions | * Provide full range of staff support to board and committee meetings:   + Send meeting notice to members,   + Draft agenda based on guidance from board/ committee chair,   + Attend meeting and take minutes, and   + Provide subject matter expertise as needed. * Maintain information on board members such as contact information, membership category, term beginning and end date, board meeting attendance, and committee assignments. * Help to ensure board adheres to by-laws, parliamentary procedure, and Open Meetings laws. * Submit chairperson’s name to state agency. |

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| Board As Optimizer Responsibilities | Board Staff Tasks |
| Certify one-stop centers | * Based on guidance from board, outline a process to complete certification of centers. * Coordinate certification process based on information provided by state agency and/ or state board. * Collaborate with partners to carry out certification process. * Report results back to the Board. |
| Negotiate performance measures and hold entities accountable to meet the measures | * Ensure board and chief local elected official are knowledgeable of performance metrics and negotiation process. * Provide data to board and chief local elected official to help reach an informed decision. * Represent the interest of the system. * Be knowledgeable of past and current performance levels of your local area and be informed of trends in the local market which are impacting or could impact future performance outcomes. * Negotiate in good faith. * Report back to local board and chief local elected official per their instruction. |
| Negotiate performance measures and hold entities accountable to meet the measures | * Ensure board and chief local elected official are knowledgeable of performance metrics and negotiation process. * Provide data to board and chief local elected official to help reach an informed decision. * Represent the interest of the system. * Be knowledgeable of past and current performance levels of your local area and be informed of trends in the local market which are impacting or could impact future performance outcomes. * Negotiate in good faith. * Report back to local board and chief local elected official per their instruction. |