

**Chautauqua Works**  
**WORKFORCE INVESTMENT/DEVELOPMENT BOARD**  
**MEETING MINUTES**

Wednesday, May 27, 2026  
11:30 am – 1:00 pm  
Moonbrook Country Club  
2879 N. Main Street Ext.  
Jamestown, NY 14701

PRESENT:

Shelby Bilskie  
Amber Blashak  
Heather Brown  
Marie Carrubba  
Christine Emmick  
John Healy  
Daniel Heitzenrater  
Michelle Jones  
Kent Joesel  
Frank McAndrew  
Michael Pease  
Dan Smith  
William Smock  
Vincent Trippi  
Grant Umberger

EXCUSED:

Candace Pacitti  
Dave Pihl  
Paul Stage  
Heather Turner  
Todd Trantum

ABSENT:

ALSO PRESENT:

Katie Geise– Chautauqua Works WIB/WDB  
Jody Cheney – Chautauqua Works WIB/WDB  
Cheryl Lawson – Chautauqua Works WIB/WDB  
Colleen Lester – Chautauqua Works WIB/WDB  
Clair Swanson – Chautauqua Works-CSD  
Barb Deike - NYSDOL



*Meeting was called to order by Mike Pease, Vice-Chair at 11:34 am.*

**Agenda Item 1 – Roll Call**

15 - present    5– excused    0– absent

**Agenda Item 2 – Chair’s Report**

**Agenda Item 3 –Director’s Report – Katie Geise**

**WIOA Funding** – The bad news is NY State received an overall 10% cut in WIOA funding. Of course, that impacts every local area’s WIOA Allocation for PY26 (July 1, 2026 – June 30, 2027). Chautauqua’s Allocation was cut by 18.87% from last year’s funding amounts. While this was not the highest local area cut, it was among the highest. Cuts ranged from 9.38% to 19.22% with only NYC not falling in that range with a 5.99% decrease. The majority of areas fall in the 12.02% and 19.22%. There continues to be active advocating and educating on the impacts of WIOA Title I Youth, Adult, and DW funding cuts. Essentially, continuously cutting of WIOA funding across all Titles will destroy the workforce system infrastructure.

On the State level, the New York state legislature has approved a 15th emergency budget extender, keeping state workers paid while negotiations on the overdue state budget continue. The temporary extender funds government operations through Thursday, with the multibillion-dollar spending plan almost two months late. The Democratic legislative leaders and Governor Kathy Hochul are finalizing the total financial plan, estimated to fall between \$262 billion and \$270 billion.

Other potential funding opportunities are being pursued. Currently, the most promising are potential additional ESD Manufacturing and Tech funding and potential Economic Development funding specifically for OJTs.

**Bush Industries Closing** – On Monday, April 27<sup>th</sup>, the HR Director at Bush called asking if we could provide any kind of information session for their impacted employees of the pending confidential closing set to occur on Thursday, April 30<sup>th</sup>. Typically, the WNY Region’s Rapid Response staff coordinate such sessions. Unfortunately, due to the very short notice, they were already booked that week. Our local team planned and provided an in-person information session at Bush on Wednesday, April 29<sup>th</sup> just two days later. Clair and her staff, in coordination with members of Frank’s local staff, provided information on everything from local available services to basic Unemployment Insurance information to more than 100 impacted workers. 232 individuals lost their jobs the next day. Staff have been working with impacted employees since the lay off day. Our area’s Business Services Rep, Laura Simons, planned a Bush impacted employee only job fair on May 19<sup>th</sup> in our Jamestown Chautauqua Works office. 23 businesses and service providers and 52 impacted employees attended.

**Program specific highlights:**

**YEP** – We are finishing our second full school year (9/1/25-6/30/26) funded program. To date, we have received 130 completed applications. 92 youth have been placed at worksites and participated in the program. The YEP staff continue to do an amazing job implementing this program with Jody leading the effort as the WIB staff lead. We are anticipating another smooth transition to SYEP.

**SYEP** – We have been designated by Chautauqua County Department of Mental Hygiene and Social Services to administer this year’s SYEP. To date, local area’s have not received SYEP required program paperwork and funding notifications. We believe that this is due to the delayed State budget.

**CAP** – This will be our last year of CAP funding and we will expend the full budget by the end of this summer. There are currently 5 interns working or about to start working. The interns and their placement sites were listed in your packet.

**Manufacturing and Tech Workforce Ecosystem Development Program** – This is our program funded through Empire State Development and the Ralph Wilson Jr Foundation. Workforce Ecosystem Developers have planned, hosted, and facilitated three (3) Manufacturing and Tech business meetings, two (2) training provider meetings, and three (3) Manufacturing and/or Tech Job Fairs. 66 participants have enrolled in Manufacturing and/or Tech related training programs. 26 participants have completed a Manufacturing and/or Tech related training program. 23 graduates have obtained employment with 10 being industry related employment.

**Agenda Item 4 - Operator Report –Clair Swanson**

Success Stories were included in your packet for Adult, Dislocated Workers, and Youth. This year, all of the dislocated worker training funds have been spent. Have served over 100 individuals. This includes \$250,000 incentive funds received. All youth Work Experience money has been spent. OJT has expanded and have done 16 OJT’s so far and have added 2 new businesses (12 last year). Clair stated she is very disheartened with all of the WIOA funding cuts.

**Agenda Item 5: – Finance Report – Cheryl Lawson**

Cheryl Lawson explained there are several finance-related items on today’s agenda that will require Board action at the end of the meeting.

**Auditing Services Renewal**

The auditing services RFP was issued on January 23, 2023, for a one-year term with the option to renew annually for up to three additional years. Bysiek CPA, PLLC was awarded the contract. The contract amounts were approved as follows: \$9,500 for year one (7/1/22–6/30/23), \$9,750 for year two (7/1/23–6/30/24), \$10,000 for year three (7/1/24–6/30/25), and \$10,000 for year four (7/1/25–6/30/26).

We are currently in year four, which is the final renewal year under the current agreement. At its May 12, 2026 meeting, the Finance Audit Committee approved bringing forward a motion to renew the contract with Bysiek CPA, PLLC for year four (7/1/25–6/30/26) in the amount of \$10,000.

As this is the final renewal year under the current RFP, the auditing services contract will be reissued for RFP later this year.

The Board was given an opportunity to ask questions, and no questions were presented.

#### **Transfer Requests for Current PY 2025 WIOA Funds**

We plan to submit two transfer requests in June related to PY2025 WIOA funding. Pursuant to New York State Technical Advisory 17-6, dated June 15, 2017, the Workforce Investment Board (WIB) may transfer up to 100% of Administration funds back to the originating Adult, Dislocated Worker, or Youth program funding categories, provided the transfers do not exceed the original ten percent (10%) designated for Administration. The WIB may also transfer up to 100% of funds between the Adult and Dislocated Worker funding categories with Board concurrence and approval. To maintain flexibility in responding to workforce needs and continue supporting training initiatives, the WIB is requesting Board approval to transfer up to \$60,000 from PY2025 Administration funds to PY2025 Adult and/or PY2025 Dislocated Worker funds. In addition, the WIB is requesting authorization to transfer up to \$100,000 between the PY2025 Adult and PY2025 Dislocated Worker funding categories, as needed. At its May 12, 2026 meeting, the Finance Audit Committee approved bringing forward a motion to the Board for consideration and approval of these transfer requests.

The Board was given an opportunity to ask questions, and no questions were presented.

#### **Next Fiscal Year Budget (7/1/26-6/30/27)**

The Finance Audit Committee approved bringing forward a motion to adopt the proposed budget for the next fiscal year.

We are anticipating an approximate 18.87% reduction in WIOA formula funding for the upcoming fiscal year. We have not received official notice via a NOA, but the state released draft allocations on Tuesday, May 26, 2026 at 5:45pm for awareness and planning purposes. WIOA allocations are determined annually through federal appropriations and state distribution formulas, which can fluctuate each year. In response to the projected decrease, expenses were adjusted proportionately to maintain a balanced and fiscally responsible budget while continuing to support core workforce services and training initiatives.

**Revenue** - We are projecting an approximate decrease of \$1,127,000 in revenue in next year's budget.

WIOA and NYSDOL funded programs account for approximately \$870,000 of that reduction. In addition, the Program Incentive, Fiscal Incentive, and OJET RETI funding streams are all scheduled to end on June 30, 2026, and we have not yet received notification regarding future awards for those programs.

We also expect a decrease in special and unrestricted revenue generated through various grants of approximately \$257,000. Two notable examples include the ESD funds and the Chautauqua County Workforce Development Initiative (WDI) funds. The ESD contract, which supports workforce training in manufacturing and technology, is currently scheduled to end on October 31, 2026. We are requesting a no-cost time extension for that contract and have been verbally told we should receive it.

The Chautauqua County Workforce Development Initiative grant was awarded as a five-year contract, and we are currently in the final year of that agreement. The contract is scheduled to end on December 31, 2026; however, we anticipate fully expending the remaining funds during the summer months. This contract supports the CAP program, which provides internship opportunities for students during college breaks. We currently have five interns participating this summer.

**Expenses** - Expenses decreased proportionately with the projected reduction in revenue. The \$870,000 decrease in WIOA and NYSDOL funded programs is reflected across One-Stop Operator expenses, non-operator program expenses, and system expenses. The most significant impacts are related to the Operator Contract, Program and Fiscal Incentives, OJET RETI, and overall system operating expenses.

Additionally, during the previous fiscal year, we incurred a significant equipment purchase totaling more than \$100,000. We do not anticipate a similar purchase in the upcoming fiscal year, which allowed for a substantial reduction in the equipment line item within the proposed budget, which is reflected in the Operating Expense line.

This has been a challenging period; however, staff remain focused and proactive in maximizing current resources while pursuing additional funding opportunities to strengthen and expand services. In response to the funding reductions, we are actively seeking supplemental resources. We are currently working with the County to secure a grant to support OJT activities, as well as partnering with various colleges to enhance staff outreach efforts related to training initiatives. In addition, we are reviewing our current contracts and identifying co-enrollment opportunities to better leverage available funding and expand services to a greater number of individuals in the community.

The Board was given an opportunity to ask questions.

Kent Josel expressed disappointment regarding the decreased WIOA allocations for Chautauqua County.

Katie Geise noted that while the County did not receive the largest reduction, it was the second highest, with cuts ranging primarily between 12% and 19%, and the lowest reduction being 6% for New York City.

Dan Heitzenrater asked how the allocations are determined and whether they are based on performance.

Katie Geise and Clair Swanson explained that the allocations are not performance-based, noting that incentive funds have been awarded in prior years for meeting program and fiscal performance measures.

Katie Geise further stated that the allocations are formula-driven, based on a federally required funding methodology and not on local performance outcomes. She explained that the allocations are calculated using labor market and economic data for each Local Workforce Development Area (LWDA); however, the specific formula, data, and calculations are not shared locally, and only final allocation amounts for each area in New York State are provided.

Katie asked Barb Deike of NYSDOL whether she had any additional information, and Barb indicated that she did not. The WIB will seek further information from the State and provide an update to the Board.

#### **Operator Contract for Period Covering 7/1/26-6/30/27**

The Finance Audit Committee approved bringing forward a motion to adopt the proposed Operator Contract for the period covering 7/1/26–6/30/27.

The WIOA Title I Services and System Operator Request for Proposals (RFP) was issued on 3/17/2025. At that time, the estimated annual funding range for the One-Stop Services and System Operator Contract was projected to be between \$370,000 and \$750,000. The final contract amount may fluctuate based on changes in available funding, including new grant opportunities, as well as funding adjustments from the New York State Department of Labor and other workforce funding sources. The contract amount is ultimately determined based on available resources and local workforce needs.

The proposed contract amount reflects current funding projections, anticipated supplemental incentive funding, and expected PY2026 WIOA allocations. The current One-Stop Services and System Operator Contract for the period of 7/1/25–6/30/26 is funded at \$600,000. Based on anticipated reductions in WIOA funding, the WIB/WDB is recommending issuance of the One-Stop Services and System Operator Contract in an amount up to \$490,000 for the period of 7/1/26–6/30/27.

The Board was given an opportunity to ask questions, and no questions were presented.

#### **Current Budget/Changes in Current Budget through April 30, 2026**

At its May 12, 2026, meeting, the Finance Audit Committee approved bringing forward a motion to adopt the current budget and changes in the current budget through April 30, 2026.

Revenue - NY SCION funding increased approximately \$6,000. The PY2023 NY SCION budget decreased by \$24,000; however, the OMH SCION budget increased by \$30,000, resulting in a net increase of approximately \$6,000. There were no changes in Special and Unrestricted revenue.

**Expenses** - We fully expended the Program and Incentive funds on training activities, which carried an earlier expiration date of 6/30/2026. We have expended the majority of Adult ITA funds; however, we are currently under-expended in Dislocated Worker ITA funds. This is the basis for the transfer request discussed earlier in the meeting, as there is strong demand for Adult training dollars.

We have met the WIOA Youth requirement to expend at least 20% of the PY2025 Youth allocation on work experiences.

WIB Program Support and Administrative Support reflect variances due to staff time being allocated across multiple grant-funded initiatives over the fiscal year, including ESD, Youth Employment Programs, Summer Youth Employment Programs, and the Chautauqua County Workforce Development Initiative internship grants.

Special and Unrestricted Grant Expenses are currently under-expended in YEP/SYEP funding. However, this variance continues to narrow as recruitment efforts progress, and we have seen an increase in youth applications over the past two months.

The Empire State Development (ESD) Workforce Development Grant and the Ralph C. Wilson, Jr. Foundation grant are similarly showing variances as we continue to recruit both businesses and trainees. We have recently negotiated a revised budget for the Ralph C. Wilson, Jr. Foundation grant, which will allow us to retain staffing beyond October 31, 2026, supporting continued training momentum.

The HHS grant was under-expended due to staffing turnover during the fiscal year.

The Mobility Manager grant was also under-expended due to staffing turnover; however, a new staff member began employment yesterday, on May 26, 2026, and we anticipate this variance will decrease over the coming months.

The Chautauqua County Workforce Development Initiative and NCCF Internship programs primarily operate during the summer months (May–August), as most internships align with college breaks. We anticipate fully expending those funds by the end of the summer.

The Board was given an opportunity to ask questions, and no questions were presented.

### **Cost Allocation Plan Update**

The WIB/WDB Cost Allocation Plan was recently reviewed by the New York State Department of Labor (NYSDOL) Financial Oversight and Technical Assistance (FOTA) Unit, resulting in several recommended revisions. As you may be aware, the State recently underwent monitoring and received findings related to this area, prompting a statewide review of cost allocation plans. In response, we have updated our Cost Allocation Plan in accordance with State guidance. The plan was approved by the state on May 20, 2026.

The Board was given an opportunity to ask questions, and no questions were presented.

### **Unemployment Insurance Election Status Change**

The WIB/WDB recently reviewed its unemployment insurance election and identified recommended revisions for the upcoming calendar year.

The WIB/WDB currently utilizes the reimbursable (direct pay) method, under which unemployment claims are paid directly to the State as they are incurred. While this approach can result in cost savings during periods of minimal claims activity, it also exposes the organization to significant financial risk during workforce reductions, when costs can be unpredictable and substantial.

In addition, under the reimbursable method, unemployment costs are often incurred after grant-funded programs have ended. As a result, these charges cannot be allocated to expired grants, creating compliance and funding challenges, since closed grants are not eligible for post-period expenses.

In contrast, the contributory (tax) method distributes risk across participating employers and provides more predictable and manageable costs. Under this method, the WIB/WDB would make regular unemployment tax payments that can be appropriately allocated to active grants, supporting compliance with funding

requirements and eliminating post-grant liability exposure. This approach converts potentially large, unexpected costs into predictable, budgeted operating expenses.

This transition is consistent with common practice among nonprofit organizations that rely on grant funding, many of which ultimately move from a reimbursable model to a contributory system to improve financial management and compliance.

Under New York State regulations, a change in election status requires formal approval and is not automatic. To implement the change for calendar year 2027, the request must be submitted by December 31, 2026. If approved, the WIB/WDB will transition from reimbursing individual unemployment claims to making quarterly unemployment tax payments effective January 1, 2027.

The Board was given an opportunity to ask questions.

Marie Carruba asked whether there would be any upfront costs or how any outstanding costs would be handled when the new process is implemented. Cheryl explained that we must be current on all payments and cannot have any outstanding balances. She also clarified that there are no upfront costs; however, we will begin paying quarterly taxes starting January 1, 2027.

Katie Geise further explained that we can return to a reimbursable direct pay method if this option does not work well for us. However, we would be locked into the election for one year, as the election must be made on a calendar-year basis.

Cheryl Lawson added that, as we continue to receive grants requiring employees to be placed on our payroll, we face increased risk exposure. She explained that this change is being made to mitigate post-grant liability exposure.

#### **Agenda Item 6 – Resolutions**

- Motion 1:** To approve the minutes from October 29, 2025 meeting. **Motion to approve was made by Marie Carrubba and seconded by Bill Smock.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 2:** To approve the revised budget for Fiscal Year July 1, 2025 – June 30, 2026, as recommended by the Finance Audit Committee, reflecting updated state allocations, grant funding received, anticipated revenues, and related expenditure adjustments based on information currently available. **Motion to approve was made by Shelby Bilskie and seconded by Grant Umberger. Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. Vote approved and motion carried.**
- Motion 3:** To approve the Finance Audit Committee’s recommendation to accept the fiscal year 2025-2026 budget-to-date for the period covering July 1, 2025 through April 30, 2026, based on funding and expenditure information currently available. **Motion to approve was made by Christine Emmick and seconded by Michelle Jones.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 4:** To approve the Finance Audit Committee’s recommendation to renew the auditing services contract with Bysiek CPA, PLLC for Fiscal Year ending June 30, 2026, in the amount of \$10,000.00, to conduct the Single Audit, Management Letter, Form 990, and CHAR500. **Motion to approve was made by John Healy and seconded by Dan Smith.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**

- Motion 5:** To approve Finance Audit Committee’s recommendation authorizing the transfer of up to \$100,000.00 between Program Year (PY) 2025 Dislocated Worker and PY2025 Adult allocations, as necessary to meet local workforce needs. **Motion to approve was made by Kent Joesel and seconded by Heather Brown.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 6:** To approve Finance Audit Committee’s recommendation to authorize the transfer of up to \$60,000.00 of PY2025 Administration funds back to the originating PY2025 Adult and PY2025 Dislocated Worker program allocations, as needed, to address local workforce needs and maintain workforce training efforts. **Motion to approve was made by Marie Carrubba and seconded by Shelby Bilskie.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 7:** To approve the Finance Audit Committee’s recommendation to accept the July 1, 2026 through June 30, 2027 fiscal year budget. **Motion to approve was made by Dan Smith and seconded by Christine Emmick.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 8:** To approve the Finance Audit Committee recommendation to fund the WIOA Title I Services and System Operator Contract for fiscal year July 1, 2026 – June 30, 2027 in an amount up to \$490,000. **Motion to approve was made by Michelle Jones and seconded by Vincent Trippi.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 9:** To approve the One-Stop Operator Services Review Committee and the One-Stop System Operator Review Committee recommendations to accept the Career System Development contract renewal to operate the One-Stop Career Centers for the period of 7/1/26-6/30/27. The contract amount for July 1, 2026 through June 30, 2027 is \$490,000, with the option to increase or decrease the amount per the 2025 RFP monetary guidelines, if the need exists throughout the fiscal year. **Motion to approve was made by Marie Carrubba and seconded by Grant Umberger.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**
- Motion 10:** To approve the RFP Review Committee's recommendation to renew DFT's contract to provide Hosted VOIP/Fiber Link/Internet Services for the period of 5/1/26-4/30/27 for an estimated amount of \$28,500. **Motion to approve was made by Dan Heitzenrater and seconded by Dan Smith.** Prior to voting, the question was asked if anyone needed to abstain from voting. There were no abstentions. **Vote approved and motion carried.**

**Agenda Item 7 – New Business**

No new business.

**Meeting was adjourned at 12:15 pm.**

**Reminder: The next Workforce Investment Board Meeting will be in Fall 2026. Date, time, and place to be determined.**

\_\_\_\_\_  
Jodell Cheney, Administrative Assistant

\_\_\_\_\_  
Christine Emmick, Secretary

Date Approved: \_\_\_\_\_

DRAFT