

**SOUTHWESTERN AREA  
WORKFORCE DEVELOPMENT BOARD**

**Technical Assistance and Training  
Policy 17-12.1**

**Effective Date**

August 14, 2025

**Applicability**

This applies to Workforce Innovation and Opportunity Act (WIOA), Adults, Dislocated Workers, Youth Participants, Business Service Teams, & Eligible Training Providers.

**Purpose**

To provide Adults, Dislocated Workers, and Youth Provider Services, Business Service Teams, & Eligible Training Providers for which contracts are entered with the Southwestern Area Workforce Development Board (SAWDB/ Local Board) for guidance, technical assistance, and training.

**Background**

This policy provides updated and comprehensive guidelines for Workforce Innovation and Opportunity Act (WIOA) service providers regarding technical assistance and training.

**Action**

This policy authorizes the Administrative Entity to administer guidance and technical assistance and training for providers as stated in WIOA Title I Section 168.

**Technical Assistance**

Technical assistance will be used to address performance and encourage an environment of continuous improvement. Upon request, the local board will assist the service provider or sub-recipient with identification of technical assistance resources. Subject to the availability of funds, service providers or sub-recipients through the local board may apply to the state administrative entity for funds to support technical assistance initiatives. Such funds will not be provided for administrative costs, staff salaries or benefits, out-of-state travel, meals or refreshments, capital equipment purchases, including computers or other equipment. Local boards or sub-recipients may apply their performance incentive awards for technical assistance.

Technical assistance may include, but is not limited to, training or support on the following:

- A. Improving assessment processes and methodology.
- B. Performance management and associated record keeping.
- C. Case management.
- D. Monitoring of participant online files.
- E. Use of management information systems.
- F. Follow-up services.
- G. Linkages with business, Required Workforce System Partners, and stakeholders.

- H. Identifying areas that need improvement can be a collaborative effort by sponsoring a session to review problems or issues.

### **Trainings**

At least one member from each office or educational provider must attend the training that the Administrative Entity provides. If an extenuating circumstance prevents a member from attending, the administrative entity must give prior approval.

### **WIOA Case Managers**

Training will be provided to improve the management of participant online files, America's Job Center (AJC) data entry, including case notes, usage of the systems alerts, performance measures, policies & procedures, accuracy in filling out participant/employer forms, Individual Training Accounts (ITA), On-the-Job Training (OJT), Customized Training & Work Experience contracts, and other training as needed.

The Administrative Entity will provide training as deemed necessary to ensure case managers are provided with quality customer service.

The Administrative Entity's goal for the Local board is to provide quarterly training as necessary to ensure case managers provide quality customer service; however, the Administrative Entity may deem it necessary to skip training for unforeseen reasons.

The training provided by the Administrative Entity is mandatory for all WIOA-funded Case Managers. The Administrative Entity must give prior approval if an extenuating circumstance prevents a case manager from attending a training engagement.

### **Business Services Teams**

Training is provided to improve relationships with business executives and familiarize them with their workforce needs. It shall also assist businesses in accessing and implementing valuable services to address their employment needs, promote peer-to-peer networking, and promote effective communication.

The Administrative Entity may provide quarterly training courses to ensure that the business service team members provide quality customer service and are familiar with the business's needs.

### **Eligibility Training Providers**

Eligible Training Providers (ETPs) will receive training to understand the importance of accurately entering provider and program information into the NMJobs database.

The Administrative entities will provide training as deemed necessary to ensure the relationship between the Eligible Training Providers (ETP), Service Providers, Administrative Entities, and the Local Board. The goal is to provide quarterly training as deemed necessary to ensure that ETPs understand the purpose of entering all information critical to the currency and accuracy of the database (NMJobs).

### **Inquiries**

Questions related to this policy should be directed to the Administrative Entity or Fiscal Agent at (575) 744-4857.

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**Attested**

This policy was reviewed and approved by the SAWDB on August 14, 2025.

Jacqueline Fryar  
SAWDB Chair