

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD FY 2015 ANNUAL PLAN PRINCIPLES

Dislocated and 'Adult' Workers

Principle 1. Continue to focus our regional workforce development job pipeline on advanced manufacturing, entry to low and mid-level health care, green technology and other emerging industries as stated in our High Performing WIB document but do not lessen support to other areas that have job openings and good wages.

Principle 2. Narrow who is considered marketable when unemployment is high and expand who is considered marketable when unemployment is low. This especially applies to people formerly employed in high unemployment sectors while other sectors that require similar skills have lower unemployment.

Principle 3. Focus WIA Title I funds on occupational skills training and not on academic remediation. Encourage WIA Title II recipients to dedicate a part of their academic remediation funding towards preparing adult and family literacy students for occupational skills training.

Principle 4. Continue setting lower limits to how much Title I money should be spent per individual. Base limits on funding availability and sector unemployment levels. Ensure customers have achieved appropriate academic skill levels before placing them in WIA-funded training.

Principle 5. Because of the impact of UI On-line, expand marketing efforts to draw-in people who would benefit from training and other WIA intensive services.

Youth

Principle 1. Help end the idea that the workforce development system is an alternative to acquiring a good academic foundation and graduating from high school. Continue to consider poverty the over-riding barrier to employment (and do not consistently demand that there be still more barriers).

Principle 2. Continue to allocate a portion of youth subsidized employment money by lottery while also dedicating a portion to rewarding low-income youth who have maintained good grades/comportment or who have significantly improved them.

Principle 3. Seek, encourage and counsel economically disadvantaged youth who have a good academic foundation to both work and go to college. Tangibly encourage their dependability as appropriate.

Partner Relations

Principle 1. Seek out ways to cost-effectively obtain data that helps gauge the effectiveness of career center services and vendor offered training. Data should help gauge their respective effectiveness in both the short and long term. Work with employer, educator and other partners to adjust action in accordance with the changing economic and workforce development situation.

Principle 2. Clearly advise State and Federal administrators on regional perceptions of federal and statewide policy and process changes as they impact direct services and service outcomes. Raise issues important to employers, educators and the unemployed.

ATTACHMENT AA

Massachusetts FY15 Local Annual Plan Narrative Questions

Please respond to each question within this template. Narrative response must provide sufficient detail so the general public or interested parties are able to understand the process or procedure described.

1. **Labor Market Information** (Note: if the information below is clearly delineated in the WIB Strategic Plan (SP) you may insert a reference to the SP page number(s).

- a. Please provide a profile of the region's current and projected employment opportunities by business and industry, including the job skills necessary for participants to obtain employment in these jobs.

A comprehensive profile of the regions current and projected employment opportunities and the education and occupational skills required for those jobs is included in the MVWIB Strategic Plan (Attached) submitted as part of the DCS Workforce Investment Board Certification process submitted and approved in October of 2013.
Pages 1-14.

- b. Please describe the demographics of the jobseekers in your region, including special/targeted populations. Please include skill sets and analysis of skill gaps.

Demographic data on each of the targeted WIA populations served through WIA funding is included in detail within the MVWIB Strategic Plan referenced above. Particular and more detailed attention has been given to the youth population in the region which focused on an analysis of Education and employment statistics and demographics of youth in the City of Lawrence compared to other "Gateway Cities" in the Commonwealth. This information is outlined in pages 14-23 of the MVWIB Strategic Plan.

- c. Please describe the LMI tools that staff are currently using with customers.

MACIS (<http://www.masscis.intocareers.org/>), ONET (<http://online.onetcenter.org/>), Career Information Network (<http://www.careerinfonet.org/>), America's Career Information Network (www.acinet.org/occ_intro.asp), OOH and Career Guide to Industries (<http://www.bls.gov/OCO/>; <http://www.bls.gov/oco/cg/home.htm>)

My Skills My Future (www.myskillsmyfuture.org), My Next Move (www.mynextmove.org) and TORQ
MA LMI Regional Profile, MA Career Moves, MASS STATS, BLS economic news releases
Merrimack Valley Blueprint

Internet searches that provide vendor neutral information on employment growth or decline and/or forecasts for occupations where employment growth is anticipated.

Newspaper articles describing areas of decline, industries where there is high unemployment or describing companies' closures, layoffs or outsourcing of employment.

Job postings for openings in the customer's occupation listing qualifications required

Articles from the VWCC Executive Director regarding occupational labor demand.

- d. What training or staff development is currently offered or planned to keep staff abreast of LMI trends?

Staff have attended DCS Labor Market 101 trainings in the past and received briefings on local LMI from our MVWIB, the Merrimack Valley Planning Council, local Chambers of Commerce, and regional industry and employer organizations and focus groups. In the coming FY, we will continue to develop additional resources and LMI networks to assist us in identifying current and emerging employment opportunities and workforce training needs to ensure that we will meet the challenges our employers and job seekers face.

- e. Please verify that the Career Center Seminar (CCS) that is being delivered is the most current version, as directed in MassWorkforce Policy Issuance #14-29.

ValleyWorks Career Center is delivering the most current version of CCS per Policy Issuance 14-29. VWCC has enhanced some slides to include programs and services specific to our local area as well as re-ordered the slides to meet our triage and customer flow process. We have included additional slides titled: Workshop Registration, Agenda for Specialized Services, Additional slide for Veterans, College and Career Navigator, Migrant Seasonal Farm Worker, Things to Know about Training, Work Search Activity Log, Work Search Requirements, REA Intro slide, Next Steps for All Jobseekers, 4 Additional A/CAP Development Slides and the REA Next Steps slide.

2. One-Stop Delivery System Information

- a. **Customer Flow:** Please provide a description of triage or other processes for customer flow: WP, UI assistance, Trade, REA, NEG, Adult, DW, Youth, SCSEP, Re-Entry, Individuals with Disabilities, Veterans, TANF, etc.

Please see attached Customer Flow – VWCC chart (**attachment A**) which outlines customer flow and triage stages for all jobseekers at VWCC.

- b. **Assessment:** Please describe the local area's system for assessment and list the tools that are currently available.

Initial Assessments begin during the CCS session. It is recommended that all jobseekers attend a CCS to become members and access services at VWCC. During the CCS sessions, jobseekers are given an Individual Needs Assessment (INA) Worksheet and guided through process in completing that worksheet. The worksheet is a tool used by customers to identify services, resources, tools, workshops and/or referrals to community based organizations designed to assist them in meeting their employment goals. Jobseekers are instructed to bring the worksheet with them to their appointment with their Employment Advisor, DVOP and/or REA Review meeting for further assessment.

Initial Assessments are also conducted during the first meeting with Employment Advisor and DVOP to determine job readiness and/or necessity for referral to intensive services. All Initial Assessment information and services provided or recommended are documented in MOSES.

Initial Assessments are also conducted with job seekers interested in training services through the Path to Training workshop initiated at the VWCC on March 4, 2014. Customers first attend a presentation to learn about their potential eligibility for training funds and job search assistance through the Workforce Investment Act and then have the opportunity to meet briefly with a WIA Employment Advisor. Customers bring their resumes along with job search logs to the workshop. The goal of these workshops is to move each customer to the next appropriate step that will lead to suitable employment whether that is training, career counseling or core or intensive job search services.

Customers who based on the initial assessment in the Path to Training workshop or initial assessment through other points of service are identified as needing training or additional job search support are scheduled for a comprehensive assessment with a WIA Employment Advisor.

WIA Employment Advisors use the *Desk guide for Managing Referrals to Training and Intensive Services Job Search* in completing the comprehensive assessment. A comprehensive assessment must include all of the following components:

- Confirmation that Basic and Full screens are complete and that customer address and phone numbers are up to date. A brief description of the customer in MOSES notes for example: *" Sam is 25 year old single man living with his girlfriend and their two children. He lacks high school diploma; his last grade attended was 10th. He has worked in warehouses for past three years for short periods of time through staffing agencies. He is currently receiving UI. He has a driver license and car. "*
- A review of previous work history in MOSES (include jobs for last ten years): a brief summary in the description box includes the duties customer performed on the job. Explanation of circumstances if customer was fired or quit a job. Ensure that NAICS code, hours, benefits and reason for leaving are completed for each job record.
- Review the Education screen. Include educational history, did customer begin college but never complete a degree, document previous efforts to seek GED, any prior trainings and any credentials or licenses that the customer has gained including note on whether they are valid or expired.
- Enter customer's email address into MOSES.. If the customer does not have an email address, encourage them to obtain free email as offered through Yahoo, Google or Hotmail as this is a valuable job search tool and will enhance both their ability to job search effectively and the VW staff ability to provide timely case management.
- Job Match criteria should be reviewed with customer to be sure that it represents customer's actual skills and experience. Customer should be provided instructional handout to assist them in creating a profile on MJQ and how to upload their resume.
- Barriers to employment should be discussed and checked off in MOSES with brief note regarding how barrier is impacting customer's ability to obtain employment noted in description box and what actions are recommended to address barrier. For example:
 - Lack of transportation: does customer have car, license, permit, need any type of support service related to transportation (driver's education, mileage, and repair)?
 - Health: does the customer have limitations that impact employment options based on health concerns?
 - Housing: does the customer live in shelter or with relatives or friends, are they in danger of losing their housing?
 - Labor Market Discrimination: is the customer a mature worker or might they face any other form of discrimination in the workplace due to race, religion, sexual preference or disability?
 - Lack of Childcare/Eldercare: Does the customer require assistance in caring for children or elderly parent?
 - Financial: Does the customer face financial hardship due to long term unemployment, underemployment or other situation?
 - Legal: Does the customer have legal issue which might affect their ability to obtain employment?

- Limited Job Search Skills: has the customer been job searching without success and require assistance from VWCC; has the customer had limited experience job searching either because they have limited work experience or because they have worked at one employer for long period; does the customer lack knowledge and/or skills for conducting a successful job search (lack of computer skills, email, resume, etc.)?
- Work history: has the customer had a series of short term jobs or been out of work for extended period?
- Underemployed: has the customer accepted unsuitable employment due to financial hardship?
- Lack of Credentials, Certification, Licensing: Does the customer possess appropriate credentials for employment in desired field? Lack of appropriate education, GED or HS diploma; college degree if required for their occupation; license or certification required for their occupation; professional certificate that would allow them to better compete in the job market?
- Lack of marketable/occupational skills: Does the customer lack the skills required by the job market to obtain suitable employment?
- Customers testing below appropriate grade level: signifies that the customer is basic skill deficit based on TABE scores.
- Limited English proficiency: signifies that the customer is basic skills deficit and should be based on assessment test (BEST or TABE).
- Disability : The customer has produced documentation indicating disability as per eligibility checklist.
- Displaced Homemaker: MOSES notes must describe what documentation was used to determine eligibility.
- Homeless: Notes must describe what documentation was used to determine eligibility.
- Offender: Note must describe what documentation was used to determine eligibility.
- Pregnant/parenting issues: Note must describe what documentation was used to determine eligibility.
- Other: May be industry severely impacted by downsizing; customer who has history of not following through (dropped out of trainings in past, multiple no shows to appointments); or other situations which impacts customer's ability to obtain employment.

The WIA Advisor should determine whether the customer possesses marketable skills, but requires intensive services to overcome other significant barriers to employment or whether the customer does not possess marketable skills and requires additional training. This determination may require more than one appointment based on the level of assessment required. This determination will be based on assessment of the following elements: the customer's resume, previous job search efforts and results, and qualifications required by employers compared to customer's skill set.

MOSES notes should include the following information and documentation as appropriate added to customer file:

- ✓ Resume(s): Customer should have professional resume.
 - Review resume and determine if appropriate for job search. Does it summarize the customer's skills, is it up to date, is it formatted properly and has it been proofread. Resumes requiring revision, or improvements customer should be referred to resume workshop for feedback and resume revision assistance. If the resume needs revision, and the customer also lacks needed skills to compete in job market, add this comment to your assessment. Add task to work readiness case plan.
- ✓ Discuss job search: what has the customer done to date to seek employment. Description of job search should include responses to the following questions:

- What methods has the customer used in their job search? (Internet, applying in person, network, newspaper, agencies...)
 - What has been the intensity and results of the customer's job search efforts? (How many applications does the customer do per week? Do they follow up with the employer after applying for a job? How many interviews have they had? Does the customer use a cover letter? Has the customer been receiving assistance from VWCC or have they been using outplacement firms? What types of feedback do they receive from the interviews or peers in their occupation? Would the customer benefit from interview skills workshop?)
 - How long has the customer been seeking employment and are they applying for appropriate positions?
- ✓ LMI assessment to determine customer's marketability:
- Discuss the customer's occupation and the industry in which they have primarily worked. If the customer has skills and experience in more than one field, this assessment should indicate that the customer has sought to use all their current skills and experience to obtain employment prior to seeking training. Describe the current qualifications sought by employers for the customer's primary occupation(s) and relative growth or decline in the field/industry.

Based on your review of the customer's skills, experience and education along with those required by employers and the job search efforts made by the customer, summarize what you see as the skills barriers to employment faced by the customer in notes. Complete assessment field in case plan for customer's current occupation and cite reference sources. Print out the referenced material and include in customer file.
 - If customer has limited work history and/or job skills, the comprehensive assessment should also include completion of an interest profiler such as My Next Move or MACIS Interest Assessment.
 - Schedule TABE if anticipate customer will be referred to training and does not have college degree.
 - TORQ-The TORQ Assessment Tool is used to determine what transferable skills a customer may have that would be applicable in a new occupation or employment opportunity.

If applicable, please identify any tools that are being planned for the future.

Career Center staff has attended Peer to Peer training on Use of WorkKeys as Assessment tool and plan to utilize that tool once released by the State.

- c. **Required Partners:** Is each of the required WIA partners included in your One-Stop delivery system? If a required partner is not involved, please explain the reason. [WIA §112(b) (10) and 121(c)(2)(A)(ii)].

The following regional partners are in the One Stop System.

- 1) Department of Career Services
- 2) Massachusetts Rehabilitation Services
- 3) Department of Elementary and Secondary Education
- 4) Post Secondary/Vocational Education
- 5) Senior Community Service Employment (Volunteers)
- 6) Job Corps

The Mass Commission for the Blind and the Department of Mental Health are not located at the Career Center but are closely involved in a disability partnership group the ValleyWorks is represented in that meeting quarterly to discuss employment of individuals with disabilities. When necessary we make referrals to their agencies.

We have no established contact with the Community Service Block Grants and Housing and Urban Development. In FY15 we will try to strengthen our relationship with their partners.

- d. **MSFW:** States and local Career Centers have a responsibility under Wagner-Peyser regulations to provide services to Migrant Seasonal Farmworkers (MSFW) on a basis that is qualitatively equivalent and quantitatively proportionate to services provided to non-MSFWs. Please describe how employment services are provided to customers and how the Career Center will ensure that services to MSFWs are provided similarly.

ValleyWorks Career Center services both employers and MSFW job seekers. Our **Business Service Unit** outreaches to local farms prior to opening of farming season to market career center services including all job seeker services, employer services, Veterans, and youth services. In addition, ValleyWorks Career Center BSU informs employers of WOTC (Work Opportunity Tax Credit), WTFP (Workforce Training Fund), OJT (On-The-Job Training Program), HITG (Hiring Incentive Training), Work Sharing, and Rapid Response. Local farms are informed of Farm Labor Contractor registry and are provided a brochure with ValleyWorks Career Center BSU contact information. MSFW job seekers are welcome to utilize all facets at ValleyWorks Career Center. Employment Advisors' have been provided a "Desk Aide" to assist in servicing MSFW job seekers. During job seekers visit they are offered job ready guidance including but not limited to job matching, job development, labor market assessment, skills assessment, training exploration, WOTC, Work Opportunity Tax Credit, HITG, Hiring Incentive Training, FBP, Federal Bonding Program, and job ready enhancement (workshop and self taught computer program tutorials scheduling). CCS's include separate slide for MSFW information.

- e. **Individuals with Disabilities:** Please describe and assess your local area's delivery of services to people with disabilities.

- o What partnerships and collaborations exist to provide services to this population?

Entrances and access to services in the VWCC Haverhill and Lawrence sites are fully handicap accessible. The Career Center has the following equipment/software installed. Jaws, Kurzweil 1000 Scanner, Screen Magnification, TTY phone system, FM Wireless assistive listening devices, large key keyboards, and Lawrence also has a Braille printer. Both sites have power adjustable tables, and roller trackball mouse. Alternative media is available for testing and documents, including braille, and large print.

Staff at both sites have received training in the area of disability etiquette, the ADA, confidentiality, and use of adaptive equipment. The VWCC developed an online electronic referral guide for staff use to facilitate the referral process to needed services within our disability community partner system.

All workshops have been designed with an eye to accessibility. Appropriate accommodations can be made to allow universal access for individuals with disabilities to the center's many workshop offerings

As noted above, all the Adaptive Equipment listed is available to individuals with disabilities. In addition, the Career Center is a Member of the Board of the Merrimack Valley Partnership (MVP) and the recently developed Greater Merrimack Valley Employment Collaborative (GMVEC). This Collaborative formally convened in January of 2014 and its partners now include service providers and agencies from both the

Greater Lowell (GL) and Lower Merrimack Workforce Investment Areas (LMVWIA). The GMVEC Collaborative now incorporates the Merrimack Valley Partnership (MVP, the established disability collaborative of the LMWIA, with disability service providers of the Greater Lowell Region.

The GMVEC Collaborative is an Employment Collaborative model that receives its funding through the Department of Developmental Services (DDS). The coordination and facilitation of the Employment Collaborative is carried out through contracted resources provided by Riverside Community Care. The GMVEC partnership is part of a growing system of employment collaborative now being established in Massachusetts and is modeled after the Central Mass Employment Collaborative (CMEC). Both the MVP and GMVEC Collaborative partners provide employment and training services to individuals with disabilities..

Participating partners in GMVEC include State and Local Community Services agencies from both the GL and LMVWIA areas. The Steering Committee's composition represents the many disability service provider partners and includes representatives from the Department of Developmental Services, the Department of Mental Health, the Massachusetts Rehabilitation Commission, the Career Center of Lowell, Class Inc., Opportunity Works, Career Resources Corporation, the Point After Club, the Haverhill Club House, LifeLinks Inc., NuPath Inc., the Lowell CAR Team I, Essex North A CAR Team II, and American Training.

The VWCC will have additional representation in the Partnership in the area of Veteran services and will tie many regional and local services for Veterans to GMVEC's employment collaborative efforts in developing and sourcing employment opportunities for Veterans.

When required, the VWCC may call upon its partners for assistance in the assessment and coordination of service needs for the VWCC customer. Individuals with disabilities can access all core and intensive services the Career Center offers. The Career Center makes efforts to provide special accommodations when necessary.

- f. **Priority for Veterans and Other Eligible Persons (Covered Persons):** One-Stop Career Centers must incorporate priority of service for Veterans and eligible spouses in accordance with the provisions of TEN 15-10 (11/10/10). This requires Veterans and eligible spouses to receive service priority over recipients of public assistance and low-income individuals [WIA §§112(b)(17)(B) and 121(b)(1)(B)(1)]
- f1. How are you identifying "the point of entry" of federal employment and training programs in order for covered persons to take full advantage of priority of services?
- o Their entitlement to priority of service
 - o The full array of employment, training, and placement services
 - o Any applicable eligibility requirements for those programs or services.

Veteran's are identified at "point of entry" to ensure they take advantage of priority of services. Veteran's are given priority of service in all services they are eligible for within the career center. There are several areas within the career center where Veteran's Priority of Services is implemented:

New Veteran's are introduced to LV/DV by Customer Service Representative at the Membership Desk. If the LV/DV is not present, the new Veteran will be given a business card with contact information for the LV/DV and a copy of the membership application will be left for the LV/DV to make contact with the new Veteran. Veteran is given the choice to meet with an Employment Advisor in the Resource Room to begin employment services.

Veteran Services and contact information is also included in all Career Center Seminars as well as RES Group Sessions.

If a claimant self identifies as a Veteran to UI Online Navigator, the UI Online Navigator will personally introduce the Veteran to the LV/DV, if they have not already met.

Business Service Representatives have LV/DV contact information (business cards) and additionally have "Why Hire a Veteran" brochures (locally produced) with LV/DV contact information so when they meet with employers there is additional contact for advocating for Veterans.

Point of Entry for Veteran's Priority of Services may be determined at several access points:

- Membership Desk when becoming a new member and scheduling workshops
- UI Online Navigation area when filing claims, reopening claims and providing customer service
- During all Career Center Seminars and RES Group Sessions (slide presentations)
- Outreach events
- Referrals from external partners

f2. How are you ensuring that Covered Persons continue to receive the full advantage of Priority of Service in all employment, training and placement services "after point of entry"?

VWCC provides POS training to all staff on annual basis as well as updates throughout fiscal year to ensure that all staff maintains awareness of POS requirements as well as our processes and procedures. Managers review staff performance to ensure execution of POS at all points of services.

f3. How do you incorporate the monitoring and evaluation of priority of service within your current policies and procedures?

The Management Team periodically monitors all points of services throughout the Career Center to ensure that internal process/procedure is followed for Priority of Services.

f4. Does your area have exemplary examples of providing service to Covered Persons?
___Yes No If "Yes," please describe:

g. Service to Eligible Veterans: Please describe how are you ensuring that JVSG staff delivers intensive services and job-driven employment, training services to statutorily, and JVSG program identified eligible veterans and eligible persons?

As Veterans are identified at all Point of Entry, they are introduced to LV/DV and offered an appointment to return to meet with LV/DV to begin assessment for services and determine eligibility for JVSG program. Ops Manager utilizes Intensive Services Report, Veteran Activity Reports, Case Data Analysis Sheets as well as case conferences to ensure appropriate services are being provided to eligible Veterans and other eligible persons.

h. Service to Trade Customers:

h1. Please describe the steps that the local area takes to ensure that Trade Participants are able to meet their deadlines for TRA cash benefits eligibility.

The VWCC uses the following practices to ensure that Trade Participants are able to meet their deadlines for TRA cash benefits:

First, WIA Employment Advisors attend regular trainings to update their knowledge of Trade policies and work closely with the Trade Unit to address any foreseeable conflicts that would impact Trade participants. In addition, all Career Center staff are aware of the need to transition any job seeker who appears eligible for Trade benefits to WIA Employment Advisors as soon as possible.

In addition, due to recent TRADE changes all staff will be updated during staff meetings on deadlines under the 2002, 2009, 2011 and 2014 Acts to ensure that customers engaging in any point of service at career center will be provided information regarding deadlines under all the Trade Acts. Staff will also be made aware where they can locate information on MOSES to check if company is Trade approved and to know what impact date and expiration date refer to in MOSES. Job seekers laid off between those dates can submit 1666's. We will also look at different methods of posting lists of Trade approved companies in Resource Room, CCS, workshops, to staff so that any job seeker who may be eligible for Trade is identified as soon as they receive services.)

Job seekers who are new to the Career Center attend a Career Center Seminar (CCS). As part of the CCS, Trade is discussed and job seekers who may be eligible are referred to the membership desk to schedule an appointment with a WIA Employment Advisor. As a practice and when feasible, customers often complete a 1666 Trade Application for Benefits prior to their first appointment with staff. This process ensures the timely filing for Trade Benefits on the customer's behalf.

WIA Advisors complete the 1666 application if not already submitted and review benefits and deadlines under the Trade Act with the job seeker. They will then complete an assessment as described in Question 2. If the job seeker will require training in order to seek suitable employment, the WIA Advisor will move forward with training research and a request for training in accordance with the deadlines under Trade. WIA Advisors create a tickler in order to track pending 1666 applications and TRA deadlines. If there is an extenuating circumstance that is impacting the customer's ability to meet the TRA deadline, a waiver request will be submitted. WIA Advisors always document all contacts and attempted contacts with customers in MOSES so if a customer misses their deadline despite efforts of WIA Advisor, their efforts to attend to the TRA deadline are available for review. The WIA Operations Manager and the Philips Lightolier/Mersen NEG Manager use Crystal Reports to track Trade participants using the CC services to provide oversight to this process.

h2. Please describe the types of activities that are used to outreach to TAA Participants.

Potential Trade customers are outreached according to the process described in Question 5.

Rapid Response TAARRNEG reporting is compiled using a spreadsheet to track the dislocation, outreach activity, and Career Center service engagement of affected workers in order to ensure the timely filing of individual Trade Applications (1666) to apply for Trade Benefits in accordance with established Trade timelines.

In addition to the TAARRNEG report, the Career Center also utilizes the affected worker list found in MOSES that is listed under the Trade Petition Number for the dislocation. This method identifies workers within the service delivery area and in surrounding/adjacent regions impacted by the dislocation and provides an additional aid in outreaching affected workers who may want to receive services at the Career Center. Names of affected workers not identified through initial TAARRNEG reporting are added to the

outreach spreadsheet and contacted through outreach methods in order to engage in Career Center services and to ensure the timely application for Trade Benefits (1666).

3. Priority of Service to Low-Income Adults

- a. Please refer to MassWorkforce Policy #09-20, Attachment C "Priority of Services" for WIA Title I Adult funding. [20 CFR §663.200]. Please describe the process that is used by the board to determine whether or not WIA Adult funds are limited.

The MVWIB has determined that funding for priority populations identified in the WIA Adult allocation is not limited in the region at this point. Currently the number of adult participants in the region who are eligible for priority of services may receive services through WIA, DTA and other grants and programs provided through the MVWIB and VWCC. There is currently no limitation of services to this population due to lack of funding.

- b. If the board has determined that funding is limited and the low-income priority is in effect, please describe the process that gives priority for services to the recipients of public assistance and other low-income individuals. N/A
- c. If the board has determined that WIA Adult funds are not limited, please describe the process and criteria used to determine the expansion of eligibility requirements (including assurance that this will not affect services to the neediest populations).

As described in Section 2. Related to the One Stop Delivery System Process and Procedures all customers are effectively triaged and assessed to insure that they are provided with the activities and services necessary to transition from unemployment to a successful job placement.

4. Local Adult and Dislocated Worker Training Opportunities

- a. MassWorkforce policy #12-44, "Training Expenditure Requirement" requires that in a fiscal year, local Workforce Investment Areas ensure that at least thirty percent (30%) of formula-allocated program funds are expended on allowable training costs for the WIA Adult and Dislocated Worker programs, combined. This requirement does not include administrative expenditures. Please describe your local area's plan to meet the MA 30% training threshold requirement.

The MVWIB will allocate at least 30% of formula funding in WIA Adult and Dislocated Worker allocations for the provision of training allowable through the Act and approved by the MVWIB.

- b. Please describe the process used by your local area to administer Individual Training Accounts (ITA), including the parties responsible for ITA approval.

The Policy and process utilized by the MVWIB to administer and manage Individual Training Accounts in our region is delineated in the attached MVWIB Policy issued as of March 5, 2014. The significant changes in the policy are a change in the academic testing requirements as follows:

"All WIA eligible Youth will have average TABE scores (reading and math) at level 7.9 or higher. All WIA eligible Adults and Dislocated Workers will have average TABE scores (reading and math) at level 6.9 or higher. **Individuals who have clearly documented outstanding attendance, punctuality and prompt learning gains in regional WIA Title II ABE and ESOL programs may have slightly lower TABE scores.**"

o Does your local area impose any limitations on ITA funding? If yes, please describe.

The MVWIB has established a \$6000 cap for ITA training in all WIA categories.

- c. Is the local board currently providing or planning to provide training services that are made available as exceptions to the ITA process (Class-Sized (Group) Training, OJT, Customized Training, etc.)? [20CFR §663.430] If yes, please describe the plan and process used to procure and justify these exceptions and to deliver these services.

The MVWIB may utilize OJT and other allowable alternative training models as appropriate to meet the needs of area employers in specific employment areas in the region. These program models would be utilized following the regulatory and statutory requirements outlined by WIA and local and federal procurement and fiscal policies and practices.

5. Rapid Response Coordination

- a. Please provide a description of the local process for career center notification to the Regional Rapid Response Unit of any layoffs/plant closings.

The Rapid Response Coordinator issues a Service Delivery Area (SDA) notice of any layoff/plant closing to the Workforce Investment Board and the Career Center. In the event that the layoff/dislocation is impacted by Trade, Rapid Response assists employer/affected workers with the filing of a petition for Trade Certification.

Rapid Response then provides on-site services to employers and workers that are affected by layoffs/plant closings providing orientation services to workers regarding Career Center Services and Trade information. Affected workers are then referred to the Career Center in the region in which they reside for job search and training services. The list of workers impacted by the layoff/plant closing is then forwarded to the Career Center through the Trade Adjustment Assistance/Rapid Response/National Emergency Grant (TAARRNEG) report.

After receiving the (TAARRNEG) Notification, workers affected by the dislocation are outreached by the ValleyWorks Career Center (VWCC) via mail and informed about the services available to them. TAARRNEG notifications are also forwarded to VWCC staff to provide an additional phone contact to invite the referred customer(s) to the Career Center in order to use available services. Affected workers of companies that later become Trade Certified receive a letter from the TRADE unit informing them about the company's Trade Certification and are referred to a One-Stop Career Center to apply for TRADE services.

In addition to the TAARRNEG report that is received from Rapid Response, there are instances where no on-site Rapid Response services are delivered. In this case, the Rapid Response Program Coordinator shares information about dislocations and affected workers through email and/or in the form of lists or reports. This information is also coordinated at the Career Center level for direct mail and phone contact to affected workers for recruitment and service engagement with the Career Center.

There are a variety of ways that the Career Center notifies Rapid Response of any layoffs/plant closings. This could be by;

- 1) Employer contacts the Career Center,
- 2) Job Seeker from impacted company contacts the Career Center,

- 3) Articles in newspaper,
- 4) Contacts made to the Resource Service Unit, and
- 5) Employers contacting the Workforce Investment Board.

Once the Career Center hears about a potential layoff/plant closing we contact the Rapid Response Unit immediately.

- b. Please describe the process for career center business services staff to assist Rapid Response staff as needed on regional events.

The Business Services and the Rapid Response teams work in coordination to deliver business services at companies impacted by layoffs/plant closings. Business Services and Rapid Response work in collaboration to deliver on-site business services at employers including job fairs and recruitments for affected workers. Rapid Response team members participate in the development and delivery of employer services as an integrated member of the Business Service Unit at the Career Center. Rapid Response also provides the Career Center with periodic updates and reports regarding dislocation in the service delivery area and keeps staff informed about layoffs and dislocation in the region through the monthly Integrated Staff meeting at the Career Center. In addition, Rapid Response generates a monthly report for the career centers to review regarding companies experiencing layoffs/investigations in the state.

- c. Please identify the process for coordination with Rapid Response staff for Set Aside, National Emergency Grants and Trade related activities.

Potential Trade/Set Aside/NEG customers are outreached according to the process described above in 5(a).

In cases where the dislocation, layoff, or plant closing is impacted by Trade, or identified for Set Aside/NEG funding, Rapid Response TAARRNEG reporting is compiled using a spreadsheet to track the dislocation, outreach activity, and Career Center service engagement of affected workers in order to ensure the timely filing of individual Trade Applications (1666) to apply for Trade Benefits in accordance with established Trade timelines.

In addition to the TAARRNEG report, the Career Center also utilizes the affected worker list found in MOSES that is listed under the Trade Petition Number for the dislocation. This method identifies workers within the service delivery area and in surrounding/adjacent regions impacted by the dislocation and provides an additional aid in outreaching affected workers who may want to receive services at the Career Center. Names of affected workers not identified through initial TAARRNEG reporting are added to the outreach spreadsheet and contacted through outreach methods in order to engage in Career Center services and to ensure the timely application for Trade Benefits (1666).

Customers are also identified for Trade/Set Aside/NEGs through the Career Center Seminar (CCS). The Career Center maintains and updates a list of NEGs as part of the CCS presentation materials to assist CCS Facilitators and customers identify available services. Customers that are identified through the CCS as potential Trade/Set Aside/NEG are fast tracked to meet with Career Service Advisors and to apply for Trade Benefits. As a practice and when feasible, customers often complete a 1666 Trade Application for Benefits prior to their first appointment with staff. This process ensures the timely filing for Trade Benefits on the customer's behalf.

6. Expanding Business Engagement (EBE) Connection

- a. Please describe the local plan for Career Center staff participation in EBE regional Team Meetings, committees and events.

Currently there are five staff participating in the EBE regional team meetings. There are two BSR's that attend the Marketing Committee Meetings and a BSR, DVOP and Operations Manager that attend the Staff Training Committee. Each staff person is an active participant on the committee and provides updated information at our weekly BSR meeting so that all staff are up-to date as to the progress made in the committees that they are involved in.

- b. Please identify the local process to share information regarding business-related activities (e.g. job fairs, business forums) with Rapid Response staff.

The Rapid Response Team attends the regular weekly BSR Team meeting and participates in all our job fairs. The BSR team and Rapid Response staff continuously exchange information about company closings, change of employer services, updates of EBE meetings, job fairs and recruitments and upcoming BSR events.

An example of our working relationship with Rapid Response was demonstrated by the announcement of Southwick, an employer from Haverhill contemplating moving to North Carolina. Ken Messina, DCS Rapid Response Manager and the VWCC Executive Director contacted the Expanding Business Employment contacts in North Carolina inquiring about the different types of financial services the state offered to employers. We compared their financial incentives to what Massachusetts provides and sent the information to the Mayor of Haverhill, the Haverhill Economic Director and the DCS Director. We then convened a meeting with the Secretary of EOLWD, the MVWIB Executive Director, the Mayor of Haverhill, Haverhill Economic Development Director and MOBD. Currently Southwick is still located in Haverhill.

We have and will continue to work very closely with the Rapid Response team regarding Rapid Response Set Asides, NEG's and updated employer information.

- c. Please describe your local plan to ensure that Career Center business services staff attend EBE BSR-related trainings

Staff are totally engaged in attending the EBE BSR related training. Many of the VWCC staff will be attending the upcoming MA BIZWORKS June training. The VWCC Executive Director will also attend. The Executive Director continuously promotes the importance of this meeting with the BSR team as an important opportunity to engage in discussions with their peers, and gain a better understanding of the system and best practices. BSR's attending these meetings also share what they learned with others at these events.

7. Youth Services

- a. Please provide a description of the local area's WIA eligible youth population and needs, in general. [WIA §118(b)(6)]

The MVWIB has focused on creation of partnerships and collaborations between the workforce system, educational providers, and employers. As a result of coordination through these partnerships we have been able to better reach youth,

providing them with career readiness resources, training, and employment opportunities.

We align our programs (WIA, Connecting Activities (CA), Pathways, Year-Round and Summer YouthWorks, and BOG) to achieve more intensive programming and a seamless continuum of services that keep youth engaged in learning, work and career planning and in taking the educational steps needed to get and keep good jobs. A number of activities have focused on ensuring that the region's youth are receiving information and learning skills that are relevant to the future workplace, including educating school staff in the career pathways, job opportunities and workplace-specific skills required in the region's industries.

Jobs opportunities in the Merrimack Valley require training and/or post-secondary education. Taking this into consideration, we continue to strengthen our partnership with the area higher education institutions such as Northern Essex Community College (NECC), Middlesex Community College, Cambridge College, Merrimack College, and UMass Lowell. A NECC navigator is located at ValleyWorks Career Center, which facilitated and continues better access to information, resources and support information currently available at NECC.

The program design also ensures that youth are in contact with the staff throughout their WIA enrollment and workforce development experience. This provides continuity, builds a stronger support relationship, and creates more consistency and accountability. New initiatives are planned to facilitate new and better partnerships and collaborations between workforce development agencies, education and training organizations, and area employers to develop successful new career pathways for young people in our region.

Youth unemployment is at historical highs in Massachusetts and most of the US. It is even higher for the MVWIA's low-income minority youth. This situation has short and long-term consequences. In the short-term low income families have even less money and increased despair, more youth may also be drawn to crime. In the long term, youth will have less of the work experience needed to develop the foundational skills needed to keep jobs that allow them to grow economically and enter the middle class.

The MVWIA Chief Elected Official therefore created a campaign to systematically supplement Commonwealth Youth Works funding with private sector contributions - with the aim of doubling the number of area youth employed during the summer and later, year-round. The program began in FY 2014 and will be expanded in FY2015 with the aim of doubling Youthworks Summer Employment numbers first in Lawrence and then in this region's other two Youthworks cities – Haverhill and Methuen.

We are very proud to build these strong partnerships. It is rewarding to implement a program that reflects the Governor's workforce priority of strengthening youth education, training and employment to create a pipeline of new workers with the skills to succeed in our evolving economy.

b. Please provide a list of the entities that provide WIA youth services in the local region:

o Framework Services:

Objective assessment & Development of an Individual Service Strategy (ISS) – ValleyWorks Career Center
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o Pre-Employment Skills Training

Pre-Employment Skills Training Provider
ValleyWorks Career Center – Youth Programs, Haverhill High School, Lare Training Institute at Methuen High School, Notre Dame, Community Action, Lare Training Institute, Training Unlimited, Job Corps, Inc., Youthbuild

o ITA Training

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD FY 2014 VENDORS

MA #	Vendor	Provider ID
2014-01	American Red Cross of Mass Bay	1007997
2014-02	Benjamin Franklin Institute of Technology	1000802
2014-03	Boston Career Institute	1006181
2014-04	CAD Technical	1000917
2014-50	Cambridge College	1002238
2014-05	Center for Manufacturing & Technology	1022391
2014-49	Clean Edison	1021160
2014-06	Community Action, Inc.	1001946
2014-07	Construction Training LLC (Heavy Construction Academy)	1024040
2014-08	De Walt Institute/ dba Health Training Center	1002037
2014-09	Emmaus, Inc.	1003088
2014-10	Everblue Energy, Inc.	1020770
2014-11	Future Media Concept, Inc.	1004637
2014-13	HeatSpring Learning Institute	1023007
2014-15	Institute of Environmental Education	1002216
2014-16	John Mason Institute	1012805
2014-17	LARE Training Center/American Training Inc.	1001126
2014-18	Lawrence Training School	1005896

2014-19	Lincoln Technical Institute	1000817
2014-20	Middlesex Community College	1003133
2014-21	Millennium Training Institute, Inc.	1001928
2014-22	Minuteman Regional Vocational School District	1000888
2014-52	National Solar Trainers, LLC D/B/A NITE	1027580
2014-23	Network Technology Academy Institute	1009732
2014-24	New England Business Educational System, Inc.	1017916
2014-25	New England Institute of HVAC	1020688
2014-26	New England Tractor Trailer	1000760
2014-27	New Horizons Computer Learning Center	1002326
2014-28	New Horizons of New Hampshire	1002265
2014-29	North Shore Community College	1000872
2014-30	Northern Essex Community College	1000233
2014-31	Notre Dame Education Center	1022431
2014-54	Page School of Electrical Technology	1027842
2014-33	Peterson School	1000785
2014-35	Production Line Support Inc	1007012
2014-36	Quality & Productivity Solutions, Inc.	1003135
2014-37	Salem State University	1000696
2014-38	Salter School	1011658
2014-39	Seacoast Career School	1007508
2014-41	Training Unlimited, Inc.	1000610
2014-42	UMass Lowell	1000826
2014-43	Universal Technical Institute	1014841
2014-45	Wentworth Institute of Technology	1000921
2014-46	William George Associates	1007507
2014-47	Worcester Polytechnic Institute	1003076

o Each of the Ten Program Elements [WIA §129(c)(2); 20 CFR §664.410]

Required Ten Element Youth Service Being Provided	Name of Required Ten Element Youth Service Provider
Tutoring, Study Skills training and Instruction	Haverhill High School, Lawrence High School, Methuen High School, Phoenix Academy
Alternative Secondary School Services	Phoenix Academy, Job Corps, Inc., Youthbuild
Summer Employment Opportunities	ValleyWorks Career Center (YouthWorks Program)
Paid and Unpaid Work Experience (including internships and job shadowing)	ValleyWorks Career Center (Connecting Activities, BOG, YouthWorks Programs), Haverhill High GLTS, LHS, Whittier Technical HS, American Training at Methuen High School
Occupation Skills Training	Valley Works Career Center
Leadership Development Opportunities	Haverhill High School, Lawrence High School, Boys & Girls Club of Lawrence
Supportive Services	ValleyWorks Career Center
Adult Mentoring	United Way, Inc., Northeast Behavioral Health (Lahey Clinic), South Bay Mentoring Services
Follow up services	ValleyWorks Career Center
Comprehensive Guidance and Counseling	The Psychological Center, Arbour Counseling Services, Family Services Inc.,

- c. Please refer to MassWorkforce Policy #10-42 "Locally Defined Additional Youth Barriers." Please identify any additional barriers currently utilized or planned, describe the WIB/Youth Council process for approval of those barriers as well as the documentation that will be used to verify the barriers.

The following portion of the MVWIB Youth policy which has been reviewed and approved by the Division of Career Services delineates the "Locally Defined Additional Youth Barriers" and required documentation approved by the MVWIB Board and Youth Council in 2010 and amended as indicated in Attachment A in 2012.

Youth Requiring Additional Assistance Policy

PURPOSE: This transmits the statutory and Merrimack Valley Workforce Investment Board (MVWIB) requirements and criteria for the determination of eligibility for youth for services by all entities receiving funds provided through Title I of the Workforce Investment Act as amended by the Merrimack Valley Workforce Board on October 5, 2010.

BACKGROUND: Section 101(13) of the Workforce Investment Act (WIA) establishes the statutory eligibility criteria for youth. To be eligible for WIA Title I services, a youth must generally meet both the age and low income* requirements and must also fall into one of six youth eligibility categories.

Section §101(13) identifies the six (6) barriers that may be considered for eligibility. These are:

- 1) Deficient in basic literacy skills,
- 2) A school dropout,
- 3) Homeless, a runaway, or a foster child,
- 4) Pregnant or a parent,
- 5) An offender, and
- 6) An individual who requires additional assistance to complete an educational program, or to secure and hold employment.

This criteria is further defined as youth that

- A) are one or more grade levels below his/her age-appropriate grade level;
- B) Have a disability, including a learning disability; or
- C) Require additional assistance as defined by the Youth Council and approved by the local board. (Long term unemployment may not be used as a criterion to meeting this definition of eligible youth.) The ability of LWIB's under WIA to establish such "additional barriers" provides local areas with the flexibility to adapt the WIA Title I Youth Program to unique local conditions and to identify specific local barriers that relate to the ultimate achievement of the local strategic goals and priorities. (20 CFR 664.200(c) (6)).

JUSTIFICATION: The MVWIB added five additional criteria for use in determining WIA eligibility for economically disadvantaged youth requiring additional assistance. Many youth in the MVWIB region face significant barriers to employment and future success that

are not covered in the existing criteria. Given that the youth unemployment rate is at historic highs the importance of access to activities that provide career exploration, skill building and occupational training preparation is critical for future success. The addition of these five criteria will allow opportunity for more youth who are making, or who have made, the effort to stay and learn in school. It is hoped that this change will help reduce the inner-city drop-out rate and increase the employment rate for inner city youth.

In keeping with the authority of the MVWIB to establish additional barriers as described in C) above the development of locally determined additional barriers as described in WIA 101(13) (VI) will be implemented in a manner consistent with the Act establishing a clear definition a verifiable methods of documentation for each additional barrier.

Additional Barriers:

The Merrimack Valley Workforce Investment Board has determined that in addition to the required criteria outlined in WIA Section 101 (13) the “Youth Requires Additional Assistance” definition will be expanded to include :

- 1) An individual who is currently unemployed and has held at least three jobs for less than 45 days each within the last year, or,
- 2) A State involved youth**
(*local barriers 1 and 2 have been in effect since January 2010*) or,
- 3) A Youth Living in a Designated Census Tract Poverty Area (as designated by the Commonwealth of MA, City of Lawrence or other data source); or,
- 4) A Youth who Resides in a non-traditional household setting (single parent, lives with unofficial guardian, latchkey, grandparents, or domestic partners.); or,
- 5) A Youth Living in Public Housing.

**State-involved is defined as any youth receiving any type of services from a state agency/entity.

Attachment A to this policy delineates documentation requirements for each of the barriers included under “Youth Requires Additional Assistance”.

ACTION

REQUIRED: Staff of the Merrimack Valley Workforce Investment Board, ValleyWorks Career Center, and all sub-recipients responsible for determining eligibility for WIA Title I Youth activities will adhere and execute the policy decisions and processes outlined in this policy.

EFFECTIVE: October 5, 2010

ATTACHMENT: Addendum Attachment A- Youth Eligibility Documentation for Youth Requires Additional Assistance criteria meeting income eligibility

ADDENDUM ATTACHMENT A

Required Youth Eligibility Documentation for Youth who require Additional Assistance and who meet the minimum income criteria.

<p>Is one or more grade levels below their age- appropriate level</p>	<p>To prove a customer’s age:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Baptismal Record <input type="checkbox"/> Birth Certificate <input type="checkbox"/> DD-214, Report of Transfer or Discharge Paper <input type="checkbox"/> Driver’s License <input type="checkbox"/> Federal, State or Local Government Identification Card <input type="checkbox"/> Selective Service Card <input type="checkbox"/> Hospital Record of Birth <input type="checkbox"/> Passport <input type="checkbox"/> Public Assistance /Social Service Records <input type="checkbox"/> School Records/Identification Card <input type="checkbox"/> Letter from Commonwealth of Massachusetts EOHHS Agency (for Foster Child and State Custody Youth, only) <p>To prove assessed grade level in reading or math:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Assessed by a Generally Accepted Standardized test
<p>Has a disability, including a learning disability</p>	<p>Refer to Individuals with Disabilities in Workforce Issuance No. 09-20 under Youth Eligibility Barriers</p>
<p>LWIB Defined and Approved Barrier</p> <p>A currently unemployed youth who has held three or more jobs for less than 45 days within the past 12 months</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Pay Stubs from last three (3) jobs <input type="checkbox"/> Applicant Statement (must be supported with corroborative contact or reliable witness)
<p>LWIB Defined and Approved Barrier</p> <p>“State involved”, means any state agency entity providing services to the youth.</p>	<ul style="list-style-type: none"> <input type="checkbox"/> DTA verification <input type="checkbox"/> Letter from DCF or DYS signed by caseworker <input type="checkbox"/> Document (letter, etc.) from the state agency confirming the provision of services. AGENCIES: DCF, DYS, DMH, DTA, DMR, MRC, Veteran’s Affairs
<p>LWIB Defined and Approved Barrier</p> <p>Youth Living in a Designated Census Tract Poverty Area</p>	<ul style="list-style-type: none"> <input type="checkbox"/> As documented by city, state or federal documentation of high poverty designation for applicant’s resident address (example: www.factfinder.census.gov/) Please see attached instructions
<p>LWIB Defined and Approved Barrier</p> <p>Youth living in a non-traditional household:</p>	<ul style="list-style-type: none"> <input type="checkbox"/> As documented by birth certificates, decree of court, divorce decree, lease or landlord statement, medical card, most recent tax return supported by IRS documents, Public Assistance/Social Service/ Public Housing Agency Records.

<ul style="list-style-type: none"> • single parent, • unofficial guardian, • foster parent(s), • grandparent(s) or other relative, • domestic partners • Is a “latchkey child” (a school-aged child who lives with working adults and must spend part of the day unsupervised), 	<input type="checkbox"/> Applicant Statement (must be supported with corroborative contact or reliable witness)
<p>LWIB Defined and Approved Barrier</p> <p>Youth Living in Public Housing</p>	<input type="checkbox"/> As documented by an authorized public housing authority on their letterhead.

Please be advised that the Merrimack Valley WIB’s Planning Committee has delegated authority from the full Board. The MVWIB’s Planning Committee approved the below written addition to our regional WIA youth eligibility criteria.

“Income-eligible in-school youth with less than a 2.0 GPA as indicated on an official school report or transcript shall be eligible for WIA-subsidized training.”

The motion and its approval will be reflected in meeting minutes but the change became effective today Wednesday, October 24, 2012.

<p><i>Income-eligible in-school youth with less than a 2.0 GPA</i></p>	<input type="checkbox"/> Official School Report or Transcript
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8. Public Review and Comment

Please provide a statement that describes the local public review and comment process.

The MVWIB’s FY 2015 guiding principles and FY 2015 draft budget were posted on the MVWIB website and legal notices notifying the public of the same were emailed to all regional municipal clerks for public posting. Interested parties were invited to visit the MVWIB offices to review all related draft documents in hard copy. Any one could submit written or emailed comments to the MVWIB Executive Director. A three-week public comment period was instituted till noon, July 2010.

SUMMARY OF CHANGES FROM FISCAL YEAR 2014 TO FISCAL YEAR 2015

FUNDING ALLOCATIONS

<u>ALLOCATED FUNDING</u>	<u>\$ Increase/(Decrease)</u>	<u>% Increase/(Decrease)</u>
WIA Youth	\$61,121	9.58%
WIA Adult	\$48,634	8.11%
WIA Dislocated Worker	\$54,274	8.45%
WIA Administration	\$18,226	8.73%
Wagner Peysers	\$6,459	1.21%
Department of Transitional Assistance	\$10,081	32.56%
ReEmployment Eligibility Assessment	\$6,587	3.00%
UI	(\$35,627)	-6.80%
Career Center One Stop	\$41,321	19.04%
Trade Case Management	(\$63,059)	-54.31%
Summer Youthworks	\$114,641	23.98%
<u>FY15 NEW FUNDING</u>		
Philips Mersen NEG	\$677,602	
Dislocated Worker Training NEG	\$124,583	
NECC Project Pathway	\$20,400	
Workforce Competitive Trust Fund Mfg	\$21,000	
STEM Clean Energy	\$45,640	

TRAINING FUNDS

<u>WIA CUSTOMER TRAINING & SUPPORT FUNDS</u>	<u>% Of FY14 WIA Program Allocation to Customer Training and Support</u>	<u>% Of FY15 WIA Program Allocation to Customer Training and Support</u>
WIA Youth	27%	27%
WIA Adult	26%	30%
WIA Dislocated Worker	26%	31%
<u>% Variance Of FY15 Allocation to Customer Training and Support From FY14</u>		
	WIA Youth	0%
	WIA Adult	4%
	WIA Dislocated Worker	5%
<u>\$ Of FY15 Allocation to Customer Training and Support</u>		
<u>WIA CUSTOMER TRAINING & SUPPORT FUNDS</u>	<u>\$ Of FY14 Allocation to Customer Training and Support</u>	<u>\$ Of FY15 Allocation to Customer Training and Support</u>
WIA Youth	\$173,059	\$190,839
WIA Adult	\$156,336	\$196,893
WIA Dislocated Worker	\$167,036	\$212,425
<u>\$ Variance Of FY15 Allocation to Customer Training and Support From FY14</u>		
	WIA Youth	\$17,780
	WIA Adult	\$40,557
	WIA Dislocated Worker	\$45,389
TOTAL		\$103,726

STAFFING

<u>Entity</u>	<u>Effective Date</u>	<u>Status of Position</u>
<u>Merrimack Valley Workforce Investment Board</u>		
(2) Summer Youth Counselors	September 30, 2014	Positions End
Senior Planner	August 25, 2014	Vacant Position to be posted; anticipated start date
<u>Division of Grants Administration</u>		
Financial Accountant	June 9, 2014	New Hire
<u>ValleyWorks Career Center</u>		
Assistant Career Center Director	August 25, 2014	Vacant Position to be posted; anticipated start date
Outreach Worker	August 25, 2014	Vacant Position to be posted; anticipated start date
Bilingual Resource Room Assistant	August 25, 2014	Vacant Position to be posted; anticipated start date
Business Services Representative	August 25, 2014	Vacant Position to be posted; anticipated start date
Bilingual Workshop Specialist	August 25, 2014	Vacant Position to be posted; anticipated start date
Project Coordinator	August 25, 2014	Vacant Position to be posted; anticipated start date
<u>Department Of Career Services</u>		
Job Specialist III	Fiscal Year 2015	Vacant Position for additional FTE Veteran
Employment Services Representative	Fiscal Year 2015	Vacant Position from Retired Staff

In addition to the above WIA Training Funds, FY14 Training Funds for Trade Eligible Customers paid by the State was \$1,181,129. The Department of Career Services retains the funding to support Customer Training for Trade Customers.

FISCAL YEAR 2015 BUDGET

	% of MVWIB		% of DGA		% of VWCC		% of DCS			% of Total Funds	
	TOTAL Funds	Funds	TOTAL Funds	Funds	TOTAL Funds	Funds	TOTAL Funds	Funds	TOTAL Funds	TOTAL Funds	Funds
	Merrimack Valley Workforce Investment Board (MVWIB)		Division of Grants Administration (DGA)		ValleyWorks Career Center (VWCC)		Department of Career Services (DCS)		TOTAL Funds		
									Training/ Customer Support Funds		
Expenses											
(1 & 2) Salary & Fringe	\$515,899	81.41%	\$337,445	64.25%	\$2,370,259	87.58%	\$1,289,617	76.72%		\$4,513,220	61.53%
Independent Contractor 1099	\$11,783	1.86%	\$0	0.00%	\$0	0.00%	\$0	0.00%		\$11,783	0.16%
Premises	\$32,029	5.05%	\$22,187	4.22%	\$164,801	6.09%	\$86,304	5.13%		\$305,321	4.16%
Insurance & Bonding	\$7,499	1.18%	\$4,000	0.76%	\$13,570	0.50%	\$10,428	0.62%		\$35,497	0.48%
Travel & Transportation	\$10,077	1.59%	\$3,600	0.69%	\$15,150	0.56%	\$0			\$28,827	0.39%
Equipment Rental & Maintenance	\$6,749	1.06%	\$9,574	1.82%	\$18,155	0.67%	\$26,408	1.57%		\$60,885	0.83%
Expendable Supplies	\$8,700	1.37%	\$4,800	0.91%	\$22,251	0.82%	\$30,131	1.79%		\$65,882	0.90%
Telephone	\$7,721	1.22%	\$2,690	0.51%	\$21,627	0.80%	\$11,915	0.71%		\$43,952	0.60%
Postage	\$400	0.06%	\$4,000	0.76%	\$6,295	0.23%	\$3,061	0.18%		\$13,756	0.19%
Advertising	\$1,000	0.16%	\$0	0.00%	\$450	0.02%	\$0			\$1,450	0.02%
Dues & Subscriptions	\$9,999	1.58%	\$1,500	0.29%	\$6,359	0.23%	\$1,204	0.07%		\$19,062	0.26%
Printing & Reproduction	\$600	0.09%	\$3,000	0.57%	\$7,897	0.29%	\$7,285	0.43%		\$18,782	0.26%
Furniture and Equipment										\$0	0.00%
Information Technology	\$4,029	0.64%	\$2,239	0.43%	\$17,316	0.64%	\$9,087	0.54%		\$32,671	0.45%
Vendor Service Fees	\$300	0.05%	\$15,000	2.86%	\$5,768	0.21%	\$190,478	11.33%		\$211,546	2.88%
Conferences & Meetings	\$8,749	1.38%	\$5,000	0.95%	\$4,500	0.17%				\$18,249	0.25%
Refreshments	\$4,000	0.63%	\$750	0.14%	\$7,238	0.27%	\$1,371	0.08%		\$13,359	0.18%
Data Circuit Costs	\$241	0.04%	\$134	0.03%	\$964	0.04%	\$535	0.03%		\$1,874	0.03%
MOSES Fees	\$3,962	0.63%	\$1,321	0.25%	\$23,774	0.88%	\$13,208	0.79%		\$42,264	0.58%
Unemployment										\$0	0.00%
(3) G.I.C. Retirees			\$108,000	20.56%						\$108,000	1.47%
Customer Training									\$1,754,568	\$1,754,568	23.92%
Needs Related and Supportive Services									\$34,067	\$34,067	0.46%
Total Expenses	\$633,736	100.00%	\$525,239	100.00%	\$2,706,372	100.00%	\$1,681,031	100.00%	\$1,788,635	\$7,335,013	100.00%
% of Budget	8.64%		7.16%		36.90%		22.92%		24.38%		
# of FTE's	6.85		4.40		35.60		19.40			66.25 FTE's	

Notes:

(1) Staffing Costs for the MVWIB, DGA, & VWCC include a 2.5% Union COLA.

(2) Staffing Costs for the DCS include a 3.5% increase for Job Specialist III's.

(3) G.I.C. Retiree Costs are Dental & Health Care Costs for Retired Staff that are paid by the Agency. These costs are currently budgeted under the DGA and will be paid from FY15 WIA Funds.