



**Northern Middle Tennessee  
Workforce Board Inc.**

## **Special Populations**

### **Committee**

**February 8, 2024**

**11:00 A.M.**

[Click here for Zoom link](#)

Meeting ID: 834 9354 5494

Passcode: 884126

Telephone Number: +1 312 626 6799

## **Agenda**

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### **Welcome**

### **Call the Meeting to Order**

### **Approval of Minutes**

### **Business Reports:**

1. Career Service Provider Update
2. Federal Report
3. Target Populations
  - a. Employer Business Engagement Plan Grant Update
  - b. Youth
4. Trends – ESL Students
5. WIOA Plan

### **Adjourn**

#### **Members:**

Corey Johns  
Christopher West  
Freda Herndon (Chair)  
George “Bo” Callis  
James Harper  
Ginger Jarrett  
Nathan Garrett

**Complete zoom link:** <https://us02web.zoom.us/j/83493545494?pwd=b3lwb1R0QXovMkZKQWxlZyt2a0lzQT09>



**Northern Middle Tennessee Workforce Board  
Special Populations Committee  
Meeting Minutes  
August 4, 2023, via Zoom at 11:00 a.m.**

<b>Members Attending</b>	<b>Members Absent</b>	<b>Staff &amp; Guests Attending</b>
Chris West	Corey Johns	Marla Rye
Dr. Lynn Seifert	James Harper	Andrea Dillard
George “Bo” Callis		Meagan Dobbins
Ginger Jarrett		Kim Rye
Dr. Arrita Summers		Ginger Fussell
Kristi Spurgon		Sherry Maynard

The Northern Middle Tennessee Workforce Special Populations Committee met via Zoom on May 4, 2023, at 11:00 a.m..

After a quorum was established, Lynn Seifert requested a motion to approve the minutes. Bo Callis motioned, and Ginger Jarrett seconded. With no further discussion, the minutes were approved.

**Career Service Providers**

Andrea Dillard began by updating the committee regarding the contractors’ performance. EDSI achieved its enrollment goal for adult/dislocated workers and youth cumulatively. Because of the high carryover numbers, the contractors got when they took over, they were given the exit goal that 80% of total new enrollments need to be exited. EDSI did not meet the exit goal throughout all four quarters. While they did well enrolling participants, they were not timely exiting them to employment. This could be attributed to the large turnover with staffing. They met the adult/dislocated worker exit goal cumulatively but not the youth exit goal. The adult/dislocated worker exit goal was probably met because of receiving the NEG grant. They aimed to enroll 61 NEG workers, and they enrolled 313. The contract ended on June 30. When the grant ended, these participants were exited. Only 60-65 of 221 exited were placed in employment. 92 were carried over into the regular program. They did not meet the Positive Exit Rate goal for adult/dislocated worker or youth. Exiting participants positively to employment continues to be an issue. They exceeded the placement wage goal for both categories.

Andrea went on to review MAC's performance. Cumulatively MAC has met their enrollment and exit goals for youth. Of 132 exits, 99 of them were positive. This gives them a placement rate of 75%, which does not meet the 80% goal. Andrea expressed that she felt they could continue working and meeting the goals set for them.

### **Federal Performance Measures**

Andrea informed the committee that all WIOA Federal Reporting Score Card performance measures have passing scores of either 90% or 100%. Quarter 4 shows the estimated scores that will be finalized, and those are all passing. A predictive report was run for the first quarter of the new fiscal year and shows passing scores. These scores are from participants who exited the program a year ago. The current issue of having high caseloads with participants who need to be exited and may not be working will affect our performance outcomes in the future.

### **Business and Industry Service**

Andrea reported that the Incumbent Worker Training Grant trained 332 participants, and of the \$300K funds designated, \$214K was expended. Just over \$194K was designated for Apprenticeship Training, and all funds were spent training 114 employees. Several employers have already requested funding for the new year. Marla asked the committee for their support in giving priority is to first-time applicants. She felt this would give other companies a chance for upskilling their existing workforce. The interest in IWT is growing. The interest in apprenticeship programs is growing as well. The programs are evaluated for their effectiveness. The committee expressed their support in giving new applicants priority.

### **Target Grants**

Andrea then updated the Board regarding the Summer Youth Employment Program, which is state-funded. This employment opportunity is for youth ages 14-24. Phase 1 ends on August 30, 2023 and phase 2 end on August 30, 2024. Phase 1 has 124 youth enrolled and phase 2 has 228 for a total of 328 youth enrolled in the program. Northern Middle are serving more youth than the other eight workforce areas combined. Enrollments have paused for now so there will be money available for employment during the spring and summer of 2024. It was pointed out that Houston and Humphreys County have 34 kids working in each county, which is a lot for those small counties. The youth have been placed in both public and private sectors. About 100 youth are working in Montgomery County in both public and private sectors. Efforts were made to match youth with their interests.

### **WARN Reports**

Andrea shared with the committee the WARN Notice which details closures/layoff activities of businesses in the Northern Middle Workforce Area. The notice presented happened between January and July of this year. Almost 1,300 workers have been affected. In previous years advanced notice has been given but currently notice might happen the day of the layoff which doesn't leave time to meet with employees.

Andrea then informed the committee that the flood grant for Humphreys county is ending. She felt the grant was a big help to the county as well as individuals. Some participants in the grant were moved into permanent employment.

### **Adjourn**

Marla reminded them that the next Board meeting would be on August 9, 2023, at the Highland Crest Center in Springfield. Lynn Seifert adjourned the committee meeting.

EDSI 23-24 Incentive Quarterly Benchmarks										
Matrix:		2023						2024		
		Sep 30 (QTR 1)			Dec. 30 (QTR 2)			Cumulative June 30		
		Goal	Actual	%	Goal	Actual	%	Goal	Actual	%
Enrollments	A/DW	210	301	143.33%	250	125	50.00%	1000	426	42.6%
	Total Youth	69	114	165.22%	80	23	28.75%	322	141	43.8%
	In-School	14	7	50.00%	21	4	19.05%	76	11	14.4%
Exits (80% of enrollments)	A/DW	168	75	44.64%	200	197	98.50%	800	361	45.1%
	Youth	55	55	99.64%	64	59	92.19%	258	143	55.5%
		Goal	Actual	Percent	Goal	Actual	Percent	Goal	Actual	Percent
Positive Exits # (85% of Exits)	A/DW	143	67	46.92%	170	184	108.2%	680	327	48.1%
	Youth	47	54	115.09%	54	58	106.6%	219	140	63.9%
		Exits	Positive	Percent	Exits	Positive	Percent	Exits	Positive	Percent
*Actual Positive Exit Rate	A/DW	75	67	89.33%	197	184	93.4%	361	327	90.6%
	Youth	55	54	98.18%	59	58	98.3%	143	140	97.9%
		Goal	Actual	Percent	Goal	Actual	Percent	Goal	Actual	Percent
Placement Wage	A/DW	\$ 16.50	\$ 21.75	131.82%	\$ 16.50	\$ 22.36	135.5%	\$ 16.50	\$ 22.20	134.5%
	Youth	\$ 13.00	\$ 17.20	132.31%	\$ 13.00	\$ 16.01	123.2%	\$ 13.00	\$ 16.46	126.6%

## MAC Goals 2023-2024

Matrix:		2023						2024		
		Sep 30 (QTR 1)			Dec. 30 (QTR 2)			Cumulative June 30		
		Goal	Actual	%	Goal	Actual	%	Goal	Actual	%
Enrollments	ISY	20	32	160%	14	9	64.29%	62	41	66.1%
	OSY	15	28	187%	21	21	100.00%	77	49	63.6%
	Total	35	60	171%	35	30	85.71%	139	90	64.7%
Exits (80% of enrollments)										
	Youth	28	49	175%	28	49	175.00%	111	103	92.6%
Positive Exits		Goal	Actual	Percent	Goal	Actual	Percent	Goal	Actual	Percent
	Youth	24	27	88.1%	24	44	184.9%	95	77	81.5%
*Actual Positive Exit Rate										
		Exits	Positive	Percent	Exits	Positive	Percent	Exits	Positive	Percent
	Youth	49	27	55.1%	49	44	89.8%	103	77	74.8%
Placement Wage										
	Youth	\$ 13.00	\$ 16.80	129.2%	\$13.00	\$17.53	134.8%	\$13.00	\$ 17.25	132.7%

**WIOA Federal Reporting Score Card  
NORTHERN MIDDLE WORKFORCE BOARD**

PY23 WIOA Core Performance Measures	Targets 100%	Targets 90%			
			Q1 PY 23	Q2 PY 23	Q3 PY 23
Adult Measures			PASS	EST	EST
Exiters			514		
Participants Served			1857		
Employment Rate 2nd Quarter after exit	81.5%	73.35%	85.2%	82.2%	78.0%
Employment Rate 4th Quarter after exit	81.0%	72.90%	86.1%	81.0%	74.3%
Median Earnings 2 <sup>nd</sup> Quarter after exit	7,025	\$ 6,323	\$ 8,678	\$ 8,678	\$ 8,678
Credential Attainment w/in 4 Quarters after exit	69.5%	62.55%	72.2%	73.8%	76.3%
Measurable Skills Gains	63.5%	57.15%	64.7%	69.1%	67.3%
Dislocated Worker					
Exiters			169		
Participants Served			627		
Employment Rate 2nd Quarter after exit	83.5%	75.15%	87.9%	84.3%	81.4%
Employment Rate 4th Quarter after exit	81.0%	72.90%	86.2%	85.1%	76.3%
Median Earnings 2 <sup>nd</sup> Quarter after exit	7,944	\$ 7,150	\$ 10,753	\$ 10,304	\$ 10,222
Credential Attainment w/in 4 Quarters after exit	65.5%	58.95%	68.5%	68.5%	67.5%
Measurable Skills Gains	61.2%	55.08%	70.0%	75.6%	69.5%
Youth					
Exiters			420		
Participants Served			1203		
Employment Rate 2nd Quarter after exit	78.0%	70.20%	89.5%	86.7%	81.4%
Employment Rate 4th Quarter after exit	77.0%	69.30%	87.50%	84.9%	76.7%
Median Earnings 2 <sup>nd</sup> Quarter after exit	3,800	\$ 3,420	\$ 5,874	\$ 6,171	\$ 6,030
Credential Attainment w/in 4 Quarters after exit	65.5%	58.95%	75.1%	74.0%	78.1%
Measurable Skills Gains	55.0%	49.50%	56.6%	59.7%	57.6%
GREEN-Passing at 100% of Goal					
YELLOW-Passing at 90% of goal					
Red-Failing at less than 90% of goal					



# **Business Engagement Plan**

**Tennessee Department of Labor and Workforce  
Development**

**Division of Workforce Services**

# Business Engagement Plan

## Executive Summary

The overarching mission of the Tennessee Department of Labor and Workforce Development (TDLWD) is to advance workforce development and improve workplace safety. Within this mission, TDLWD recognizes that strong relationships with businesses and a solid workforce pipeline are vital to support industry needs. This Business Engagement Plan seeks to prioritize Tennessee employers as workforce system “customers” by building business consulting relationships, confidently projecting a value proposition, and customizing programs and benefits available. To better serve our employer customer, this infrastructure will create a state-wide business services model for TDLWD staff and external LWDA partners to implement and provide a consistent approach of streamlined solutions.

### ASSESSMENT OF NEED:

Our current approach to business engagement faces multiple challenges, both external and internal. The premier external challenge is a unique post-pandemic workforce that boasts low unemployment rates, yet also suffers from low labor force participation. The ability to adapt requires an agile system that is strategically positioned to provide solutions to business and industry. At the direction of the TDLWD Commissioner, the Division of Workforce Services was challenged with developing a Business Engagement Plan that presented an innovative restructure to provide this adaptability. Development of this plan begin with assessing current business engagement strategies to include evaluation of service delivery and feedback from employers. This assessment revealed multiple internal challenges identified through state and local partners- including Regional Directors, Local Workforce Development Board Executive Directors, and Business Services staff. Additionally, the Commissioner’s Office issued a Business Industry Survey throughout the state to identify challenges from the employer perspective. Insights gained have summarized our internal challenges into six (6) overarching themes:

- Insufficient System Alignment and Coordination
- Absence of Strategic Aligned Vision (State, Regional, and Local levels)
- Need for Improved Communication
- Inadequate Service Delivery
- Necessity for an Effective Customer Relationship Management (CRM)



- Need for Skill Development and Training

Below is a summary of each of the six identified internal challenges this Business Engagement Plan will seek to address:

### **1. Insufficient System Alignment and Coordination**

Enhanced coordination is necessary to create a less cumbersome environment for employers. The current system's lack of coordination between entities (Central Office Business Services staff, AJC Business Services Teams, Apprenticeship Office, Regional Councils, and Local Workforce Development Areas), has resulted in employer confusion and fatigue.

### **2. Competing Strategic Visions (State, Regional, and Local levels)**

A consistent state-wide strategy for business engagement is needed. Varying strategies at system levels have resulted in disjointed efforts and multiple areas of focus. The state workforce system would benefit from a “blueprint” model approach to engaging employers and providing business services. Creating a repeatable blueprint would allow for regional and local level initiatives while still providing a consistent infrastructure for vision, approach, and delivery.

### **3. Need for Improved Communication**

Lack of a consistent and intentional approach to communicating with businesses has hindered effective business engagement. Establishing a consistent message projected from all levels will be crucial to our success. Improved communication should demonstrate the ability to both listen and speak to our employer customers so that we can best analyze their needs and inform of tailored solutions. Emphasizing the marketing of all available services into one portfolio and approaching employers with a unified message will lead to improved communication.

### **4. Inadequate Service Delivery**

The current service delivery model lacks value-added services for businesses, leading to employer fatigue and overlooked referrals made to the American Job Centers (AJCs). Employers have expressed dissatisfaction with American Job Center (AJC) in-kind services, highlighting the need for a comprehensive approach to service delivery. Effective strategies should address the disconnect between State staff, Local Board Business Services staff, One-Stop Operators, and AJC staff, thereby fostering a collaborative team strategy.

### **5. Necessity for an Effective Customer Relationship Management (CRM)**

While our system strength lies in partnerships, managing business referrals and relationships between programs presents a challenge. Multiple points of entry and varying platforms do not allow for all system partners to track services to employers in real-time. This has been detrimental to the relationship management of our employer customer and contributed to employer confusion and fatigue. Efforts will be focused on establishing a unified approach to managing business customer relationships through a contact management platform. Services to employers will focus on use of current business services platforms, in addition to a CRM, while helping align with occupational demands and acquiring leads to sector strategy employers.

## 6. Need for Skill Development and Training

There is a recognized lack of all-inclusive training provided to staff and partners regarding business service delivery. Internal cross-training is needed to help support business acumen, strategic thinking, analytical skills, communication expertise, and industry-specific knowledge. In addition, training is needed at the regional and local levels to clearly delineate the roles of Local Board Business Services staff, One-Stop Operators, and Business Services Team (BST). This delineation of roles will help create a seamless process to include relational business management through single points of contact while helping to closing the gap on fulfilling business referrals to the AJCs.

## PLAN SOLUTIONS

The TDLWD Workforce Services Business Engagement Plan, overseen by the Business Engagement Strategy Team (BEST), seeks to address the above-mentioned challenges comprehensively and strategically to better serve the needs of business and industry. From a high-level, this plan will focus on the following solutions:

- **Enhancing Employer Outreach:** Proactively engaging with businesses through “Business Consultants” to better understand their workforce needs and challenges. This involves regular communication and collaboration through workshops, seminars, sector strategy and industry-specific events.
- **Tailoring Workforce Solutions:** Focus on developing customized strategies to address the unique workforce requirements of different industries. We will aim to provide training programs, apprenticeships, and recruitment services that align with specific sector strategies and business needs.
- **Managing the customer relationship:** Utilization of a CRM to effectively case manage employers as customers and streamline relationships through single points of contact.
- **Rapid Employment and Skill Development Programs:** This plan will provide for immediate workforce needs while also building pipelines of skilled workers. Our AJCs will promote Career Pathways beginning with a “work first” mentality to quickly on-ramp job seekers into labor force participation. Once employed, our system will continue support through our toolkit of skill development and job training initiatives.
- **Talent Acquisition Support:** Emphasize providing businesses with access to a pool of qualified candidates tailored to their sector needs. This will include facilitated job matching, improved pre-screening of candidates, and sector-based job fairs to connect employers with potential employees.
- **Labor Market Insights:** Offer businesses valuable labor market information, including trends, wage data, and industry insights. This information will be tailored to their business cycle needs and utilized to provide assistance in making informed decisions about workforce planning and expansion.

- **Workforce Training Partnerships:** Focus on forging sector partnerships with educational institutions, training providers, and industry associations as needed. These collaborations will result in relevant training programs and certifications that meet the sector-based needs of businesses.
- **Responsive Services:** Establish a streamlined system for addressing businesses' concerns and inquiries promptly. This approach demonstrates the department's commitment to providing effective support to the business community.
- **Continuous Improvement:** The plan will emphasize ongoing assessment and refinement of strategies based on feedback from businesses and stakeholders. We will adapt strategies annually to ensure alignment with changing economic and industry landscapes.

### **PLAN STRATEGIES**

This Business Engagement Plan establishes a comprehensive agency-wide mindset redefining “business engagement.” Assessment of need and identified high-level solutions have been organized into seven foundational themes called plan “pillars.” These seven foundational pillars collectively create the plan structure:

- Adopting a Sector-Based Service Delivery Approach
- Utilizing a Business Cycle Framework
- Positioning LWDBs as Asset Mappers
- Case Managing Employers
- Enterprise Alignment
- AJC Network Improvements
- Training & Development

Each of these plan pillars are supported by targeted strategies and specific goals. As part of this blueprint infrastructure for business engagement, strategies and goals are detailed through action items and assigned action owners. Additionally, metrics for success are identified to measure progress.

Through these strategies, the TDLWD will enhance how we provide customer service to our employers and become better positioned to provide agile responses to workforce system needs. Our business engagement structure is graphically represented below and outlined within the body of this “living plan” to create a replicable blueprint model. Supporting information (such as individual program plans) and dynamic reports (such as WIRED data) are included as appendices.

# **TDLWD BUSINESS ENGAGEMENT PLAN**

**Sector-Based  
Service Delivery**

**Business Cycle  
Framework**

**LWDBs as  
Asset Mappers**

**Employer Case  
Management**

**Enterprise  
Alignment**

**AJC Network**

**Training &  
Development**



STATE OF TENNESSEE  
**DEPARTMENT OF LABOR AND WORKFORCE DEVELOPMENT**  
DIVISION OF WORKFORCE SERVICES  
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Nashville, TN 37243-1002  
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**Workforce Services Policy: Regional and Local Plans**

**Effective:** April 3, 2020\*

**Duration:** Automatic Annual Renewal

**Purpose:**

To provide guidance and establish procedures regarding the preparation of both Regional and Local Plans required by the Workforce Innovation and Opportunity Act (WIOA).

**Scope:**

Office of the Governor, Tennessee Department of Labor and Workforce Development (TDLWD); Division of Workforce Services (WFS); Tennessee Department of Economic and Community Development (ECD); Tennessee Department of Education (TNED); Tennessee Department of Human Services (DHS); State Workforce Development Board (SWDB); Title I – Adult, Dislocated Worker, and Youth Programs, Title II – Adult Education and Family Literacy Act Program(AE); Title III – Wagner-Peyser Act Program (WP); Title IV – Vocational Rehabilitation Program (VR); Regional Planning Council (RPC); Local Workforce Development Boards (LWDB); Local Workforce Development Areas (LWDA); American Job Center (AJC); One-Stop Operator (OSO); Workforce System Sub-Recipients (Sub-Recipients); Workforce System Partners (Partners)

**I. State of Tennessee Workforce Vision:**

To increase the competitive position of Tennessee business through the development of a high skilled workforce.

**A. Strategic Goals:**

- Clear Connection to Current Industry/Employers
- Clear Pipeline Development Infrastructure
- Clear Integration with Economic Development
- Outcome Visibility- Clear Data/Reporting and Predictive Analysis

\*This policy was updated by resolution of the SWDB on 8/25/23 to remove reference to prior years in the policy title and Attachment A in this auto-renewable policy.

## **B. Key Objectives**

- In order to achieve the State's vision, the following five (5) key objectives have been developed by the State Workforce Development Board:
  - Create an Integrated Intake System to Efficiently Deliver Services
  - Create a Shared Vision for Supporting Tennesseans with the Greatest Number of Barriers to Enter the Workforce
  - Create a Trained Workforce to Meet Current Industry Needs
  - Create New Dashboards to Measure the Effectiveness of the Integrated Workforce Strategy
  - Create a Simple and Effective Engagement Experience for All Candidates

## **C. Regional Planning Council:**

The Regional Planning Council (RPC) is comprised of its core WIOA partners:

- Title I- Workforce Development Activities
- Title II- Adult Education and Literacy
- Title III- Amendments to the Wagner-Peyser Act
- Title IV- Amendments to the Rehabilitation Act of 1973

The RPC should also include other WIOA partners, such as:

- Career and Technical Education
- Post-secondary Representatives
- Department of Human Services
  - Temporary Assistance for Needy Families (TANF)
  - Supplemental Nutrition Assistance Program (SNAP)
- Economic and Community Development
- Department of Corrections
- Other partners required to meet the State Vision, Goals, and Objectives

Responsibilities:

- Meet quarterly to advise and recommend action plans for the Local Workforce Development Areas (LWDAs);
- Meet monthly during strategic plan development
- Ensure the WIOA regional plan action steps intended to streamline regional workforce systems using the four (4) strategic goals and five (5) key workforce objectives;
- Foster a culture of achievement within the region;
- Set WIOA implementation schedules and meetings with stakeholders; and
- Leverage region and Local Workforce Development Boards (LWDBs) without duplication;

LWDBs are subject to the open meeting requirements of the TCA 8-44-101. The intent of the law is to ensure that meetings are properly noticed, agendas are made available and that the public has an opportunity to provide comment on local policy and operations.

The State Workforce Development Board (SWDB) is providing additional community engagement requirements to ensure that the interests of client populations are placed at the center of all planning and is in compliance with TCA 8-44-101 and WIOA Section 107(e).

#### **D. Requirements for the Planning Process:**

Follow applicable open meeting guidelines.

- Notification must be shared with all relevant regional/local stakeholders, and the general public to ensure opportunities to participate in and to provide feedback on local/regional plan
- Stakeholders invited to participate in planning processes must include all members of the Regional Planning Council and other community based partners, such as: organizations providing services to the re-entry population and English learners, as well as adult education partners, SNAP/TANF representatives, disability organizations associated with the Department of Vocational Rehabilitation and located within other systems.
- The RPC must hold one (1) listening session or planning meeting outside of regular business hours (regular business hours are presumed to be 8am-5pm Monday through Friday). This meeting should be public and made available to participants in the geographic area where the board has jurisdiction.
- LWDBs must post the meeting notice in a prominent, clear location on the LWDB website, in the lobby of office(s), and at America's Job Centers (AJCs).
- The LWDBs, representing each LWDA in a RPC, must provide an opportunity for public comment on local and regional plan modifications developed through both the local<sup>1</sup> and regional<sup>2</sup> planning process before submitting the plan modifications to the Governor. To provide adequate opportunity for public comment, the LWDBs must additionally do all of the following once planning modifications have been drafted:
  - Make copies of the proposed regional and local plan modifications available to the public through electronic and other means, such as public hearings and local news media.
  - Include an opportunity for comment by members of the public, including representatives of business, labor organizations, education, and other relevant stakeholders.
  - Provide a minimum of fifteen (15) and no more than a thirty (30) day period for comment on the plan before its submission to the SWDB, beginning on the date on which the proposed plan is made available.
- The LWDBs must submit any comments that express disagreement with the plan modifications as an attachment to the plan modifications submitted to SWDB<sup>3</sup>.
- The LWDB must make information about the development of plan modifications available to the public on a regular basis through electronic means and open meetings<sup>4</sup>. Public meetings and publicly disbursed information pertaining to regional and local plan content must be made accessible to individuals with disabilities to ensure an opportunity for full and equal participation in the regional and local planning process<sup>5</sup>.

#### **II. Plan Submission:**

Deadlines for submission and approval of the regional and local plans are located in **Attachment A**.

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<sup>1</sup> 20 CFR 679.510(b)

<sup>2</sup> 20 CFR 679.550(b)

<sup>3</sup> 20 CFR 679.510(b)(4)

<sup>4</sup> WIOA Section 107(e)

<sup>5</sup> WIOA Section 188

Regional and local plans must follow the format as laid out in Local/ Regional Planning Guide **(Attachment B)**. A checklist of required items will be provided for guidance to ensure all elements have been provided **(Attachment C)**. The required items and contents will be reviewed and scored for quality and completeness to meet compliance requirements. The review will be conducted utilizing the scoring matrix in **Attachment D & E**.

Each RPC and LWDB within the planning region must submit one (1) package that includes the following:

- Electronic version of the regional plan or local plan in pdf format with required attachments labeled and signatures.
- A Chief Local Elected Official (CLEO) signature is required for local plans, but not regional plans. However, CLEOs are still required to approve final regional plans and include documentation of the approval (meeting minutes, resolutions etc.) with their submission.

### **III. Decision<sup>6</sup>:**

The Tennessee State Workforce Development Board (SWDB) will send a notification of approval within 90 days of submission. If no approval notice has been sent after 90 days by the SWDB, the plans will be considered approved. If the plan is not approved, the Tennessee Department of Labor and Workforce Development will follow up with any regional and/or local areas.

The Tennessee Department of Labor and Workforce Development may choose not to approve a draft plan submission for any of the following reasons:

- Deficiencies exist in activities carried out in WIOA Sections 211 and 212, and WIOA sections 221, 222, 223, 224 and 225<sup>7</sup>;
- The plan does not comply with the applicable provisions of WIOA, such as provisions outlined in the WIOA Section 188;<sup>8</sup>
- The plan does not align with Tennessee's Combined State Plan<sup>9</sup>; or
- The plan does not align with the respective regional or local plan(s).

### **References:**

20 CFR part 679; WIOA Section 107(e); WIOA Section 188; 2 CFR Parts 220, 225, 230; 20 CFR Parts 601, 651, 652 et al.; 20 CFR 678.305(d), 678.800; Notice of Proposed Rule Making (NPRM); WIOA Section 121(g); TEGL 10-19

### **Attachments:**

**Attachment A- Deadlines for Regional and Local Plans**

**Attachment B- Regional and Local Plan Guide**

**Attachment C- Regional and Local Plan Checklist**

**Attachment D- Regional Plan Scoring Matrix**

**Attachment E- Local Plan Scoring Matrix**

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<sup>6</sup> 20 CFR 679.570

<sup>7</sup> 20 CFR 679.570(a)(1)

<sup>8</sup> 20 CFR 679.570(a)(2)

<sup>9</sup> 20 CFR 679.570(a)(3)



**Contact:**

For any questions related to this policy, please contact the Program Integrity Unit at [Workforce.Board@tn.gov](mailto:Workforce.Board@tn.gov).

A handwritten signature in black ink, appearing to read 'Tim Berry', is written over a horizontal line.

Tim Berry, State Workforce Development Board Chair

## Attachment A- Deadlines for Regional and Local Plans

REGIONAL/LOCAL PLAN TIMELINE	
ACTIVITY	DEADLINE DATE
LWDA Executive Director Work Session for Regional and Local Planning Guidance	December 13, 2023
State Workforce Agency (SWA) Issues 2024-2027 Regional and Local Plan Guidance	January 8, 2024
Regional and Local Plans Due for Public Comment	March 8, 2024
Plans with CLEO Signature Due to SWA	April 8, 2024
Internal Regional and Local Plan Review Period	April 8-19, 2024
Approval Recommendations Sent to Chief Strategy Officer and Chief of Staff	April 24, 2024
Approval Recommendations Sent Out to State Workforce Development Board (SWDB) Members	April 26, 2024
Plans Presented to SWDB	May 17, 2024
Any Approval Conditions Resolved	May 17- June 14, 2024
Full Approval	June 17, 2024



## **Attachment B- Regional and Local Planning Guide**

The Attachment B- Regional and Local Planning Guide, will be a template provided to each Regional Planning Council (RPC) and Local Workforce Development Board (LWDB). This template will be separated into a Regional Plan and Local Plan, each including a Strategy Tracker. These documents will be completed and submitted by the identified dates in Attachment A.

The templates for this Attachment provided to the RPCs and LWDBS are as follows:

### Regional Plan

- Regional Plan Guidance Template (including link to Strategy Tracker)
- Regional Plan Signatures Template

### Local Plan

- Local Plan Guidance Template (including link to Strategy Tracker)
- Local Plan Signatures Template



## Attachment C- Regional and Local Planning Checklist

- ☐ Completed Regional Plan Template
- ☐ Regional Plan Attachments
  - Documentation of CLEO approval
- ☐ Completed Local Plan Template
- ☐ Local Plan Attachments
  - Required Policies
  - CLEO Signature Page
  - Partners MOU & IFA
  - Additional Cooperative Agreements
  - Budget Information and Supporting Materials



## Attachment D-Regional Plan Scoring Matrix

Follow these guidelines when grading each question:				
<b>Satisfactory</b> = Answer directly provides specific detail associated with the element				
<b>Needs Improvement</b> = Answer does not directly provide specific detail associated with the element				
Regional Labor Market Analysis		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
1.	The plan includes an analysis of the economic conditions including existing and emerging in-demand industry sectors and occupations.			
2.	The plan analyzes the employment needs of employers in existing and emerging in-demand industry sectors and occupations.			
3.	The plan provides an analysis of the knowledge and skills needed to meet the employment needs of the employers in the region, including employment needs in in-demand industry sectors and occupations.			
4.	The plan includes an analysis of the regional workforce, including current labor force employment and unemployment data, information on labor market trends, and educational and skill levels of the workforce, including individuals with barriers to employment.			
5.	The plan describes the involvement of all partners in providing, analyzing, and agreeing on supply and demand data and the targeted sectors/industries/occupations/skills.			
6.	The plan addresses how the region is changing in terms of demographics, labor supply, and occupational demand.			



## Attachment D-Regional Plan Scoring Matrix

Support of State Initiatives		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
7.	The plan addresses how local initiatives will positively address LFPR efforts.			
8.	The plan provides how the local area is addressing each of the seven pillars of the Business Engagement Plan.			
9.	The plan explains how the local area will implement SYEP to include the leveraging of partnerships.			
10.	The plan explains the outreach strategy for SYEP.			
11.	The plan describes how the local area will be implementing recommendations made by the KPMG assessment study.			
12.	The plan provides the plan for an innovative funding structure to include what additional funding sources will be sought after and how the local area will staff and administer this additional funding.			
Regional Service Strategies		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
13.	The plan describes the regional service strategies, including the use of cooperative service delivery strategies			



## Attachment D-Regional Plan Scoring Matrix

14.	The plan provides an analysis of workforce development activities, including education and training in the region.			
15.	The plan indicates the strengths and weaknesses of workforce development activities and the capacity to provide the workforce development activities to address the education and skill needs of the workforce, including individuals with barriers to employment, and the employment needs of employers.			
16.	The plan defines what new service strategies will be used to address regional educational and training needs based on promising ROI.			
17.	The plan identifies what formal and informal cooperative procedures the core partners and other required partners will establish to align services and coordinate delivery.			
18.	The plan describes the strategic vision to support state, regional, and local economic growth.			
<b>Sector Initiatives for In-Demand Sectors or Occupations</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
19.	The plan identifies sectors, industries, occupations, and skills that are in demand.			
20.	The plan identifies sectors, industries, and occupations that are considered emerging in the regional economy.			



## Attachment D-Regional Plan Scoring Matrix

<b>Economic Development/Business Engagement</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
21.	The plan provides a description of the regional strategies that will achieve the vision and goals, including a description of the strategies and services that will be used in the regional planning areas.			
22.	The plan describes the strategies to better coordinate workforce development and economic development.			
23.	The plan identifies the implementation of initiatives such as apprenticeships, incumbent worker training programs, on-the-job training programs, customized training programs, industry and sector strategies, career pathways initiatives, utilization of effective business intermediaries, and other business services and strategies designed to meet the needs of regional employers.			
<b>Coordination of Supportive Services</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
24.	The plan describes how transportation and other supportive services are coordinated within the region.			
<b>Performance Accountability</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
25.	The plan describes the strategies relating to the performance accountability measures based on			





## Attachment D-Regional Plan Scoring Matrix

	State and Local Performance Measures (Key Performance Indicators).			
26.	A plan was provided on how the region will work with each LWDA to achieve negotiated targets based on established procedures.			
27.	A description of how State and Local Performance Measures will be monitored and tracked towards meeting regional measures.			
<b>Coordination of Cost Arrangement</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
28.	The plan describes the coordination of administrative cost arrangements, including pooling of funds, as appropriate.			
<b>Public Comments</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
29.	The plan includes the process for providing an adequate amount of time for a public comment period.			
30.	Included comments from the public comment period in a separate attachment.			
<b>Stakeholder Involvement</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
31.	The planning period includes the involvement of all required stakeholders and how they were engaged.			
<b>Attachments</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
32.	Documentation of CLEO approval is attached.			



## Attachment D-Regional Plan Scoring Matrix

Scoring Criteria	# of Satisfactory	# of Needs Improvement
Regional Labor Market Analysis		
Support of State Initiatives		
Regional Service Strategies		
Sector Initiatives for In-Demand Sectors or Occupations		
Economic Development/Business Engagement		
Coordination of Support Services		
Performance Accountability		
Coordination of Cost Arrangement		
Public Comments		
Stakeholder Involvement		
Attachments		
<b>Overall Score:</b>		
Recommend for State Workforce Development Board Approval (100% Satisfactory)		
Recommend for Corrections (Less than 100% Needs Improvement)		



## Attachment E- Local Plan Scoring Matrix

Follow these guidelines when grading each element:				
<b>Satisfactory</b> = Answer directly provides specific detail associated with the element				
<b>Needs Improvement</b> = Answer does not directly provide specific detail associated with the element				
Regional and Local Analysis		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
1.	The plan provides an analysis of the in-demand sectors and occupations, specifically the needs of businesses.			
2.	The plan compares the LWDA to the region on economic conditions.			
3.	The plan provides an analysis of the workforce development and education activities.			
Strategic Planning Element		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
4.	The plan provides a description of how the local board will expand access to employment, training, education, and supportive services for eligible individuals, particularly eligible individuals with barriers to employment.			
5.	The plan describes how the local area's workforce development programs, including programs provided by partner agencies, supports the local strategic vision.			
6.	The plan addresses how the local performance measures address regional economic growth and self-sufficiency.			
Support of State Initiatives		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
7.	The plan addresses how local initiatives will positively address LFPR efforts.			



## Attachment E- Local Plan Scoring Matrix

8.	The plan provides how the local area is addressing each of the seven pillars of the Business Engagement Plan.			
9.	The plan explains how the local area will implement SYEP to include the leveraging of partnerships.			
10.	The plan explains the outreach strategy for SYEP.			
11.	The plan describes how the local area will be implementing recommendations made by the KPMG assessment study.			
12.	The plan provides the plan for an innovative funding structure to include what additional funding sources will be sought after and how the local area will staff and administer this additional funding.			
<b>Local One-Stop System</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
13.	The plan provides a description of the one-stop delivery system in the local area, including the roles and resource contributions of the one-stop partners.			
14.	The plan describes how the Local Board will support the strategy identified in the TN Combined State Plan and work with entities carrying out core programs.			
<b>Workforce Development and Career Pathways</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
15.	The plan provides a description of how the local board will facilitate the development of career pathways and co-enrollment, as appropriate, in core programs.			
16.	The plan provides a description of how the local board will improve access to activities leading to a recognized post-secondary credential.			



## Attachment E- Local Plan Scoring Matrix

Access to Employment and Services		Satisfactory	Needs Improvement	Comments/Areas of Opportunity:
17.	The plan provides coordination strategies to include services to veterans and eligible spouses, including priority of service and the use of available Jobs for Veterans State Grants (JVSF) staff.			
18.	The plan provides a copy of the local supportive service policy.			
19.	The plan describes how the local board will coordinate the provision of transportation and other appropriate supportive services in the local area.			
20.	The plan describes how priority will be given to recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient consistent with WIOA Sec. 134(c)(3)(E). (§ 679.560(b)(21)).			
21.	The plan describes how the Local Board will determine priority populations and how to best serve them, along with any other state requirements.			
22.	The plan describes how the Local Board will facilitate access to services provided through the one-stop delivery system, including in remote areas, through the use of technology and other means.			
23.	The plan provides a description of the initiative the LWDB is implementing or will implement to serve individuals who will be re-entering the workforce who were previously incarcerated or justice involved.			



## Attachment E- Local Plan Scoring Matrix

24.	The plan describes how the Local Board will facilitate access to services provided through the one-stop delivery system, including in remote areas, through the use of technology and other means.			
25.	The plan indicates how entities within the one-stop delivery system, including one-stop operators and the one-stop partners, will comply with WIOA Sec. 188, if applicable, and applicable provisions of the Americans with Disabilities Act of 1990 (42 U.S.C. 12101 et seq.).			
<b>Business Engagement</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
26.	The plan describes how the Local Board will coordinate workforce investment activities carried out in the local area with statewide rapid response activities.			
27.	The plan provides a description of how the area will implement initiatives such as apprenticeships, incumbent worker training programs, on-the-job training programs, customized training programs, industry and sector strategies, career pathways initiatives, utilization of effective business intermediaries, and other business services and strategies designed to meet the needs of employers in the corresponding region in support of the business service strategy.			
<b>Training Services</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>



## Attachment E- Local Plan Scoring Matrix

28.	The plan describes how the local area will provide adult and dislocated workers with employment and training activities.			
29.	The plan provides a description and assessment of the type and availability of adult and dislocated worker employment and training activities in the local area.			
30.	The plan defines how training services outlined in WIOA Sec. 134 will be provided through the use of individual training accounts, including if contracts for training services will be used, and how the use of such contracts will be coordinated with the use of individual training accounts under that chapter.			
31.	The plan describes how the Local Board will ensure informed customer choice in the selection of training programs regardless of how the training services are to be provided.			
32.	The plan describes how the Local Board will ensure the continuous improvement of eligible providers of services through the system and that the providers will meet the employment needs of local employers, workers, and job seekers.			
<b>Program Coordination</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
33.	The plan provides information regarding the local coordination strategies with state, regional, and local partners to enhance services and avoid duplication activities.			



## Attachment E- Local Plan Scoring Matrix

34.	The plan provides coordination strategies to include Adult, Dislocated Worker, and Youth employment and training activities under WIOA Title I.			
35.	The plan provides coordination strategies to include Adult education and literacy activities under WIOA Title II.			
36.	The plan provides a description of how the Local Board will carry out the review of local applications submitted under Title II.			
37.	The plan provides coordination strategies to include Wagner-Peyser Act (29 U.S.C. 49 et seq.) services under WIOA Title III.			
38.	The plan provides coordination strategies to include Vocational rehabilitation service activities under WIOA Title IV.			
39.	The plan provides coordination strategies to include relevant secondary and post-secondary education programs and activities with education and workforce investment activities			
40.	The plan describes how the Local Board will support the strategy identified in the State Plan and work with the entities carrying out core programs and other workforce development programs, including programs of study authorized under the Strengthening Career and Technical Education for the 21st Century (Perkins V) Act (20 U.S.C. 2301 et seq.) to support service alignment.			
41.	The plan provides coordination strategies to include other services provided in the one-stop delivery			





## Attachment E- Local Plan Scoring Matrix

	system including but not limited to the programs outlined in WIOA Sec. 121.			
<b>Youth Activities</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
42.	The plan describes the process by which the local area will provide youth activities.			
43.	The plan includes a description and assessment of the type and availability of youth workforce investment activities in the local area, including activities for youth who are individuals with disabilities, which includes an identification of successful models of such activities.			
<b>Administration</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
44.	The plan includes information on the actions the Local Board will take toward becoming or remaining a high-performing board, consistent with the factors developed by the State Board.			
45.	The plan provides information regarding the local levels of performance negotiated with the Governor and chief elected official consistent with WIOA Sec. 116(c), to be used to measure the performance of the local area and to be used by the Local Board for measuring the performance of the local fiscal agent (where appropriate), eligible providers under WIOA Title I Subtitle B and the one-stop delivery system in the local area.			



## Attachment E- Local Plan Scoring Matrix

46.	The plan identifies the entity responsible for the disbursement of grant funds described in WIOA as determined by the chief elected official or the Governor under WIOA.			
<b>Public Comment</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
47.	The plan includes the process for providing an adequate amount of time for a public comment period.			
48.	Included comments from the public comment period in a separate attachment.			
<b>Stakeholder Involvement</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
49.	The planning period includes the involvement of all required stakeholders and how they were engaged.			
<b>Attachments</b>		<b>Satisfactory</b>	<b>Needs Improvement</b>	<b>Comments/Areas of Opportunity:</b>
50.	Provided LWDA Organizational Chart listing staff and titles			
51.	Provided any executed cooperative agreements (MOUs), if applicable.			



## Attachment E- Local Plan Scoring Matrix

52.	Provided a link to the policy page or the Eligible Training Provider List (ETPL) approval policy.			
53.	Provided a link to the policy page or the Individual Training Accounts (ITA) policy.			
54.	Provided a link to the policy page or the Supportive Services Policy			
55.	Provided a link to the policy page or the Procurement Policy			
56.	Provided a link to the policy page or the Youth Needs Additional Assistance Policy			
57.	Provided a <b>detailed budget</b> that lists the sources and uses of Tennessee Department of Labor and Workforce Development (TDLWD) pass-through funds and all non-Federal matching funds.			
58.	Provided a budget narrative that includes a detailed explanation of expenditures by the line items listed on Standard Form 424A.			
59.	If applicable, provided the purpose of travel and supply/equipment lists, and describe expenses in the 'other' line item.			
60.	If applicable, the provided budget includes personnel or contractual expenses (cash or in-kind resources), estimates the number of hours/days and hourly rate (or portion of FTE and salary) for the time that is			



## Attachment E- Local Plan Scoring Matrix

	expected to be spent on the proposed project by key personnel, contractors, or consultants.			
61.	If applicable, the provided budget includes land or buildings, provide an MAI appraisal or comparable appraisal.			
62.	Provided identification for each non-TDLWD funding source as federal, state, local, or private.			
63.	Provided a letter of commitment from each funding source that specifies the amount of funds committed and the kind of funds committed (grant, loan, cash, in-kind, etc.).			
64.	Provided a description of leveraged funds to include any fee-based and/or revenue generated.			
65.	Provided a description of in-kind resources, including the methods used to determine their value.			
Scoring Criteria		# of Satisfactory		# of Needs Improvement
Regional and Local Analysis				
Strategic Planning Element				
Support of State Initiatives				
Local One-Stop System				
Workforce Development and Career Pathways				
Access to Employment and Services				
Business Engagement				
Training Services				
Program Coordination				



## Attachment E- Local Plan Scoring Matrix

<b>Youth Activities</b>		
<b>Administration</b>		
<b>Public Comments</b>		
<b>Stakeholder Involvement</b>		
<b>Attachments</b>		
<b>Overall Score:</b>		
Recommend for State Workforce Development Board Approval (100% Satisfactory)		
Recommend for Corrections (Less than 100% Needs Improvement)		