

Finance Committee

May 6, 2021

10:00 A.M.

[Click here for zoom link](#)

Meeting ID: 893 8665 8049

Password: 419105

Telephone Number: +1 312 626 6799

Agenda

Welcome

Call the Meeting to Order

Approval of Minutes

Business Reports:

1. Career Service Provider-Performance Review
 - a. EDSI
 - b. MAC
2. 2020-2021 3rd Quarter Report
3. 2021-2022 Proposed Budget
4. Special Funding Requests:
 - a. KPI Update-State Policy
 - b. Summer Youth Employment Program
 - c. McGruder Center-Offender Pilot Request

Members:

Mark Peed (Chair)
Keith Carnahan
Dan Caldwell
David Rutledge
Howard Bradley
Paul Webb
Kristi Spurgeon
Charles Story

Adjourn

Complete zoom link: <https://us02web.zoom.us/j/89386658049?pwd=Z1p3UW5Nb1F1UFdZaUxWREREQndLdz09>



Northern Middle TN Workforce Board Finance Committee
February 2, 2021
9:00 a.m. Virtual via Zoom
Workforce Essentials
523 Madison Street, Clarksville, Tennessee

Members Attending	Members Absent	Staff & Guests Attending
Mark Peed	Kristi Spurgeon	Marla Rye
Howard Bradley	Charles Story	Ginger Fussell
John Alexander	Keith Carnahan	Andrea Dillard
Paul Webb	Dan Caldwell	John Watz
John Zobl		Renee Hollis
David Rutledge		Christel Brown
Seth Thurman		

The Finance Committee of the Northern Middle Tennessee Workforce Board met virtually on February 2, at 9 a.m. via zoom conference.

The meeting was called to order by Chairman Mark Peed. Marla Rye called roll to document attendance. Mark asked for approval of the minutes. Howard Bradley moved to approve and was seconded by John Alexander. The minutes passed unanimously.

Marla welcomed the group and informed the committee that we would begin with an update from Ginger.

2020-2021 2nd Quarter Report:

Ginger opened her report by letting the board know that grant expenditures increased by \$527,000 over quarter one. Additional funding of \$2.5 million was received in Quarter 1 from COVID-related grants such as the existing national Dislocated worker grant, an additional national Dislocated Worker grant, and CARES grants. Some of the additional grants were time-sensitive. Much of the activity associated with the COVID-related grants were administered at the Board level. Andrea Dillard, Renee Hollis and Freda Herndon worked hard to utilize this funding and help people, making this a wonderful quarter despite a slight decline in core activities.

Ginger reported we spent \$7.4 million through the first half of the year, which is now 50% complete. Grant fund utilization of the same core activities as the prior quarter is at 44.7%. Utilization is at 41.9% when factoring in the additional Quarter 2 funding. Meeting materials indicate that grant spending is at 98.5%, 95%, and 96.3% for the apprenticeship grant, CARES consolidated business grant, and CARES re-employment grant, respectively. The CARES grants were short-term. Grant funding above and beyond core activities was spent by putting dislocated workers to work and helping employers with CARES grant funding. Ginger explained that the \$2.5 million would be injected into the budget analysis, and she will request an action item to approve a revised budget of \$18.6 million (\$17.6 million + \$1 infrastructure).

Mid-Cumberland's contract ended December 31, 2020. They were allowed the month of January for their final billings, and the invoice will be received in the first week of February. Mid-Cumberland surpassed where they were last year in Quarter 2 but declined about \$88,000 compared to Quarter 1 of this year, which was their highest quarter of the contract. The year started off slow the first two months, but MCHRA had a successful September. In the six-month contract, MCHRA utilized 82.5% of the funding. The One-Stop Operator contract is at 30% expended due to unfilled positions. Enrollments were at 75% of goals. Quarter 1 had 557 enrollments, while Quarter 2 had 251. As expenditures lag enrollments, Ginger expressed concern about expenditures and MPCR in the upcoming quarter with new contractors starting.

Ginger reported that Northern Middle has spent 77.2% of the \$7.7 million Campbell Strong project. 80.8% has been spent of the direct participant goal, and enrollment is about 74% with nine months left. Marla pointed out that there is a slowdown in the number of soldiers exiting the military, which could be COVID-related.

As a workforce area, Ginger stated that we had exceeded the 40% Minimum Participant Cost Rate (MPCR) requirement achieving 44.87% even though we are still under a waiver. We are close to achieving 60% MPCR with our disaster relief grant, the CARES apprenticeship, and incumbent worker activities factored in. While not included in the state's MPCR calculation, those grants expend high dollar percentages directly to participants, for example, 95.09% for disaster relief and 99.83% for CARES and incumbent workers. Marla added that Northern Middle was one of the few areas in the state of Tennessee that spent all their CARES Act money by the tight deadline.

Monitoring Update:

Ginger reported that the service provider transition made this a very busy month. Many meetings with our incoming providers were held through the quarter, with service delivery, planning, and implementation monitored. Board/staff expectations and visions were communicated. Contractor trainings were held in December and January and will continue. Monitoring focus is on the incoming provider's staffing plans, training, and ability to be ready to help participants.

Monitoring of Mid-Cumberland also continued, including desk reviews, sampling, with results and areas of concern communicated. A memo was sent with potential disallowed costs. Marla clarified that a disallowed cost might happen when a participant is certified as eligible to participate in the program, but through monitoring, the customer is deemed to be over income or ineligible for other reasons. Cost incurred on this participant would be disallowed. Technical

assistance is still being provided. Transition meetings have been held to discuss closeout accountability, deadlines, transfer of data management, asset inventory, and expenditure cut off have all been stressed as important.

Marla stated that staff turnover continues to plague the service providers. This further exasperates program errors and question costs because staff are new and inexperienced. She stated that the contractors really need consistency in operations and comprehensive staff training.

Audit Report-June 30, 2020:

Ginger reported that the audit was completed, and Marla emailed out the full audit. In summary, all audit opinions were unmodified (clean) opinions with no audit findings. Northern Middle now qualifies as a low-risk auditee. This was our third year for a full audit. Two years of clean audits will result in the low-risk category.

The firm Thurman Campbell group was selected in an earlier procurement to perform the audit. Ginger requested to extend their contract for the next year if no committee member objected. Ginger felt they conducted a quality audit. She provided a recap of the previous procurement process, audit quotes, audit timing and the need for focus in monitoring the new contractors. Paul Webb requested a representative from the firm be present at the next full board meeting to hear directly from the firm. Howard Bradley made a motion to approve extending the auditor's contract for one year. Paul Webb seconded the motion. With no discussion, all board members voted in favor of the motion.

David Rutledge made a motion to accept the additional \$2.5 million added to the 20-21 budget making the total \$18.6 million. Howard Bradley seconded the motion. The floor was opened for discussion, and Chairman Peed asked if we were on the path to consuming all funds by the end of the fiscal year. Ginger pointed out that both National Dislocated Worker grants are two-year grants and will expire in June of 2022 but are included in this year's budget so that expenditures could be made sooner than later if the need arises. Marla explained we spend old money first so that unspent money will carry over into the second year and be spent first. With no other discussion, there was a vote, and all board members voted in favor of the motion.

Career Service Provider-Transition Update:

Marla reported that she felt like training for the new provider is progressing but would do things differently in the future if we have to go through another transition. She felt like having a longer transition period between providers would be beneficial. This would allow the centers to stay open and continue enrolling and serving customers. There have been no new enrollments for January. We continue to counsel the new providers about getting their programs up and running. They are having problems with staffing open positions. They have also had workers quit after a few days. Marla feels the contractors can be successful and the future months will be better, but January did not go as well as hoped.

Mark Peed asked about One-Stop Operator positions and why some positions haven't been filled. Marla explained that Mid-Cumberland handles the particular position, and during the end of 2020, they had several vacant positions that they didn't want to fill because of the uncertain future of the contract. As soon as they got the contract, they filled all of the vacant positions.

Marla explained that EDSI chose to hire fewer employees in order to pay a more competitive rate. The intent was to hire quality employees that would remain in their position longer. Even though they are having trouble retaining people and filling open positions right now, they are sending in a management team to assist with the transition until the position can be filled.

Marla reported she felt that MAC (Metro Action Commission) had the knowledge to get the job done. She explained that the Program Director Ellen Zinkiewicz is familiar with the way Tennessee operates because of previous experience with the Nashville Career Advancement Center. However, she stated that the first month had not met expectations either. Marla went on to say that EDSI's contract was for \$8.37 million, MAC was for \$800,000, Mid-Cumberland's One-Stop Operator contract was for \$447,000, and their follow-up contract was for \$86,000. The follow-up contract is in regards to 1,150 clients that have exited the program but still need follow-up on a quarterly basis. Mid-Cumberland agreed to provide the follow-up services. Their contract will end when those clients have completed follow-up requirements no later than December 31, 2021.

Andrea Dillard reported on the Project Return pilot project. She explained that the contract started just prior to the pandemic but has not been able to move forward due to the prison in Trousdale County being closed to visitors because of COVID. Both parties have agreed to nullify the contract at the request of Project Return leadership. There haven't been expenditures spent on this project.

With no other questions, the meeting was adjourned.

Meeting ID	Topic	Start Time	End Time	User Email	Duration (Minutes)	Participants
88164720757	NM Finance Committee Meeting	2/2/2021 8:53	2/2/2021 9:39	mrye@workforceessentials.com	46	10

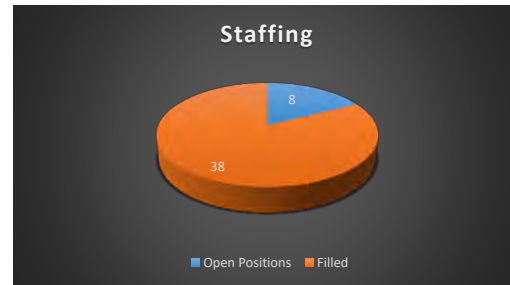
Name (Original Name)	User Email	Join Time	Leave Time	Duration (Minutes)	Guest
Mark Peed		2/2/2021 8:53	2/2/2021 9:39	46	Yes
Marla Rye	mrye@workforceessentials.com	2/2/2021 8:54	2/2/2021 9:39	45	No
Howard Bradley		2/2/2021 8:54	2/2/2021 9:39	45	Yes
John Alexander	john.alexander@tn.gov	2/2/2021 8:55	2/2/2021 9:39	45	Yes
C Brown		2/2/2021 8:56	2/2/2021 9:39	44	Yes
Paul Webb		2/2/2021 8:56	2/2/2021 9:39	44	Yes
John Zobl		2/2/2021 8:58	2/2/2021 9:39	42	Yes
David Rutledge	drutledge@selaborers.org	2/2/2021 9:00	2/2/2021 9:39	40	Yes
19312898735		2/2/2021 9:09	2/2/2021 9:39	30	Yes
Kristi		2/2/2021 9:10	2/2/2021 9:13	3	Yes

EDSI Implementation Dashboard-April 28, 2021

1. Staffing

Open Positions	Filled	Total Positions	% Vacant
8	38	46	17.4%

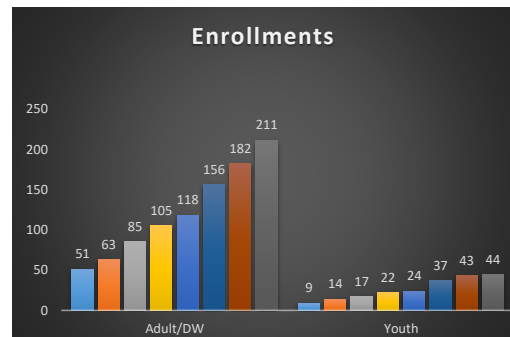
1	Career Advisor -Ad/DW	Sumner	Declined
2	Business Services	Sumner/Trousdale	
3	Community Outreach Coordinator		
4	Career Advisor -Ad/DW	Nashville	Resignation
5	RESEA Advisor	Robertson	Declined
6	Business Services	Williamson	
7	Business Services	Davidson	Resignation
8	Youth Advocate	Sumner	Resignation



2. Enrollments (cumulative)

Week	Adult/DW	Youth	Total	Change
Goal (6/30)	455	112	567	
3/3/2021	51	9	60	
3/10/2021	63	14	77	17
3/15/2021	85	17	102	25
3/24/2021	105	22	127	25
3/31/2021	118	24	142	15
4/7/2021	139	32	171	29
4/13/2021	156	37	193	22
4/20/2021	182	43	225	32
4/28/2021	211	44	255	30

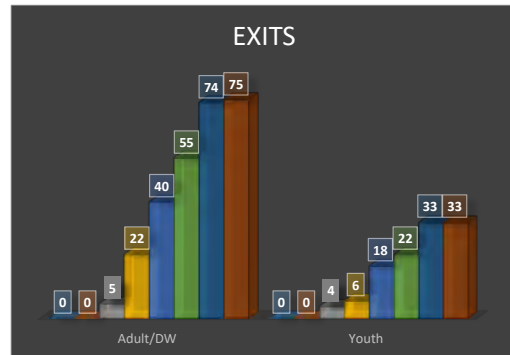
*9 weeks- 46% 39% 45%
 27 8 35



3. Exits

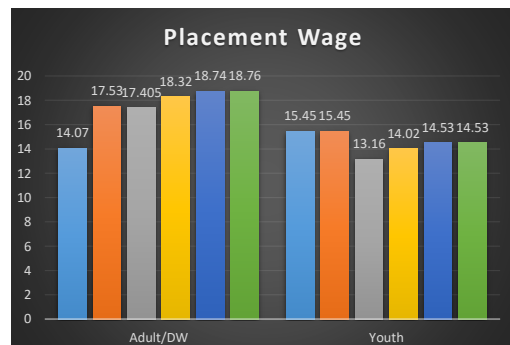
Week	Adult/DW	Youth	Total	Change
Goal	228	56	284	
3/3/2021	0	0	0	0
3/10/2021	0	0	0	0
3/15/2021	5	4	9	9
3/24/2021	22	6	28	19
3/31/2021	40	18	58	30
4/7/2021	55	22	77	19
4/20/2021	74	33	107	30
4/28/2021	75	33	108	1

Positive 83% 64%
 9 weeks 17.0 2.6



4. Placement Wage

Week	Adult/DW	Youth	Total	Change
Goal	\$ 15.00	\$ 10.00		
3/3/2021	0	0		
3/10/2021	0	0		
3/17/2021	14.07	15.45		
3/24/2021	17.53	15.45		
3/31/2021	17.405	13.16		
4/7/2021	18.32	14.02		
4/20/2021	18.74	14.53		
4/20/2021	18.76	14.53		



4. MPCR

Week	Adult	DW	Youth	Total
Goal	50%	50%	50%	
January	0%	0%	17%	
February	16%	35%	16%	-
March	18%	29%	11%	
Cumulative	12%	23%	14%	

MAC Implementation Dashboard-April 28, 2021

1. Staffing

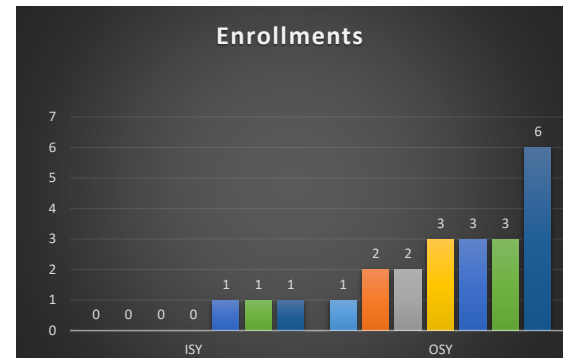
Open Positions	Filled	Total Positions	% Vacant
0	3	3	0.0%



2. Enrollments (cumulative)

Week	ISY	OSY	Total	Change
Goal (6/30)	65	50	115	
3/3/2021	0	1	1	
3/10/2021	0	2	2	1
3/15/2021	0	2	2	-
3/24/2021	0	3	3	1
3/31/2021	1	3	4	1
4/7/2021	1	3	4	-
4/13/2021	1	6	7	3
4/20/2021	1	9	10	3
4/28/2021	3	9	12	2

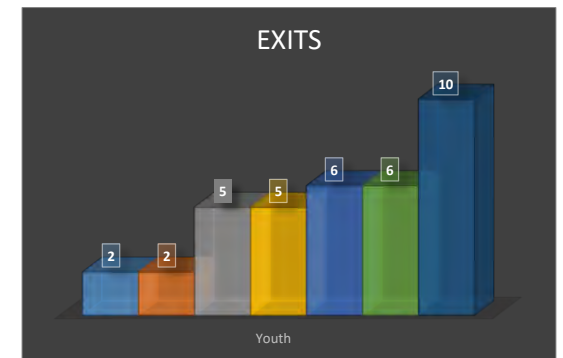
	5%	18%	10%
*10 weeks-	6.4	4.1	11



3. Exits

Week	Youth	Total	Change
Goal		0	
3/3/2021	2	2	
3/10/2021	2	2	-
3/15/2021	5	5	
3/24/2021	5	5	
3/31/2021	6	6	
4/7/2021	6	6	
4/13/2021	10	10	
4/20/2021	10	10	
4/28/2021	10	10	

Positive 80%



4. Placement Wage

Week	Youth	Total	Change
Goal	\$ 9.00		
3/3/2021			
3/10/2021			-
3/17/2021			
3/24/2021			
3/31/2021			
4/7/2021			
4/13/2021	\$ 12.48		
4/20/2021	\$12.48		
4/28/2021	\$ 12.48		

4. MPCR

Week	MPCR	Work Exp	ISY
Goal	50%	25%	40%
January	100%	85%	0%
February	19%	17%	1%
March	15%	6%	6%
Cumulative	17%	9%	4%

Educational Data Systems Inc.
WIOA Adult Dislocated Worker & Youth Program
Desk Review Action Plan: Performance
April 2021

Executive Summary: EDSI is committed to ensuring that the Northern Middle Tennessee American Job Centers are successful in reaching all the performance benchmarks within our contract. In this plan we will address the below factors that impacted our ability to meet our performance goals for quarter 1 and highlight our successes, best practices and lessons learned.

- Performance (1/2021-2/2021)
- Staffing

Performance Overview

ENROLLMENTS (Cumulative)				
Week	Adult/DW	Youth	Total	Change
Goal (6/30)	455	112	567	
3/3/2021	51	9	60	
3/10/2021	63	14	77	17
3/15/2021	85	17	102	25
3/24/2021	105	22	127	25
3/31/2021	118	24	142	15
4/7/2021	139	32	171	29
	26%	21%	25%	
*12 weeks	26	7		

EXITS				
Week	Adult/DW	Youth	Total	Change
Goal	228	56	284	
3/3/2021	0	0	0	
3/10/2021	0	0	0	
3/15/2021	5	4	9	
3/24/2021	22	6	28	
3/31/2021	40	18	58	
4/7/2021	55	22	77	
Positive	89%	64%		
*12 weeks	14	3		

PLACEMENT WAGE				
Week	Adult/DW	Youth	Total	Change
Goal	\$15.00	\$10.00		
3/3/2021	0	0		
3/10/2021	0	0		
3/15/2021	\$14.07	\$15.45		
3/24/2021	\$17.53	\$15.45		
3/31/2021	\$17.41	\$13.16		
4/7/2021	\$18.32	\$14.02		

After reflecting on the performance data for Q1 we identified the following as the main contributing factors to the outcomes:

- Provider transition (IE: Operational Set-Up, Level Setting, File Sharing) delayed the start of enrollments
 - The team began enrolling participants during the last week of January.
- Staffing Levels - Management, Project Accountant, Career Advisor and Youth Advocate positions remained unfilled for several weeks.
- Knowledge Gaps – Many of the incumbent staff had varying levels of understanding of the WIOA policies and Workforce Board expectations
- Delay in processing Supportive Services in VOS – We did not have our Project Accountant hired until March who needed to be trained in order enter payments in VOS and Concur. We also needed to
- Center Traffic - Traffic numbers in some counties have been extremely low due to decrease in engagement with community partners as well as multiple changes in the American Job Center's allowable capacity due to COVID-19. Customers have not had consistent access to the AJCs throughout the pandemic.
- Staff Morale - Many team members inherited large caseloads that were hard to manage, had concerns about the number of providers they have worked under and were/are finding it hard to adjust to new operation flows.

Staffing and Recruitment

We recognize that our recruitment plan and hiring process has had a major impact on the overall success of our contract startup and transition. Our Senior Leadership is currently working to address the nationwide recruiting challenges that have impacted EDSI's overall hiring timelines. We will also continue to engage our community partners and local colleges and advertise opportunities locally with the use of Jobs4TN.

The success of our programs can be attributed to the great work of our local Program Managers and leaders who are responsible for overseeing operations, implementation and improvement of processes, staff training and support as well as business development and community building.

Our transition began without these key management positions filled which had a major impact on operations, performance, staff morale and turnover. Our Regional Director of Operations will continue support the local leaders in developing long-term strategies to boost morale, retain great talent and ensure the overall success of the program.



15300 Commerce Drive North, Suite 200
Dearborn, MI 48120

ph. 313.271.2660 fax 313.271.2698

Orientation & Intake

At the start of the program in January, we conducted two weeks of training and brought in a transition team to assist our new team members in navigating EDSI's processes. During this period, a Value Stream Mapping session was conducted with the team to establish a process flow for each the job centers. Through this process leadership was able to quickly identify knowledge gaps that were contributing to a lack of continuity in service-delivery across the AJC's.

After assessing the knowledge gaps and operational challenges across the region we identified opportunities for improvement that could be put into two main categories:

- Enrollment Process
 - Eligibility (We also identified the need to establish a more efficient way to determine eligibility for new clients)
- Orientation
 - Intake (We worked with the Department of Labor Site Leads to ensure that a referral form was being used in every AJC to streamline referrals between all organizations)

Working with each center and in collaboration with the Department of Labor Site Leads in Rutherford, Davidson, and Montgomery Counties, we were able to individually develop a new process flow for intake and orientation that met the unique needs of each center but provided continuity.

Every comprehensive center now has an orientation schedule and a newly updated orientation presentation which was distributed to ensure that all participants across the region receive the same information and message during this engagement.

We immediately saw positive results in the overall flow in Davidson County, which contributed to the team's ability to meet and exceed the enrollment goal of 60 for Q1. It is important to note that Davidson County received an influx of foot traffic during the last two weeks in January when the centers re-opened. This created capacity issues so; the team was able to quickly pivot and begin offering two orientations per week allowing them to schedule less participants for each orientation and establish a streamlined system for scheduling intake appointments.

Enrollments

Although we did not meet our overall goal of 250 enrollments, we did have success in our affiliate centers in Cheatham, Dickson, Stewart, Wilson, and Trousdale. Upon examining the performance in these centers, we have learned that much of this success was attributed to the following:

- Long-standing relationships between the Career Advisors and Youth Advocates and the internal and external partners. Having great relationships within the community increases referrals and helps to expand our marketing reach.
- Identifying organizations that are willing to assist with our marketing efforts (i.e., distributing or hanging our flyers and brochures in their lobbies or information centers)
- Engaging with customers in the resource room
- Speaking in the HiSet orientations and/or setting up a referral system with Adult Ed and RESEA



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We did not meet our ADW and Youth enrollment goals in Montgomery, Robertson, Sumner, Rutherford, and Williamson Counties due to lack of staff, low traffic, and significantly larger caseloads. We have filled all Career Advisor and Youth Advocate positions in all the counties except Sumner for which we are actively recruiting. The team has identified community organizations within each of these counties that will be contacted in order to establish a referral system or AJC presence within their spaces. This will include working closely with the CTE Coordinators to create a schedule for our Youth Advocates to provide services within the K-12 school systems.

We also intend to increase awareness of services by distributing flyers to local foodbanks, title loan/cash advance businesses, laundry mats, utility assistance agencies, libraries, community centers, etc.

Montgomery County

While short staffed achieved 50% of the ADW and Youth enrollment goals which was to be expected being down one Career Advisor and Youth Advocate. Now that the team is fully staffed, we anticipate that the ADW and Youth enrollment goals will be met, and additional exits will be completed.

Enrollment Goal:

- ADW - 50 Enrollments
 - Achieve at a pace of 17/month
- Youth – 23 Enrollments
 - Achieve at a pace of 8/month

Target Partners: Adult education, Women's Shelter, H.O.P.E., Youth Villages, Salvation Army, Manna Café, Library, Health Department, Habitat for Humanity, VIP Children Clinic, churches, local ETPL's, DCS, Tennessee Children's Home, Transitioning Soldiers, Goodwill fairs, and Campbell Strong.

Robertson County

The biggest challenge has been traffic. To address this, we have created a plan to increase internal referrals from onsite partners and offsite engagements within the community.

Enrollment Goal:

- ADW - 10 Enrollments
- Youth – 4 Enrollments

Target Partners: Local ministry programs, TN College of Applied Technology, Volunteer State at Highland Crest, Skill Up TN, SNAP, Adult Ed, local high schools, Open Door Pregnancy Center, Centerstone, YMCA – YCAP Program, Robertson County Juvenile Court, and Family Resource Center.



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Rutherford County

The Rutherford AJC did not meet Q1 enrollment goals due to a reduction in staffing levels and a delay in hiring the external Career Advisor that was onboarded in March. Upon the transition the case load that was being handled by four incumbent Career Advisors was reduced to one. To successfully catch up on the missed Q1 goals and execute Q2 at its full capacity the proposed action plan is as follows:

Enrollment Goal:

- ADW - 58 Enrollments
 - Achieve at a pace of 20/month.
- Youth – 30 Enrollments
 - 10/month with a minimum of 3/week

Target Partners: Murfreesboro Housing Authority, Families First, RESEA, CSPED, NCOA, Vocational Rehab, TAA, SNAP E&T, ETPL Training Providers, TNPTI, Allied Health, United, Dental Staff School of TN, Omni Murfreesboro, Pregnancy Resource Centers, and local high schools.

Williamson County

Enrollment Goal:

- ADW - 22 Enrollments
 - Achieve enrollments at a pace of 8/month.
- Youth – 5 enrollments

Target Partners: Franklin Housing Authority, Stacy Radley at Snap E&T, Pregnancy Resource Center, Probation and Parole, Williamson County, Training Providers Truck Driver Institute, Dental Staff School of Franklin, TCAT Practical Nursing Program, Franklin, Adult Ed HISET program, Williamson County Schools.

Sumner County

Enrollment Goal:

- ADW - 49 Enrollments
 - Achieve enrollments at a pace of 17/month.
- Youth – 10 enrollments

Target Partners: Vol-State orientations, TCAT Hartsville, Union University orientations, Shalom Zone, Recovery Community, Recovery Courts, VIP Kids, DHS, churches, libraries, shelters, Cumberland Cross Center Program, Local Vocational Rehab, Amazing Grace mission, Centerstone, Family Resource Center, Hope Center, Salvation Army, TN Prison Outreach, United Way, local chamber meetings, Sumner County Collaborative, and local high schools.



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Placement Rates and Exits

During the month of March our strategy to reduce the caseloads and increase placements was to offer overtime to the team to conduct outreach and capture placements. We also utilized external EDSI team members to assist with outreach in the centers with the largest caseloads. As a result, we have entered 61 placements to date and continue to see an uptick in positive exits (50). This external support strategy will be ongoing until we achieve a significant reduction in cases.

Additionally, our Business Services Team is actively engaging with employers to increase the number of job opportunities available for direct placements. Outreach goals have been set for each Business Services Rep to ensure the team's success in developing enough opportunities to account for a goal of 50% direct placements during Q2 – Q6.

Below are the goals that have set for each Business Services Representative:

- 300 Employer outreach calls per quarter
- 150 Job orders per quarter
- 3 OJT placements per quarter
- 3 Paid Work Experience Internship per quarter
- Hiring Events: 1 per week and 1 Multi-Employer / Industry Specific per quarter

Participant Expenditures

Participant Expenditures were below the required goal of 50% for the month of January and February and while submissions for ITA's and Supportive Services ramped up in March we still fell short of the goal due to the delay in processing. As we trained up the field staff and Quality Control Coordinators on the submission process, we were unable to enter payments through VOS without the assistance of our Project Accountant who was onboarded late in quarter. Once this position was filled, we were quickly able to train and get the process moving quickly. We have since established a streamline process to ensure that all fundable activities are processed in a timely manner.

On our March invoice we ended the month at 16% for Adults, 30% for Dislocated Workers and 10% for Youth. Our strategy to increase participant expenditures in Q2 will include the following:

- Providing Supportive Services to newly enrolled participants in Davidson County which has highest number of enrollments and lowest number of support requests for Q1.
- Paid Work Experience for Youth participants
- Execution of OJT Contracts for participant placements
- Tech and Healthcare Bootcamps

We are currently working with Persevere to develop a 12-week bootcamp that will equip Youth participants with the skills needed to obtain certification and employment in Front End Web Development. Our plan would be to pilot the Youth Bootcamp in Rutherford County and leverage the networks of our community partners for advertisement and recruitment.

We are also exploring the development of a career exploration bootcamp to prepare participants for training in Healthcare.



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Dearborn, MI 48120

ph. 313.271.2660 fax 313.271.2698

Below are our current leads and contracts that we have executed for OJT and Paid Work Experience. The BSR team will utilize the contact reports to identify participants by desired occupation who would be a good match for current opportunities. They will also work closely with Career advisors and Youth Advocates to identify participants during the enrollment process.

OJT Contracts to-date:

- The ICEE Company
 - (5 positions) Route Sales Driver, Billing Clerk, Customer Service Representative, Project Scheduler, and Dispatcher
- Include Me Advocacy Group
 - (4 positions) Skills Coach, and Onsite Coordinator
- OJT Pending Contracts: (Waiting on Employer Signature)
 - Nashville General Hospital
 - Chartwell Hospitality

Paid Work Experience Placements to-date

- 1 Youth participant for Humphreys Co.
- 1 Youth participant for Cheatham Co.
- 1 Youth participant for Montgomery Co.

Paid Work Experience Employer Work Sites:

- Old Men Lead, LLC- Stewart County
- American Job Centers- NM 13 Counties
- Compassion Church-Dickson, Humphreys



15300 Commerce Drive North, Suite 200
Dearborn, MI 48120

□ ph. 313.271.2660 □ fax 313.271.2698

Performance Improvement Strategy

In today's nontraditional employment market, every enrollment counts. It takes a unique set of skills to effectively enroll busy applicants who have multiple responsibilities outside of the training classroom. To be effective, our enrollment team must truly understand the needs of nontraditional learners and build relationships that allow for genuine engagement. To do this well, we must train and coach staff to consistently practice a proactive recruiting process that focuses on building trust, asking the right questions, and using the knowledge learned to move prospects forward. But it is not just about the activities. The team action plans put a great deal of focus on data and evidence. In other words, it is not enough to simply hold new recruiting events or pursue new retention strategies.

Data & Evidence Strategy

- **Improving internal systems.** Tracking enrollment progress and completion can be a complex, confusing job that involves multiple departments and systems. By creating a formal self-monitoring process staff will be better able to monitor their progress and identify barriers before they arise.
- **Outreach to local organizations.** Seek to develop new relationships and recruiting pathways with local programs with communication tracking.
- **Persistent follow-up with participants.** This includes both follow-up after recruiting events to get a client employed and could also include "intrusive advising" strategies that regularly checks in with participants once they are enrolled. For example, one opportunity could be to launch a lunch series that connects participants with employers for career advising and program counseling. Many studies show that these kinds of personal connections between the provider and the participant improve employment success. Participants need to feel that they are more than just a statistic or a name on an application.
- **Redesigning marketing material to show value.** This includes updating print materials, websites, and social media with an eye to ensure they are not aimed at just a single population. This can mean more diversity in the imagery or a change in showcasing the value proposition and services offered.
- **Using role models at recruiting & training events.** Whether it is guest speakers, business representatives, or "WIOA ambassadors," it is important that recruiting events feature people that represent like the underserved population being targeted.

Action Plan

This action plan highlights innovative and tangible strategies for outreach and enrollment that will be executed in the following counties: Montgomery, Robertson, Rutherford, Sumner, and Williamson. Strategies are outlined by Levels 1-3 (L1 - immediately deploy and L3 - innovation and future initiatives).

Level 1

- Partnering with service providers, county-based organizations, and advocacy groups. Advocacy groups play a key role in reaching the targeted population due to their established relationships with users who might not otherwise be exposed to the program. (*Refer to Enrollments Section above for detailed list of organizations*)



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- Identify and connect with other public programs that service low-income populations to enroll eligible individuals that already use services in the county system.
- Leverage team members who already have informal connections within the community to establish and grow organizational partnerships.
 - In addition to this, reaching out to participants that have exited the program who are already connected to relevant organizations can increase the opportunity for OJT, PWE and placements.

Level 2

- Move individuals from eligible to enrolled through in-reach and outreach efforts quickly. In-reach refers to activities administered by the AJC staff to identify, engage, and enroll an eligible individual within its existing system (*IE: to invite an existing population who have already had a touch point with staff*). Outreach refers to those same activities but is aimed at individuals outside the AJC's system (*IE: to invite those who do not use, or who under use WIOA services*). These approaches may influence people to increase their use of WIOA services helping to increase other program KPI's such as Supportive Services, OJT, PWE, etc.



Level 3

- Mailing of notifications and prepopulated applications to redetermine enrollees.
- Utilizing new technology systems to help identify eligible individuals in other public programs by targeting existing low-income populations that already use services in the county system (*IE: Adoption and Foster Care Analysis Reporting System (AFCARS), TFACTS (Tennessee Family and Child Tracking System)*)
- Forming partnerships with third-party organizations—businesses, nonprofits, government agencies, hospitals, and more—and offering programs tailored *specifically* for them (*IE: EHR Coding Certification*).
- Establish an ROI strategy for employers. We will position our program to address specific organizational and workforce development needs and be able to explain why a digital marketing certificate will offer employees skills that specifically address employer's workforce needs and problems. A return on training as a benefit is important to employers. Especially in the case when employers align their employee benefits with education tuition assistance programs, it becomes an ROI perspective. Companies and employers want a strong return on an education investment. When companies support and/or pay for 'X' degree it is important to correlate it to 'Y' dollars saved, some definite type of employee retention improvement, or other important value for the company.



15300 Commerce Drive North, Suite 200
Dearborn, MI 48120

ph. 313.271.2660 fax 313.271.2698

Training & Team Morale

In addition to increased outreach and marketing we will also conduct refresher trainings to ensure that each team member is well versed on all aspects of the WIOA policies and common measures as well the case management best practices that imperative for success in the program.

We recognize the importance of ensuring that the team is not only well trained but also in a healthy state of mind to perform their assigned duties. In partnership with Human Resources and our Talent Team, we will conduct quarterly professional development trainings and team building activities to increase morale and retention.

EDSI also offer a free employee assistance program that is available 24-7 to team members and their family that may be dealing with stress. As COVID-19 continues to impact our team in Tennessee, it is our goal to ensure their health and safety are a top priority.

Below is a list of the trainings that will be facilitated during Q2:

- WIOA and Northern Middle Tennessee Policy Review
- Case Management (Refresher)
- Case Notes – 3 Modules (Refresher)
- VOS Training (Alerts, Reports and Eligibility)
- Title VI Civil Rights
- Skilldex Assessments for OJTs
- Recruitment – Prescreening for Employers
- How to Have Difficult Conversations
- De-escalation and Conflict Resolution

Danielle Ellis

EDSI | Regional Director

E: DEllis@edsisolutions.com

Mobile: 917-804-8260



15300 Commerce Drive North, Suite 200
Dearborn, MI 48120

☐ ph. 313.271.2660 ☐ fax 313.271.2698

Enrollment

MAC understands that our Key Performance Indicators around new enrollments require that we enroll both in and out of school quarterly. To establish viable and ongoing referral links, we have made the following internal and external connections in the last four months. We will continue to nurture these connections to increase enrollment numbers.

Internal MAC Referral Resources:

- We are in the process of reaching out to the recipients of utility and rent assistance through MAC who are also between the ages of 17-24 and who are single parents to invite them to orientations and enrollments being held on Tuesdays and Thursdays at the AJC
- All Head Start parents between the ages of 17-24 have received a letter about the WIOA program and its eligibility, inviting them to self-refer
- We have presented to the MAC HiSet team regarding WIOA eligibility and the referral process; we have also presented at the regularly scheduled HiSet participant meeting regarding WIOA
- We are partnering with other MAC programs to participate in recruitment events for all MAC services, including a resource fair at John Henry Hale Public Housing on April 14th (EDSI is also invited to attend this event)
- All Opportunity NOW youth employment program applicants have received information regarding WIOA

AJC Referral Resources:

- AJC staff introduce all walk-ins under age 25 immediately to the Youth team
- We are partnering with EDSI to share information about the Youth program at orientation on Wednesdays and Fridays
- We have reached out to the Workforce Essentials Adult Education Director regarding referrals from and to that program

Community-based Referral Sources with Whom We Have Already Met:

- Martha O'Bryan Center's Reengagement Hub, which works to connect young people out of work and out of school from the East Nashville community with employment and education
- Martha O'Bryan Center's HiSet program, which is community-based targeting East Nashville and not funded through Adult Education dollars
- Martha O'Bryan Center's Academic Student Unions, after school academic and graduation support in three different Metro School (Stratford, Maplewood, and Hunters Lane)
- Monroe Harding's Reengagement Hub, which works to connect young people out of work and out of school from the North Nashville community with employment and education
- Monroe Harding's Education Services, which includes HiSet and online High School courses targeted to young adults. Also not funded through Adult Education dollars
- Monroe Harding's Independent Living Services, which includes several independent living homes for young adults who have aged out of foster care or who are have been victims of crime

- Monroe Harding's Works Wonders Program, an evidence-based work-readiness program for young adults disconnected from employment or chronically under-employed
- Oasis Center's Rapid Rehousing Services coordinated entry for youth who are experiencing homelessness
- Crossroads Campus coordinated employment, training, and independent living for young adults facing adversity
- Goodwill of Middle Tennessee
- Davidson County Juvenile Court and the Davidson County Juvenile Court Clerk
- Courtney Matthews and the Department of Children's Services Office of Independent Living
- Christina Scott with Youth Villages Independent Living
- Deanna Starnes with the Culinary Apprenticeship at Nashville State Community College
- Next Steps and Vanderbilt's Peabody College

Metro Nashville Public Schools-based Referral Resources with Whom We Have Already Met:

- The Simon Foundation Schools, including the Academy at Old Cockrill, the Academy at Opry Mills, and the Academy at Hickory Hollow, Metro Public Schools focusing on accelerated graduation and credit recovery for youth over age 18
- Keri Randolph, MNPS' Executive Officer of Strategic Federal, State, and Philanthropic Investments
- Megan Cusson-Lark, MNPS' Executive Director of School Counseling
- Office of the Academies of Nashville (Davidson County's CTE structure)
- Catherine Knowles, the McKinney-Vento program coordinator

In-School Expenses

Per State policy, 40% of funds must be spent on In-School Youth (ISY). These expenses include both staff and internal expenses as well as Participant Costs associated with ISY. Per our contact list above, we are actively working on recruiting ISY. However, our initial planned staffing pattern for the grant was to have 1.5 FTEs working with ISY, dedicating one staff person only to ISY and 50% of another person's caseload. However, because the caseload we inherited from Mid-Cumberland Workforce Services included only 1 ISY, we have been unable to meet this salary breakout for the first three months of the contract period. As a result, this expenditure gap is wider than the recruitment picture alone indicates.

Therefore, we are seeking to maximize expenditures on this population for this quarter. We are prioritizing ISY for work experience as well as targeting young people preparing to graduate from high school in May and June for incentives.

Work Experience Expenses

Per the WIOA Legislation, at least 20% of funds must be spent on work experience. Our contract stipulates that 25% of total expenses should be for work experience.

To meet that goal, we currently have two young people who are finishing up work experience in April and plan to employ 6 new young people this month. In May, we will expand that number to 16, and increase to 30 working in June. Our budget calls for approximately \$45,000 worth of work experience

expenses every six months. With an average monthly wage for work experience of \$900, these targets would let us reach approximately \$45,000 of new work experience direct participant expenses by the end of June.

In addition to participant wages, staff will continue to track their time spent supporting work experience development and implementation per the guidance received.

Minimum Participant Cost Rate

Per State policy, 40% of expenses should be spent directly on participants through supportive services, training costs, incentives, and work experience wages and benefits. These costs are designated as Participant Costs. Our contract stipulates that 50% of total expenses should be directed towards these Participant Costs. For the six-month period between January and June, we should expect to expend \$135,000 on Participant Costs.

- We anticipate spending \$45,000 on work experience wages and benefits
- We are targeting high school students for ISY recruitment and expect to spend \$10,000 on incentives for high school graduation, hiset, and training completion, in addition to other, smaller incentive payments for documented progress meeting the policy guidelines
- Ideally, we would be spending \$45,000 on supportive services during this period. However, many of the expenditures we would otherwise have had on things like rent and utilities are currently being picked up by CARES Act and other COVID relief programs. We are actively seeking to support our clients, both active and those newly in follow-up, but these expenses may not be as high as the original target because of other available resources.
- We anticipate spending \$30,000 during the period on ITAs. We currently have three people beginning the training process who should be billed in April and anticipate serving an additional six people through training through May and June.

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2020 FISCAL UPDATE
NORTHERN MIDDLE GRANT UTILIZATION

**Northern Middle's fiscal year-to-date grant utilization for ALL activities (to include Campbell Strong, a National Dislocated Worker grant and COVID-related CARES grants) has been noteworthy among Tennessee LWDA's at \$9.8M.*

Northern Middle LWDA	QTR 1	QTR 2	QTR 3	FY Expenses July thru Mar 2021
All Northern Middle Expenditures	3,442,786	3,970,364	2,411,782	\$ 9,824,932

** Northern Middle's Qtr 3 grant expenditures decreased by \$1.6M compared to Qtr 2 (which included CARES activity), and decreased \$1M compared to Qtr 1 of FY 2020-21.*

**The \$1.6M decrease relates to:*

- * \$1M decrease in Adult, Dislocated Worker and Youth expenditures impacted by Career Service Provider transitioning.*
- * \$600k decrease in CARES activity which ended the prior quarter.*

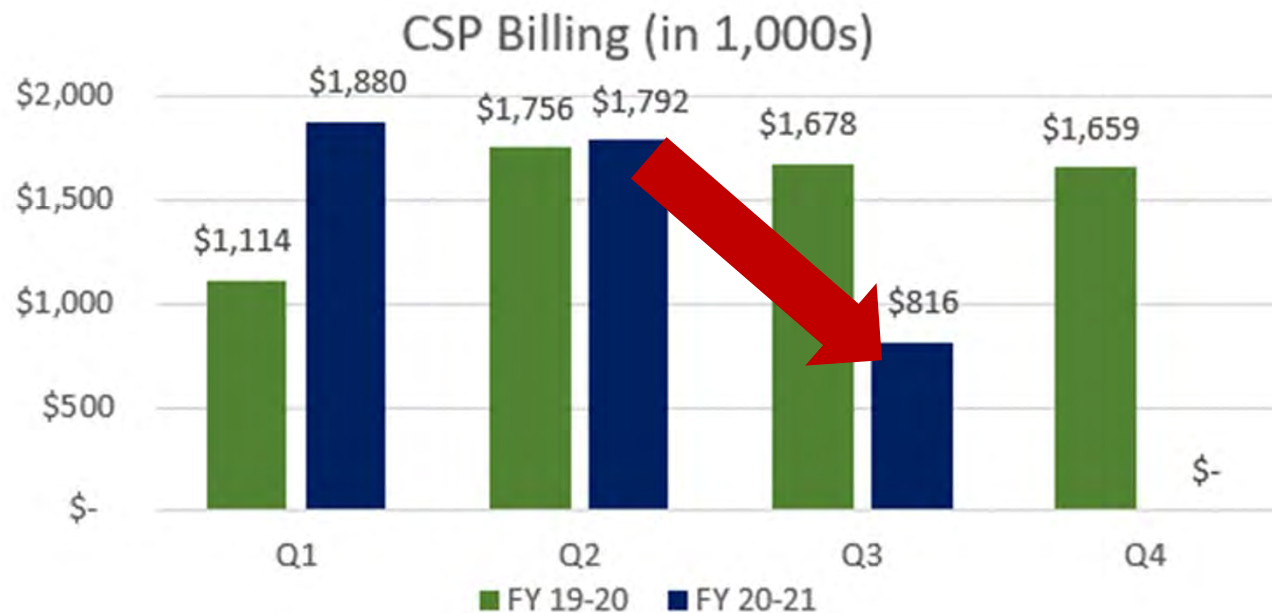
**NORTHERN
MIDDLE TN
WORKFORCE
BOARD
MARCH 2021
FISCAL
UPDATE**

**BUDGET TO
SPEND
PROGRESSION**

	(in 000's)					
	2020 QTR 1	2020 QTR 2	2020 QTR 3	Expenses YTD	12 Mo. Budget	% Spent
Northern Middle LWDA						
IFA	188	195	247	630	1,000	63.0%
Adult	820	848	477	2,145	3,057	70.2%
Dislocated Worker (\$300,000 for Adult *)	747	642	375	1,764	4,736	37.2%
Youth	672	658	321	1,650	2,802	58.9%
RESEA	20	35	16	71	126	56.6%
Campbell Strong	849	730	724	2,303	3,344	68.9%
National Dislocated Worker - 1	318	447	218	983	983	100.0%
Other State Initiatives (RD, CE, WB)	0	0	0	0	121	0.0%
Total FY 20-21 Base Budget AUG/NOV Meeting	3,426	3,360	2,131	8,917	15,170	58.8%
National Dislocated Worker - 1 Modification			132	132	165	80.3%
National Dislocated Worker - 2 Expires 6/2022			104	104	1,693	6.2%
Apprenticeship Grant	16	19	1	36	36	100.0%
CARES Consolidated Business Grant	0	352	16	367	370	99.3%
CARES Re-Employment Grant	0	239	7	247	249	99.1%
FY 20-21 Budget Modified FEB Meeting	3,443	3,970	2,391	9,804	17,683	55.4%
Statewide Administration - Regional Study			21	21	21	100.0%
RESEA Increase			0	0	42	0.0%
CARES Statewide Training			0	0	377	0.0%
Total FY 20-21 Expenditures vs Budget MAY Meeting	3,443	3,970	2,412	9,825	18,123	54.2%
Funding Increase - Budget Action Item					440	
* Re-purposed \$300,000 of Dislocated Worker funding to Adult						

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE
CONTRACTOR BILLING TREND

Transitioning contractors were underspent in their initial quarter. Contractor billing at 816k was only 49% compared to \$1.7M in Quarter 3 of last year; and 46% of last quarter's \$1.8M.



NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE
CONTRACTOR BILLING PROGRESSION

With 17% of time elapsed in the contract period, EDSI spent 7% and MAC spent 5% of their respective contract budgets. Expenditures are slowly ramping up for each contractor.

	In \$000's					
Career Service Provider Billing	Jan-21	Feb-21	Mar-21	Total Budget Spent	Total 18 Month Budget	% Spent - 17% time elapsed
EDSI - Incoming	\$ 187	\$ 204	\$ 235	\$ 626	\$ 8,370	7%
MAC - Incoming	\$ -	\$ 11	\$ 32	\$ 43	\$ 800	5%
MCHRA Outgoing	\$ 147			\$ 147		
Total Exp Q3 2020-21	\$ 334	\$ 215	\$ 267	\$ 816		

NORTHERN MIDDLE TN WORKFORCE BOARD

MARCH 2021 FISCAL UPDATE

CONTRACTOR PERFORMANCE

Quarter 3 contractor activity fell short of performance goals in all fund streams. Youth measures are significantly behind targets.

Educational Data Systems, Inc. (EDSI)

EDSI	MPCR - Goal 50%			Work Exp - Goal 25%	ISY/Youth - Goal 40%
	Adult	DW	Youth	Youth	Youth
CTD CUMULATIVE	12%	23%	14%	0%	1%
January 2021	0%	0%	17%	0%	0%
February 2021	16%	35%	16%	0%	0%
March 2021	18%	29%	11%	0%	1%

Metro Action Commission (MAC) Davidson - Youth

MAC	MPCR - Goal 50%	Work Exp - Goal 25%	ISY/Youth - Goal 40%
	Youth	Youth	Youth
CTD CUMULATIVE	17%	9%	4%
January 2021	100%	85%	0%
February 2021	19%	17%	1%
March 2021	15%	6%	6%

NORTHERN MIDDLE TN WORKFORCE BOARD

MARCH 2021 FISCAL UPDATE

MINIMUM PARTICIPANT COST RATE (MPCR)

TDLWD Minimum Participant Cost Rate (MPCR) - Preliminary Through March 2021

Without
Campbell Strong
or Disaster
Relief Grants

MPCR = 39.97%

MPCR dropped 4.9
percentage points

	Service Provider Youth	Provider Adult & Dislocated Worker	Campbell Strong excluded	Disaster Relief	CARES, Apprentice, Incumb Wkr	Other (NM & IFA)	Total
Qualifying Expense	\$ 617,333	\$ 1,431,007				\$ 5,326	\$ 2,053,665
Total Program	\$ 1,360,524	\$ 3,054,622				\$ 723,161	\$ 5,138,307
MPCR	45.37%	46.85%	-	-		0.74%	39.97%

Northern Middle dropped **below** the 40% Requirement in Quarter 3.

*** PRIOR QUARTER MPCR = 44.87% ***

NORTHERN MIDDLE TN WORKFORCE BOARD

MARCH 2021 FISCAL UPDATE

MINIMUM PARTICIPANT COST RATE (MPCR)

Participant Cost Rate - Through March 2021

Including
Campbell Strong
and Disaster
Relief Grants

MPCR = 56.90%

Drop of 2.48 percentage
points

	Service Provider Youth	Service Provider Adult &	Campbell Strong	Disaster Relief	CARES, Apprentice, Incumb Wkr	Other (NM & IFA)	Total
Qualifying Expense	\$ 617,333	\$ 1,431,007	\$ 1,326,448	\$ 1,073,717	\$ 724,539	\$ 5,326	\$ 5,178,369
Total Program	\$ 1,360,524	\$ 3,054,622	\$ 2,115,106	\$ 1,121,395	\$ 725,681	\$ 723,161	\$ 9,100,490
MPCR	45.37%	46.85%	62.71%	95.75%	99.84%	0.74%	56.90%

*** PRIOR QUARTER = 59.38% ***

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE

EXECUTIVE SUMMARY

CAMPBELL STRONG 3-YEAR PROJECT RECAP
(1-year, no-cost extension to 9/30/2021 granted)

Campbell Strong Project	Expenses	Budget	
Campbell Strong - Current fiscal year	2,303,133	3,343,629	68.9%
Campbell Strong Expenditures - Project-to-Date	6,709,552	\$ 7,750,048	86.6%

Direct Participant Expenses	Expenses	Budget	
Campbell Strong - Current fiscal year	1,326,448	1,685,331	78.7%
Campbell Strong Expenditures - Project-to-Date	3,641,117	4,000,000	91.0%

Campbell Strong Enrollments	Actual	Goal	
Participant Enrollments	1,620	2,000	81.0%

NORTHERN MIDDLE TN WORKFORCE BOARD

MARCH 2021 FISCAL UPDATE

MONITORING UPDATE

EDSI and MAC – Incoming Career Service Providers

- **Weekly contractor meetings; Staffing updates; Strategies in timely performance improvements.**
- **Expectations communicated; Dashboards discussed; Timelines for corrective action requested.**
- **Monthly invoice desk reviews with feedback; Corrective action responses obtained.**
- **Monitoring focus: CSP staffing, training for service delivery, performance objectives, eligibility, ETPL, invoicing and systems reconciliations.**

Mid Cumberland HRA

- **Outgoing Career Service Provider – Transitional issues including disallowed costs have been communicated with expected action. Adjustments are ongoing.**
- **Continuing One-Stop Operator – Northern Middle implemented a One-Stop Operator monitoring tool and MCHRA has provided responses requested.**

Campbell Strong – Workforce Essentials/West KY Workforce Board

- **Low total expenditures resulted in remaining funds at the end of the two year contract period. A twelve month no-cost extension with increased enrollment goals was granted.**
- **Northern Middle requested State technical assistance regarding completion of the project and continued funding.**

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE
2021-22 INITIAL BUDGET REVENUES

Grant Revenue	\$ in millions	\$
Carryover from 20-21	4.7	4,749,615.89
New Allocations	8.6	8,549,962.82
Total Adult, DW, Youth	13.3	13,299,578.71
Youth grant not available until 22-23	(2.9)	(2,917,504.56)
Carryover to 22-23 at 20% of Adult, DW	(1.1)	(1,126,491.65)
Total 21-22 Adult, DW, Youth	9.3	9,255,582.5
Campbell Strong	0.3	332,447.68
National Emergency DW	1.1	1,190,502.47
Rural Development	0.1	52,193.44
RESEA	0.1	100,000.00 *
IFA	1.0	1,000,000.00
Total 21-22 Projected Grant Revenue	11.9	11,930,726.08

* Pending 21-22 RESEA award

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE
2021-22 INITIAL BUDGET EXPENSES

Projected Expenses	\$ in millions	%	
NM Workforce Board (Admin & Program)	1.3	11%	1,265,645.00
Board Incumbent Worker Program	0.3	3%	300,000.00
IFA (non-Title I)	1.0	8%	1,000,000.00
Total Board and Overhead	2.6	22%	2,565,645.00
Campbell Strong Workforce Partnership	0.3	3%	332,447.68
National Emergency DW	1.1	9%	1,190,502.47
OSO	0.3	3%	301,399.88
CSP	7.4	62%	7,388,537.61
Rural Development	0.1	0%	52,193.44
RESEA	0.1	1%	100,000.00 *
Total Contracted Grant Services	9.3	78%	9,365,081.08
Total 21-22 Grant Expense	11.9	100%	11,930,726.08

* Pending 21-22 RESEA award

NORTHERN MIDDLE TN WORKFORCE BOARD
MARCH 2021 FISCAL UPDATE
ACTION

- * 2020-21 Financial Report and Budget Revision (+ \$440k) Approval
 - * 2021-22 Budget Approval (\$11.9M)

Northern Middle Key Performance Indicators

January 1, 2021 - December 31, 2021

Time progression 25%

PROGRAM	TARGET	Actual as of 3/31/2021	% of Goal
Adult, Dislocated Worker & NDWG (New Enrollments)	995	297	30%
Youth (New Enrollments)	403	39	10%
Adult Education (New Enrollments)	2151	506	24%
Adult Education/NICE (IELCE) (New Enrollments)	611	50	8%
Wagner Peyser	3851	1195	31%
Senior Community Service Employment Program (SCSEP) (Exits)	10	5	50%
Re-Employment Services & Eligibility Assessment (RESEA) (Co-Enrollments)	73	0	0%
Trade Adjustment Assistance (TAA) (Co-Enrollment Rate)	100.0%	50.0%	50%
Supplemental Nutrition Assistance Program Employment & Training (SNAP E&T) (New Enrollments)	630	295	47%
Jobs for Veterans State Grants (JVSG) (New Enrollments)	146	19	13%
Justice Involved Individuals (New Enrollments)	294	64	22%



STATE OF TENNESSEE
DEPARTMENT OF LABOR AND WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SERVICES
220 French Landing Drive
Nashville, TN 37243-1002
(615) 741-1031

Workforce Services Policy – Key Performance Indicators

Effective Date: June 18, 2021

Duration: June 30, 2023

Purpose:

The purpose of this policy is to establish key performance indicators (KPIs) as hard targets and to define the KPI performance period. Tennessee's KPIs demand streamlined service delivery and quality collaboration among all workforce partners. Each year, the latest set of KPI metrics are approved by the State Workforce Development Board (SWDB). Each quarter, the SWDB reviews KPI achievement-fostering sustained excellence, improved outcomes, and the promotion of workforce services to the greatest number of individuals with significant barriers to employment (SBE).

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)

Background:

To become the best public workforce system in the nation, KPIs quantify and track Tennessee's implementation of the Workforce Innovation and Opportunity Act (WIOA).

KPIs foster:

- Increased access to education, training, and employment- particularly for people with significant barriers to employment.
- A comprehensive, high-quality workforce development system by aligning workforce investment, education, and economic development.
- Improvement in the quality and labor market relevance of workforce investment, education and economic development efforts.
- Improvement in the structure and delivery of services.
- Increased family-sustaining employment, meet employer need, and enhance the productivity and competitiveness of Tennessee.

I. Key Performance Indicator (KPI) Scope:

The following are lists of KPI subjects. Key performance indicators are designed to deal with all WIOA programs, SBE groups and the connections between them. These lists are not exhaustive. Programs, groups, or sub-groups may be added or removed in alignment with state, regional, and local priorities.

A. Programs:

Business Solutions
Jobs for Veterans State Grants
Reemployment Services and Eligibility Assessment
Senior Community Service Employment Program
SNAP Employment and Training
Temporary Assistance for Needy Families (TANF)
Trade Adjustment Assistance
WIOA Title I - Adult and Dislocated Worker and Youth
WIOA Title II - Adult Basic Education and Integrated English Language and Civics Education
WIOA Title III - Wagner-Peyser
WIOA Title IV – Vocational Rehabilitation
YouthBuild

B. Significant Barrier to Employment Groups:

Individuals with SBEs include the fourteen (14) populations of:

- Displaced homemakers¹
- Low-income individuals or recipients of income-based public assistance²
- Native Americans³
- Individuals with mental or physical disabilities, including the recipients of Social Security Disability Insurance⁴
- Those age 55 and older⁵
- Justice-involved individuals⁶
- Individuals experiencing or have experienced homelessness⁷
- Youth in or have aged out of the foster care system

¹ WIOA Section 3(16)

² WIOA Section 3(36)

³ WIOA Section 166(b)

⁴ WIOA Section 3(25)

⁵ WIOA Section 3(39)

⁶ WIOA Section 3(38)

⁷ 'Homeless individual' is defined in the Violence Against Women Act of 1994 Section 41403(6); 'Homeless children and youths' is defined in the McKinney-Vento Homeless Assistance Act Section 725(2)

- Individuals who are:
 - English language learners⁸
 - Individuals who have low levels of literacy – unable to compute or solve problems, or read, write, or speak English at a level necessary in order to function on the job, in an individual's family, or in society
 - Individuals facing substantial cultural barriers – participants, at program entry, perceives themselves as possessing attitudes, beliefs, customs, or practices that influence a way of thinking, acting, or working that may serve as a hindrance to employment including non-traditional employment⁹
- Eligible migrant and seasonal farmworkers¹⁰
- Individuals within two years of exhausting lifetime TANF eligibility
- Single parents – including pregnant women
- Long-term unemployed – unemployed for 27 or more consecutive weeks¹¹
- Other groups as the Governor determines to have barriers to employment

II. Key Performance Indicator Roles and Responsibilities:

A. Roles and Responsibilities

The following identifies roles and responsibilities relating to KPIs:

1. State Workforce Development Board (SWDB):

- Provides the strategic vision for Tennessee's public workforce system
- Upon review of SWDB staff recommendation, determines state annual KPI targets
- Approves quarterly and annual KPI targets
- Monitors, on a quarterly basis, KPI achievement

2. State Workforce Development Board Staff (SWDB Staff):

- Recommend state target guidelines and for each KPI measuring device
- Following the KPI negotiations, submit a KPI target proposal to the SWDB
- Divides annual state target guidelines into Grand Planning Regions
- Reviews and analyzes LWDB staff KPI target proposals
- Leads KPI target negotiations with LWDB staff
- Runs and analyzes targeted KPI reports to identify trends, best practices, and areas for significant improvement
- Facilitates and leads KPI-related technical assistance
- Recommends the adoption or revision of piloted or established KPI measuring devices
- Analyzes the efficiency of WIOA funds in relation to KPIs
- Provides opportunities for improvement using monitoring, sanctions, and corrective action
- Creates public facing KPI dashboards

3. Regional Planning Councils:

- Identify and respond to regional strengths, weaknesses, opportunities, and threats
- Make a proposal to LWDBs on how best to divide regional KPI guidelines into LWDBAs

⁸ WIOA Section 203(7)

⁹ WIOA Section 3(37)

¹⁰ WIOA Section 167(i)(1-3)

¹¹ As defined by the United States Bureau of Labor Statistics' Current Population Survey

4. Local Workforce Development Boards (LWDB):

- Consider the KPI target proposal of the respective Regional Planning Council before independently submitting quarterly proposed KPI targets to SWDB staff for review
- The Executive Director negotiates KPI targets with SWDB staff
- Following KPI negotiation, submit a KPI target proposal to the SWDB staff

III. KPI Performance Period:

- A. Beginning July 1, 2021, KPIs in **Attachment 1** will become “hard targets”. Failure to achieve the hard targets will affect the LWDB performance and potential funding.
- B. KPI Performance Periods:
- Quarter 1: July 1 – September 30
 - Quarter 2: October 1 – December 31
 - Quarter 3: January 1- March 31
 - Quarter 4: April 1 -June 30
 - Year: July 1 – June 30
- C. The following are key dates for the establishment of KPI targets for the performance year:
- February 1: SWDB staff issues annual target guidelines to the Regional Planning Councils.
 - March 1: LWDBs submit proposed quarterly and annual targets to the SWDB staff.
 - March 15 -March 31: Negotiations occur between LWDB staff and SWDB staff.
 - May 15: All WIOA Assistant Commissioners and LWDB Chairs submit all proposed annual and quarterly KPI targets for the performance period to the SWDB for approval.

IV. Monitoring and Technical Assistance:

The KPI assessment weight and the KPI achievement scale are the two tools for KPI evaluation. SWDB staff use these tools to monitor each KPI measuring device and rapidly implement a graded response in accordance with each KPI achievement level and subject-matter expertise.

A. Assessment Weight:

The KPI assessment weight tool outlines the percentage each evaluation period is valued relative to the final KPI score. As shown in the table below, each period of evaluation is weighted equally at 20 percent- requiring year-round excellence.

Evaluation Period	Weight
Quarter 1	20%
Quarter 2	20%
Quarter 3	20%
Quarter 4	20%
Annual	20%
Total	100%

B. Achievement Scale:

As indicated below, the KPI assessment scale tool has six (6) levels of KPI achievement. This tool rapidly identifies best practices and opportunities for improvement. By evaluating the achievement of each KPI measuring device, SWDB staff responses can be prioritized to improve efficiency and strategic alignment. Each KPI measuring device will measure each program and SBE group.

Achievement Levels
0- Unacceptable
1- Needs Significant Improvement
2- Needs Improvement-
3- Approaching Target
4- Target achieved
5- Best practice- significantly above target

If the achievement of a KPI measuring device is determined to be either “unacceptable”, “needs significant improvement” or “needs improvement”- those devices are required for corrective action as outlined within the *Sanctions for Failure to Meet Federal and State Standards* policy. This achievement group requires significant assistance to achieve state, regional, and local goals.

The appropriate response to KPI measuring devices within the “approaching target” achievement level should be dictated in part due to a trend analysis. The KPI measuring devices within this group may have fluctuated and may be subject to sanctions. This achievement group should minimize ineffective methods in service delivery and maximize opportunities for future growth.

Monitoring conducted through annual reviews of fiscal and program requirements will inform the corrective action process if the reviews result in a finding(s). After the monitoring review is conducted, an exit conference will be scheduled with the sub-recipient to discuss any findings or observations. An official written report will follow the exit conference to list out the findings and/or observations. This report will provide instruction on how, where, and when to submit a corrective action plan. The written report will be sent to the sub-recipient within thirty (30) business days from the exit conference. After the report is received by the sub-recipient, they will have thirty (30) business days to submit that information to Workforce.Board@tn.gov. Any communication regarding the submitted Corrective Action Plan will need to be responded to within thirty (30) business days.

KPI measuring devices that are either “target achieved” or “significantly above target” are the most likely sources of best practices. Peer-to-peer learning and further improved coordination among WIOA partners should be encouraged to attain better or more reliable attainment of KPI targets.

For example:

LWDA X has a Title I Adult KPI goal of 180 new enrollments, with the program-specific achievement thresholds as listed in the table below.

Achievement Levels	Thresholds
0- Unacceptable	0 to 20%
1- Needs Significant Improvement	21 to 50%
2- Needs Improvement-	51 to 70%
3- Approaching Target	71 to 90%
4- Target achieved	91 to 110%
5- Best practice- significantly above target	110%+

Evaluation Period	Target	Actual	Percentage	Weight	Title I Adult KPI Score	Achievement Level
Quarter 1	40	35	87.5%	20%	17.5	Approaching Target (3)
Quarter 2	40	30	75.0%	20%	15.0	Approaching Target (3)
Quarter 3	60	45	75.0%	20%	15.0	Approaching Target (3)
Quarter 4	40	50	125.0%	20%	25.0	Best Practice (5)
Annual	180	160	88.0%	20%	17.6	Approaching Target (3)
				100%	90.2	Target Achieved

Accompanying this evaluative process is the proactive provision of comprehensive quarterly technical assistance (TA). This TA prioritizes all state, regional, and local strategic goals, fosters the promotion of best practices, and provides opportunities for further collaboration among geographic areas and workforce partners.

In combination with fiscal and compliance-based metrics, high levels of KPI achievement indicate high achieving LWDBs which may be eligible to receive performance-based incentive contracts.

Attachments:

Attachment 1: Negotiated Key Performance Indicator Targets

Contact:

For any questions related to this policy, please contact the Program Integrity Unit at Workforce.Board@tn.gov.

State Workforce Development Board Chair, Tim Berry

Catholic Charities of Tennessee, Inc.

Northern Middle Workforce Board- FY21-22 Trades Training Proposal

The need- why is there a need in North Nashville to have access to training in the trades.

North Nashville, a historically underserved African-American community, like many urban cores, is experiencing a resident migration. Many residents have lived in North Nashville for most or all of their life and are eager for opportunities to help them thrive where they are. Residents desiring to stay in their homes often need a number of supports including workforce development. The Catholic Charities Family Resource Center (FRC) at McGruder provides residents with many opportunities, but none more significant than connecting families to meaningful employment in Nashville's growing business sectors. In addition to workforce development the FRC has over twenty co-locating partners to help with basic needs case management (rent, utility, mortgage, and food assistance), housing stability, counseling, transportation, financial literacy, soft skills, resume writing, after-school programming, etc. This model of wraparound programming provides stability for many of the hurdles our clients face. The FRC is in the process of collaborating with Workforce Essentials to establish an American Jobs Center access point on-site in North Nashville.

Nashville is graced by unprecedented growth deeming it the "it city," boasting an unemployment rate significantly lower than the national average and increases in corporate relocations. This growth has not benefited all segments of our city equally. Gentrification moved through easily accessible parts of the community causing displacement, thus removing vulnerable residents from the urban job core. Federally designated Promise Zone 5, which is a historically African American district in North Nashville, is in the epicenter of this economic tug-and-pull. However, the FRC works with many adults and young adults in the community that are hopeful that they can pursue their life goals while living in North Nashville. Two workforce development pathways, culinary training and sewing training, are already in place and being utilized at the FRC. Multiple onsite partners provide entrepreneurial training which has helped business-minded clients start their own local catering and alteration services. Despite the rich culture and history of this community, there are challenges. The overall population continues to lack the discretionary income to attract desired retail and restaurants. Per capita income is below the county average at \$15,859 (American Community Survey, 2011-2015), and according to a Brookings Institute report from 2018, 14 percent of people who grew up in the 37208 zip code between 1980-1986 have been incarcerated (three points higher than the next highest nationally ranked neighborhood).

The FRC provides resident-driven and industry-informed workforce development programs for low-income North Nashville residents seeking upward mobility. By co-locating the significant resources that exist here, residents will be better able to access the tools to overcome the complex challenges that prevent them from achieving economic success. The approach is to meet clients where they are, both figuratively and literally. Services are located in the community to help minimize, if not eliminate, transportation barriers. Co-locating services in one location helps

to address multiple needs of individuals and family members. Onsite there is programming for the arts, an auditorium where residents host performances of plays they created, a safe place for the neighborhood to play basketball and soccer, and a vibrant community garden. The FRC has been assisting North Nashville since 2003 while Catholic Charities (founded in 1962) has had a presence in the immediate community for over 30 years.

The Need for Skilled Trades

According to the In Demand Occupations to 2026 report by the State of Tennessee, skilled trades are in high demand in Nashville. The data shows that trades such as heating, air conditioning, and refrigeration mechanics and installers have approximately 435 job openings a year, with an average salary of \$43,278. Similarly, the trade of plumbers, pipefitters and steamfitters average 350 job openings a year with an average yearly salary of \$47,369. Currently, Catholic Charities provides services to over 12,000 middle Tennessee residents a year. The FRC in North Nashville annually serves 1,200 individuals, with 90% classified as low to moderate income. With these two trade industries having nearly 800 job openings a year, it is crucial that Catholic Charities be able to help provide access to skilled trade training for our clients in the North Nashville community. Looking at the Department of Labor statistics for in-demand jobs for Davidson County, the creation of the trades program will give residents in North Nashville and disproportionately underserved communities access to innovative and quality programming that are accessible and creates opportunities to provide a living wage and increase in quality of life.

Program Methods and Outcomes

The Trade Training pilot program is designed for four cohorts of eight-week classes, with ten individuals enrolled in each course. Over the course of a year the pilot would serve up to forty students with a cost per client of \$1591. Classes would be taught by licensed community partners who are our contractors. Over its first year Catholic Charities plans to offer alternating courses of Plumbing and HVAC training at the FRC. Tracking the interest and enrollment in both programs will help our team make adjustments to ensure we are serving the greatest need in the community. At the end of the course the students will not only have the education and training needed to be employable in the field they studied, but also will receive job placement assistance from the FRC, which includes resume writing assistance, job interview coaching, and financial literacy education. An unused wing of the building, which was formerly an elementary school, is being renovated to focus solely on workforce development programming. Metro government is investing over \$2,000,000 into the property so that these eight classrooms can house the job training opportunities that the community members are requesting. Pre-apprenticeship opportunities will be offered in classroom-based programs where students will learn the basic skills to enter into a trade. Our pre-apprenticeship path is a partnership with local trade employers designed to prepare individuals to enter and succeed in a Registered Apprenticeship Program (RAP).

This program will also be accessible to all of our neighbors, with a focus on neighbors who were formerly justice-involved. The FRC is forging a potential partnership with the Davidson County Sheriff's Office (DCSO) to assist in the continuing training of the DCSO trades and Adult Education programs. Also, the FRC is home to Judge Rachel L. Bell's Music City Community Court and LEGACY Housing Resource Diversionary Court and Program. In addition to the presence of Judge Bell's Courts, the relationships between the FRC, DCSO, and Judge Bell's Courts have informed our focus on the critical need to support our neighbors that have been involved in the justice system and are returning to our community. The creation of this program would be one way to provide a pathway to success.

Catholic Charities of Tennessee, Inc.
Workforce Development Expansion Project Budget
FY21-22

Expenses	Project Total	Description
Instructor Fees	\$ 20,000	Fees for a full year instructor for 4 days a week Employee for 15 hrs a week to manage instructors and students, oversee recruitment, enrollment, and other administrative duties for this program.
Program Assistant	\$ 11,700	
Indirect Cost	\$ 5,785	Calculated at 10% Hand and power
Tools	\$ 3,200	tools This covers a full year/curriculum
Class Project Materials	\$ 2,500	materials. Materials involved in Lab setup, not including classroom
Lab Materials	\$ 5,100	desks)
Student table	\$ 1,500	Quantity: 10
Chairs	\$ 1,500	Quantity: 20
Workbench	\$ 1,250	Quantity: 5
Whiteboard	\$ 300	Quantity: 1
Computer	\$ 1,200	Quantity: 1 (1) Large HDTV or projector with screen
Display	\$ 300	(1) Video/audio for content creation and capture
Multimedia	\$ 500	(40) Consumable learning materials such as handouts, binders, writing utensils, books, basic
Learning materials	\$ 6,000	hand tools
Field trips	\$ 800	Quantity: 8 Applications/authorizations e.g. THEC or similar trade
Fees	\$ 1,200	credentials Trade organizations e.g. ACCA (HVAC) PHCC (Plumbing) - not firm these are just examples
Memberships	\$ 800	
TOTAL PROJECTED EXPENSES	\$ 63,635	
Number of students served	40	
Cost per student:	\$1,591	