

ATTACHMENT H

INSTRUCTIONS FOR COMPLETING FY2024 PROGRAM SUMMARY CHARTS

Instructions for Completing Program Summary Charts S and 1 - 4

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Instructions for Plan Modifications

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Participant Planning Data

Local areas should refer to the CCPR data published on the MassWorkforce website (<https://www.mass.gov/massworkforce-career-center-performance-reports-ccpr>). The plan versus actual data can be used to mark trends and to identify patterns where low or high plan levels make any plan vs. actual analysis meaningless. Plan reviewers also will make use of these charts with the result that local areas may be requested to resubmit or justify plans based on past patterns.

Deadline for Program Summary Charts

The Program Summary Charts must be submitted by email to Lisa Caissie at Lisa.J.Caissie@mass.gov by October 20, 2023.

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INSTRUCTIONS FOR COMPLETING PROGRAM SUMMARY CHARTS S & 1-4

The Excel Workbook comprising Program Summary S & Charts 1-4 is a separate attachment. The Excel Workbook *Charts S & 1-4 should not be split up or submitted/resubmitted separately*. Each submittal or resubmittal of the workbook is considered to be the current copy of the area's planning summaries. If changes are made after the initial submittal, *Chart S must be updated to indicate which Charts have new data*.

*Note that data cells shown in **Bold Blue** font are password protected because they contain formulas. You cannot enter data in these cells.*

Chart S – Submittal History – Required with Initial Submittal and Updates

The first spreadsheet is Chart S, Submittal History. Enter the date (this cell is formatted as m/d/yyyy). Also indicate for each Chart 1-4 if it has been modified by a Y for yes or N for no.

Chart S must be completed each time one or more program summary charts is submitted.

Please submit the entire workbook to Lisa Caissie at Lisa.J.Caissie@mass.gov

Chart 1 – FY2024 Labor Exchange Program Summary

Columns B-D – provide data from the OSCCAR reports in MOSES at the Workforce Area level.

Column E – estimate the number of individuals or employers who will be served during Fiscal Year 2024 in each of the given categories. Bold blue cells are password protected and will calculate automatically.

Charts 2 and 3 – Adult Program and Dislocated Worker Program Summaries

Columns B and C and D

Generally, Column D is calculated from data in Column B (carry-in from FY2023) and Column C (new in FY 2024). Bold blue cells are password protected and will calculate automatically.

In Column D, Line 2.a, provide the number of program exiters who will enter employment. The Entered Employment Rate will be calculated on Line 4. The EE rate should compare favorably to your performance goals for entered employments from the Adult and Dislocated Worker programs.

Enter the Average Hourly Wage at Placement in Column D, Line 2.a.i. The hourly wage should not be below the Massachusetts Minimum Wage of \$15.00 per hour. (For additional information refer to the MA Department of Labor Standards on the mass.gov website.)

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Line 5: Total Participants in Training Activities

Provide the single count of unique individuals who will receive training services on Line 5. In Column B (Formula Carry-in from FY2023) count every carry-in participant on Line 1 who is in training in FY2023 and will continue in the same or new training in FY2024, or who has completed training but has not been exited from the program. In Column C (Formula New in FY2024) count every new participant on Line 1 who will be newly enrolled in training in FY2024.

Line 5 a-d: Participants in Training Activities

Provide the number of individuals in each training activity on Lines 5.a – 5.d that apply. For example: an individual who will receive ESOL and occupational skills training will be counted once on Line 5, once on Line 5.b and once on Line 5.c. An individual who will receive occupational skills training through a group contract will be counted once on Line 5, once on Line 5.c and once on Line 5.c.ii. Line 5.c.i + Line 5.c.ii should never be greater than Line 5.c.

The sum of 5.a + 5.b. + 5.c + 5.d must be equal to or greater than the total on Line 5.

Line 6: Training Participants Obtaining Certificate/Credential

Provide the number of Line 5 training participants who will obtain a certificate or credential. Line 6 cannot be greater than Line 5.

Line 7: Support Services

Provide the number of individuals who will receive any support services on Line 7 and the number of individuals who will receive a needs-based payment on Line 7.a. Enter zero (0) if applicable.

Chart 4 –Youth Program Summary

Entries in Column D represent the sum of entries in Column B (In School Youth) and Column C (Out of School Youth). Column D cells are bold blue so will calculate automatically.

Line 1: Participants (Sum of Line 1.a and 1.b)

Line 1 youth participant totals will be calculated from the entries in Line 1.a (new enrollments during FY2024) and Line 1.b (carry-overs from FY2023). Line 1 cells are bold blue so will calculate automatically.

Line 1

Provide the number of Title I youth program participants by in-school and out-of-school to be served with FY2024 WIOA Youth funds.

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Line 1.a, New Enrollments

Provide the number of new FY2024 enrollments to be served with FY2024 WIOA Youth funds.

Line 1.b, Carry-overs from FY2023

Provide the number of Youth to be carried in from FY2023.

Line 1.c-f, Age Breakouts

Lines 1.c, 1.d, 1.e, and 1.f are the age breakouts for participants on Line 1. Thus, the sum of Line 1.c + Line 1.d + Line 1.e + Line 1.f = Line 1.

Lines 2 and 2.a-c, Program Exiters

Provide the number of youth who will exit youth funded services in the appropriate categories on lines 2.a-c. Line 2, total program exiters, will be calculated from data entered in Lines 2.a-c. Line 2 cells are in bold blue so will calculate automatically.

Line 3, Carry-Out to FY2025

The number of youth to be carried out into FY 2025 is calculated as the number of youth participants on Line 1 minus the number of program exiters on Line 2. Line 3 cells are in bold blue so will calculate automatically.

Line 4, Employment or Education Rate

The employment or education rate is calculated as the number of youth who enter employment (Line 2.a) plus the number of youth who enter post-secondary education or training (Line 2.b) divided by the number of exiters (Line 2).

Lines 5. a-n, Enrollments in the Fourteen (14) Program Elements:

Provide the number of youth who will participate in each of the fourteen (14) program elements that apply. The sum of Lines 5.a-n should be equal to or greater than the total number of participants in Line 1. The sum of Lines 5.a-n cannot be less than Line 1.

Line 6., Attained Diploma/Degree/HiSET/Certificate

Provide the number of in-school youth (column 6.b) and out-of-school youth (column 6.c) who will attain a diploma, degree, HiSET, or certificate. Line 6 cell in column D is bold blue and will calculate automatically.

Line 7, Attained Degree/Diploma/HiSET/Certificate Rate (=6/2)

Blue bold cells calculate the certificate rates for In-School Youth (column B), Out-of-School Youth (column C) and FY2024 TOTAL (column D) automatically by dividing the number that attained in each column on Line 6 by the number of program exiters in each column on Line 2.

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INSTRUCTIONS FOR PLAN MODIFICATIONS

Reminder: the Excel workbook comprising Program Summary Charts 1-4. *Charts 1-4 should not be split up or submitted/resubmitted separately.* Each submittal or resubmittal of the workbook is considered to be the current copy of the area's planning summaries. *Charts 1-4 are maintained as a group.*

Final FY2023 Carry-Over Data

Local areas are asked to estimate carry-over planning numbers for FY2023 based on the best information available during the planning season. **Plan modifications based on final budget or carry-over data available in the first quarter of FY2024 should be submitted by email to Lisa Caissie Lisa.J.Caissie@mass.gov for approval.**

Resubmitting Charts for Changes, Corrections and Budget Modifications

During the review period and later during the fiscal year, local areas may have cause to update one or more of Charts 1-4. For example, moving funds from Adult to Dislocated Worker may alter planned participant levels. Please follow the guidelines below with respect to submitting changes to Charts 1-4.

1. Enter a modification number and date in the box at the top of each Chart that has a change.
2. If possible, please identify the changed data by some means so that it is apparent to a reviewer. This is not necessary if changes involve most of the data on the form.
3. Complete Chart S (Submittal History) and return the entire workbook with the complete set of Charts 1-4 even if only one chart has been modified. Charts 1-4 are maintained as a group. Thus, the most recent submitted version of the Program Summary workbook replaces the previously version as the current set of fiscal year planning summaries for the area.
4. Plan data provided on Charts 1-4 are used for plan vs. actual comparisons in the *Career Center Performance Reports* (CCPR) and other analyses of program activity.

The deadline for submitting modifications to the FY2024 local plan summary charts is March 31, 2024.