

ATTACHMENT I

INSTRUCTIONS FOR PROGRAM & PERFORMANCE CHARTS **IN ATTACHMENTS G AND H**

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ATTACHMENT G, CHARTS 1 - 4

Charts 1-4, Attachment G, described below (and provided in an accompanying Excel file) must be completed and submitted as part of the FY 2009 Annual Business Plan.

- a. Complete **Chart 1, FY 2009 Labor Exchange Program Summary** indicating planned levels for job seekers and employers.
- b. Complete **Chart 2, FY 2009 WIA Title I Program Summary for Adults and Dislocated Workers**.
- c. Complete **Chart 3, FY 2009 WIA Title I Program Summary for Youth**.
- d. Complete **Chart 4, FY 2009 Performance Goals**, indicating the WIB goals for each of the performance measures. If the proposed local Performance Goals include baseline or negotiated adjustments, a description of each proposed adjustment *must be provided* in Attachment H, FY 2009 Performance Goals Statement. If baseline adjustments are taken these must be entered into the *Performance Adjustment Calculator* on the Chart 4 excel spreadsheet to adjust the local goals before submitting Chart 4 with the plan. See instructions below for Attachment H.

September Plan Modifications

Local areas are asked to estimate carry-over planning numbers for FY 2009 Charts 1-3 based on the best information available during the planning season. Plan modifications based on final carry-over data available in the first quarter of FY 2009 should be submitted to Diane Hurley for approval by September 14, 2008. This will allow time for approval and for the Performance Reporting Unit to update planning figures to be reported in the FY 2009 Career Center Performance Reports beginning with the quarter ending September 30, 2008.

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ATTACHMENT H, FY 2009 PERFORMANCE GOALS STATEMENT

Local areas must complete the two-paged Attachment H and submit it with their plan.

The first page is the *Performance Goals Statement*, shown below. Each Board must determine if they are adopting the state Title I performance goals *as shown on Chart 4 of Attachment G*, or taking the standard baseline adjustments, or requesting negotiation on one or more goals.

The second page of Attachment H is the *Performance Adjustment Worksheet*. These standard baseline adjustments data are used to adjust local WIA Title I Performance Goals on Chart 4 (Attachment G) for areas that are requesting to take the standard baseline adjustments.

FY 2009 PERFORMANCE GOALS STATEMENT

Enter the name of the Workforce Board

WORKFORCE INVESTMENT BOARD

Wagner-Peyser Performance Goals

Workforce areas are not required to set local goals for Wagner-Peyser Performance. Each area's performance will be reported against the FY2009 State Goals for Wagner Peyser, which are:

Entered Employment Rate	61%
Employment Retention Rate	81%
Average Earnings	\$16,400

Title I Performance Goals

Submit this form to indicate if the Board is adopting the state Title I performance goals for FY2009 shown in Chart 4, or is instead taking adjustments and/or requesting negotiations. Please indicate below the statement(s) that apply. If (b) is checked, please complete the *Performance Adjustment Worksheet*. If (c) is checked, please describe the basis for negotiation below and/or on additional sheets.

- _____ (a) The Board adopts the FY 2009 State Goals for FY 2009 Local Goals.
- _____ (b) Standard Baseline Adjustments have been taken. The Performance Adjustment Worksheet is attached. Adjustments have been entered in the Adjustment Calculator attached to Chart 4 and the adjusted local goals appear in Chart 4.
- _____ (c) The Board requests negotiation of one or more goals, as described below.

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Workforce Investment Board Name: type name here
Performance Adjustment Worksheet
(Sample Entries Shown)

ADULT ADJUSTMENTS

Employment, Credential & Retention Rates	Adjustment	Average Earnings	Adjustment
Less Than HS	<u>-2</u>	Less Than HS	<u>-\$325</u>
Limited Eng.	<u>-1</u>	Limited Eng.	<u>-\$165</u>
Disabled	<u>0</u>	Disabled	<u>-\$165</u>
Welfare	<u>-1</u>	Welfare	<u>-\$325</u>
Unemployment	<u>-1</u>	Area Wage	<u>-\$325</u>
Total Adjustment	-5	Total Adjustment	-\$1305

DISLOCATED WORKER ADJUSTMENTS

Employment, Credential & Retention Rates	Adjustment	Average Earnings	Adjustment
Less Than HS	<u>-2</u>	Less Than HS	<u>-\$325</u>
Limited Eng.	<u>-1</u>	Limited Eng.	<u>-\$165</u>
Disabled	<u>0</u>	Disabled	<u>-\$165</u>
Welfare	<u>-1</u>	Welfare	<u>-\$325</u>
Unemployment	<u>-1</u>	Area Wage	<u>-\$325</u>
Total Adjustment	-5	Total Adjustment	-\$1305

OLDER YOUTH ADJUSTMENTS

Employment, Credential & Retention Rates	Adjustment	Earnings Gain	Adjustment
Less Than HS	<u>-2</u>	Less Than HS	<u>-\$325</u>
Limited Eng.	<u>-1</u>	Limited Eng.	<u>-\$165</u>
Disabled	<u>0</u>	Disabled	<u>-\$165</u>
Welfare	<u>-1</u>	Welfare	<u>-\$325</u>
Unemployment	<u>-1</u>	Area Wage	<u>-\$325</u>
Total Adjustment	-5	Total Adjustment	-\$1305

YOUNGER YOUTH ADJUSTMENTS

Skill Attainment, Diploma & Retention Rates	Adjustment
Less Than HS	<u>-2</u>
Limited Eng.	<u>-1</u>
Disabled	<u>0</u>
Welfare	<u>-1</u>
Unemployment	<u>-1</u>
Total Adjustment	-5

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FY2009 PERFORMANCE ADJUSTMENTS FOR TITLE I

Local Title I performance goals may be adjusted/lowered from the state levels based on area economic conditions, and based on the percent of jobseekers served that are in hard-to-serve participant groups. The charts on the following pages provide all local data that will be needed to calculate local performance adjustments.

The performance measures may be adjusted downward by the amount indicated, based on historical service levels for the various factors. The total adjustment for any measure is the sum of the adjustments for each individual factor, as shown in the Performance Adjustment Worksheet example on page 4.

Please note that approval of requested baseline adjustments will be considered in light of the impact on the statewide goals.

Completing the Performance Adjustment Worksheet

Complete page 2 of Attachment H (*Performance Adjustment Worksheet*) by identifying the standard adjustments for your area using the data provided on pages 7-12.

Refer to Attachment G and the **Performance Adjustment Calculator** in the excel spreadsheet for Chart 4, FY2009 WIA Title I Performance Goals.

Enter the Total Adjustment data from the *Performance Adjustment Worksheet* in Column F of the Performance Adjustment Calculator on the Chart 4 excel spreadsheet. The data in the *FY 2009 Local Goals* column on Chart 4 will be automatically adjusted accordingly.

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Requests to Negotiate Expected Levels of Performance

Local areas may request negotiation of additional adjustments based on factors not adequately addressed in the standard baseline adjustments. The state will review any proposed alternative factors submitted and will compare the proposed performance levels with the statewide averages and with available baseline information. The negotiation process will take into account various factors with potential impact on expected levels of performance, including local differences in economic conditions, the characteristics of participants, and the services provided.

A review of the proposed local adjustments for each performance level, and the adequacy of any information local WIBs offer to substantiate each performance level, will be the core of the negotiation process. For any factors that are in addition to the above baseline adjustments, the state will analyze the quality of the data presented by the WIB, including the relevance of the data, the source and timeliness of the data, and if the data is part of a trend or anomalous. If, after its analysis, the state determines that the factors and adjustments do not support the performance levels proposed by the WIB, the state will negotiate with the local WIB to obtain mutually agreed upon expected levels of performance. The state will complete its analysis and negotiations in a timely manner, with final approval of the local performance measures to be provided as part of the plan review and approval process.

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ADULTS

Baseline Adjustments for Adult Entered Employment, Retention, and Credential Rates						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
Less Than HS	Up to 16%	None	17% - 24%	- 1	25% & over	- 2
Limited English	Up to 12%	None	13% - 22%	- 1	23% & over	- 2
Disabled	Up to 10%	None	11% - 17%	- 1	18% & over	- 2
Welfare	Up to 40%	None	41% - 54%	- 1	55% & over	- 2
Unemployed Rate	Up to 4.5%	None	4.6% -5.5%	- 1	5.6% & over	- 2

Baseline Adjustments for Adult Average Earnings						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
Less Than HS	Up to 16%	None	17% - 24%	- \$325	25% & over	-\$650
Limited English	Up to 12%	None	13% - 22%	- \$165	23% & over	-\$325
Disabled	Up to 10%	None	11% - 17%	- \$165	18% & over	- \$325
Welfare	Up to 40%	None	41% - 54%	- \$325	55% & over	-\$650
Area Wage	\$45,000 +	None	\$37,000 – 44,999	-\$325	LT \$37,000	-\$650

DISLOCATED WORKERS

Baseline Adjustments for Dislocated Worker Entered Employment, Retention, and Credential Rates						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
Less Than HS	Up to 11%	None	12% - 18%	- 1	19% & over	- 2
Limited English	Up to 8%	None	9% - 16%	- 1	17% & over	- 2
Disabled	Up to 5%	None	6% - 9%	- 1	10% & over	- 2
Age 55 or Older	Up to 20%	None	21% - 24%	- 1	25% & over	- 2
Unemployed Rate	Up to 4.5%	None	4.6% -5.5%	- 1	5.6% & over	- 2

Baseline Adjustments for Dislocated Worker Average Earnings						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
Less Than HS	Up to 11%	None	12% - 18%	- \$650	19% & over	-\$1300
Limited English	Up to 8%	None	9% - 16%	- \$650	17% & over	-\$1300
Disabled	Up to 5%	None	6% - 9%	- \$325	10% & over	- \$650
Age 55 or Older	Up to 21%	None	22% - 28%	- \$325	28% & over	- \$650
Area Wage	\$45,000 +	None	\$37,000 – 44,999	- \$650	LT \$37,000	-\$1300

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OLDER YOUTH

Baseline Adjustments for Older Youth Entered Employment, Retention, and Credential Rates						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
HS Dropouts	Up to 59%	None	60% - 70%	- 1	71% & over	- 2
Pregnant/Parent	Up to 30%	None	31% - 42%	- 1	43% & over	- 2
Disabled	Up to 14%	None	15% - 20%	- 1	21% & over	- 2
Basic Skills Def.	Up to 59%	None	60% - 69%	- 1	70% & over	- 2
Unemployed Rate	Up to 4.5%	None	4.6% -5.5%	- 1	5.6% & over	- 2

Baseline Adjustments for Older Youth Earnings Gain						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
HS Dropouts	Up to 59%	None	60% - 70%	- \$65	71% & over	- \$125
Pregnant/Parent	Up to 30%	None	31% - 42%	- \$65	43% & over	- \$125
Disabled	Up to 14%	None	15% - 20%	- \$65	21% & over	- \$125
Basic Skills Def.	Up to 59%	None	60% - 69%	- \$65	70% & over	- \$125
Area Wage	\$45,000 +	None	\$37,000 – 44,999	-\$225	LT \$37,000	-\$450

YOUNGER YOUTH

Baseline Adjustments for Younger Youth Skill Attainment, Diploma, and Retention Rates						
Factor	Service Level Range	Adjustment	Service Level Range	Adjustment	Service Level Range	Adjustment
Welfare	Up to 24%	None	25% - 29%	- 1	30% & over	- 2
Disabled	Up to 30%	None	31% - 39%	- 1	40% & over	- 2
Limited English	Up to 8%	None	9% - 15%	- 1	16% & over	- 2
Basic Skills Def.	Up to 59%	None	60% - 69%	- 1	70% & over	- 2
Unemployed Rate	Up to 4.5%	None	4.6% -5.5%	- 1	5.6% & over	- 2

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FY2009 TITLE I PERFORMANCE GOAL ADJUSTMENTS

Baseline Adjustments for Unemployment Rate		
Workforce Investment Area	CY2007 Unemployment Rate*	FY2009 Baseline Adjustment
Berkshire County	4.4%	None
Boston	4.4%	None
Bristol County	5.6%	- 2
Brockton Area	4.9%	- 1
Cape Cod and Islands	4.5%	None
Central Mass	4.8%	- 1
Franklin/Hampshire	4.0%	None
Greater Lowell	4.6%	- 1
Greater New Bedford	6.1%	- 2
Hampden County	5.6%	- 2
Lower Merrimack	5.1%	- 1
Metro North	3.7%	None
Metro South/West	3.4%	None
North Central	5.1%	- 1
North Shore	4.4%	None
South Coastal	4.4%	None
Statewide Average	4.5%	

*MA Labor and Workforce Development website, Economic Data, March 2008

Baseline Adjustments for Average Area Wages				
Workforce Investment Area	CY2006 Average Area Wage	Adjustment for Adult Average Earnings	Adjustment for Dislocated Worker Average Earnings	Adjustment for Older Youth Earnings Gain
Berkshire	\$36,452	- \$650	- \$1300	- \$450
Boston	\$73,632	None	None	None
Bristol County	\$36,764	- \$650	- \$1300	- \$450
Brockton	\$39,520	- \$325	- \$650	- \$225
Cape Cod and Islands	\$35,360	- \$650	- \$1300	- \$450
Central Mass	\$43,732	- \$325	- \$650	- \$225
Franklin/Hampshire	\$32,812	- \$650	- \$1300	- \$450
Greater Lowell	\$56,108	None	None	None
Greater New Bedford	\$34,996	- \$650	- \$1300	- \$450
Hampden County	\$38,272	- \$325	- \$650	- \$225
Lower Merrimack	\$47,112	None	None	None
Metro North	\$56,576	None	None	None
Metro South/West	\$63,128	None	None	None
North Central	\$36,556	- \$650	- \$1300	- \$450
North Shore	\$43,940	- \$325	- \$650	- \$225
South Coastal	\$44,148	- \$325	- \$650	- \$225
Statewide Average	\$52,832			

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FY2006 Participant Characteristics by Area

Area	Adult				Dislocated Worker			
	Less Than H.S.	Limited English	Dis-abled	Welfare	Less Than H.S.	Limited English	Dis-abled	Age 55 or Older
Berkshire	8%	0%	10%	60%	4%	0%	6%	17%
Boston	7%	23%	4%	20%	13%	20%	1%	14%
Bristol	15%	2%	6%	49%	29%	13%	2%	16%
Brockton	19%	7%	8%	25%	4%	1%	3%	21%
Cape & Islands	13%	1%	22%	47%	0%	0%	5%	33%
Central Mass	5%	4%	5%	54%	5%	0%	2%	17%
Franklin/Hampshire	16%	0%	14%	54%	5%	0%	4%	13%
Greater Lowell	10%	13%	4%	20%	16%	6%	3%	13%
Greater New Bedford	30%	10%	6%	49%	13%	8%	4%	22%
Hampden	20%	1%	8%	36%	11%	2%	4%	17%
Lower Merrimack	30%	15%	5%	55%	11%	8%	3%	12%
Metro North	14%	22%	2%	35%	1%	5%	2%	23%
Metro South/West	14%	8%	3%	76%	2%	3%	5%	28%
North Central	12%	2%	9%	28%	7%	1%	6%	18%
North Shore	10%	2%	5%	44%	11%	4%	4%	20%
South Coastal	24%	9%	19%	44%	5%	8%	2%	15%
Statewide Average	17%	9%	7%	42%	11%	6%	3%	19%
Area	Older Youth				Younger Youth			
	H.S. Drop Out	Preg/ Parent	Dis-abled	Basic Skills Defic	Welfare	Dis-abled	Limited English	Basic Skills Defic
Berkshire	63%	46%	33%	63%	37%	32%	0%	65%
Boston	37%	37%	2%	75%	18%	2%	0%	78%
Bristol	47%	22%	50%	58%	21%	47%	0%	75%
Brockton	38%	48%	33%	33%	20%	41%	0%	14%
Cape & Islands	59%	47%	24%	59%	9%	79%	0%	23%
Central Mass	69%	39%	17%	73%	14%	33%	0%	68%
Franklin/Hampshire	86%	29%	14%	43%	28%	9%	0%	7%
Greater Lowell	73%	49%	12%	88%	22%	22%	0%	93%
Greater New Bedford	61%	53%	19%	74%	29%	37%	0%	83%
Hampden	65%	4%	13%	70%	16%	24%	0%	74%
Lower Merrimack	49%	42%	11%	80%	19%	15%	0%	84%
Metro North	59%	23%	7%	77%	16%	26%	0%	80%
Metro South/West	33%	73%	20%	13%	12%	65%	0%	26%
North Central	48%	48%	0%	41%	30%	18%	0%	19%
North Shore	80%	0%	50%	70%	23%	41%	0%	83%
South Coastal	73%	14%	41%	11%	7%	77%	0%	5%
Statewide Average	55%	34%	17%	67%	19%	34%	0%	62%

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FY2007 Participant Characteristics by Area

Area	Adult				Dislocated Worker			
	Less Than H.S.	Limited English	Dis-abled	Welfare	Less Than H.S.	Limited English	Dis-abled	Age 55 or Older
Berkshire	12%	0%	10%	51%	4%	1%	3%	14%
Boston	6%	31%	4%	14%	12%	29%	2%	14%
Bristol	18%	3%	6%	43%	45%	31%	1%	20%
Brockton	19%	7%	8%	34%	10%	10%	4%	18%
Cape & Islands	11%	0%	17%	51%	0%	0%	5%	33%
Central Mass	8%	0%	6%	66%	9%	3%	3%	18%
Franklin/Hampshire	20%	5%	20%	41%	7%	2%	5%	19%
Greater Lowell	7%	8%	3%	18%	21%	13%	2%	19%
Greater New Bedford	29%	13%	7%	61%	19%	12%	4%	17%
Hampden	18%	7%	7%	36%	11%	8%	5%	18%
Lower Merrimack	29%	16%	4%	64%	16%	16%	3%	17%
Metro North	7%	16%	3%	40%	3%	8%	2%	20%
Metro South/West	15%	10%	7%	77%	2%	4%	4%	33%
North Central	11%	2%	0%	44%	9%	3%	5%	23%
North Shore	11%	6%	8%	47%	5%	5%	5%	18%
South Coastal	6%	8%	9%	38%	3%	8%	3%	22%
Statewide Average	16%	11%	6%	44%	15%	12%	3%	21%
Area	Older Youth				Younger Youth			
	H.S. Drop Out	Preg/ Parent	Dis-abled	Basic Skills Defic	Welfare	Dis-abled	Limited English	Basic Skills Defic
Berkshire	50%	44%	33%	44%	39%	29%	8%	27%
Boston	38%	34%	1%	78%	18%	1%	17%	73%
Bristol	67%	47%	22%	73%	21%	46%	12%	77%
Brockton	50%	27%	20%	20%	9%	38%	23%	5%
Cape & Islands	88%	53%	12%	71%	21%	67%	22%	31%
Central Mass	80%	33%	22%	59%	12%	39%	0%	61%
Franklin/Hampshire	75%	13%	13%	38%	24%	8%	11%	6%
Greater Lowell	68%	32%	14%	73%	18%	36%	16%	75%
Greater New Bedford	62%	62%	19%	78%	28%	40%	13%	77%
Hampden	66%	14%	11%	78%	13%	22%	1%	72%
Lower Merrimack	41%	50%	7%	73%	19%	17%	8%	79%
Metro North	66%	34%	7%	78%	17%	23%	9%	73%
Metro South/West	26%	78%	9%	17%	16%	73%	7%	33%
North Central	68%	40%	8%	12%	15%	29%	30%	16%
North Shore	85%	20%	25%	65%	22%	29%	26%	69%
South Coastal	56%	19%	37%	3%	7%	71%	18%	3%
Statewide Average	57%	38%	14%	62%	18%	34%	12%	56%

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FY09 Adjustments Available Based on FY2006 or FY2007 Participant Characteristics by Area*

Area	Adult				Dislocated Worker			
	Less Than H.S.	Limited English	Dis-abled	Welfare	Less Than H.S.	Limited English	Dis-abled	Age 55 or Older
Berkshire	-	-	-	-2	-	-	-1	-
Boston	-	-2	-		-1	-2	-	-
Bristol	-1	-	-	-1	-2	-1	-	-
Brockton	-1	-	-	-	-	-1	-	-
Cape & Islands	-	-	-2	-1	-	-	-	-2
Central Mass	-	-	-	-2	-	-	-	-
Franklin/Hampshire	-1	-	-2	-1	-	-	-	-
Greater Lowell	-	-1	-	-	-2	-2	-	-
Greater New Bedford	-2	-1	-	-2	-2	-2	-	-
Hampden	-1	-	-	-	-	-	-	-
Lower Merrimack	-2	-1	-	-2	-1	-2	-	-
Metro North	-	-1	-	-	-	-	-	-
Metro South/West	-	-	-	-2	-	-	-	-2
North Central	-	-	-	-1	-	-	-1	-
North Shore	-	-	-	-1	-	-	-	-
South Coastal	-1	-	-1	-2	-	-	-	-
Area	Older Youth				Younger Youth			
	H.S. Drop Out	Preg/ Parent	Dis-abled	Basic Skills Defic	Welfare	Dis-abled	Limited English	Basic Skills Defic
Berkshire	-1	-2	-2	-1	-2	-2	-	-1
Boston	-	-1	-	-2	-	-	-1	-2
Bristol	-1	-2	-2	-2	-1	-2	-	-2
Brockton	-	-	-2	-	-1	-1	-2	-
Cape & Islands	-2	-2	-2	-2	-1	-2	-2	-
Central Mass	-2	-1	-2	-2	-	-1	-	-1
Franklin/Hampshire	-2	-	-	-	-1	-	-	-
Greater Lowell	-2	-2	-	-2	-	-1	-1	-2
Greater New Bedford	-1	-2	-1	-2	-1	-2	-	-2
Hampden	-1	-	-	-2	-	-	-	-2
Lower Merrimack	-	-2	-	-2	-	-	-	-2
Metro North	-1	-	-	-2	-	-	-	-2
Metro South/West	-	-2	-	-	-	-2	-	-
North Central	-1	-2	-	-	-	-	-2	-
North Shore	-2	-	-2	-1	-1	-2	-2	-2
South Coastal	-2	-2	-2	-	-	-2	-1	-1

Since many of the participant and exit cohorts that will be included in FY2009 annual performance outcomes may have been served in prior fiscal years, adjustments are based on the highest percent served in FY2006 or FY2007. Percent served in FY2008 will be considered in adjustments to FY2010 performance goals.