

EASTERN WORKFORCE INVESTMENT BOARD, INC.



TWO - YEAR MODIFIED STRATEGIC PLAN

July 1, 2007 through June 30, 2009

“The Eastern WIB – creating opportunities to develop a world class workforce.”

*EWIB is an Equal Opportunity Employer/Program
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SECTION I: LOCAL WORKFORCE INVESTMENT AREA PROFILE

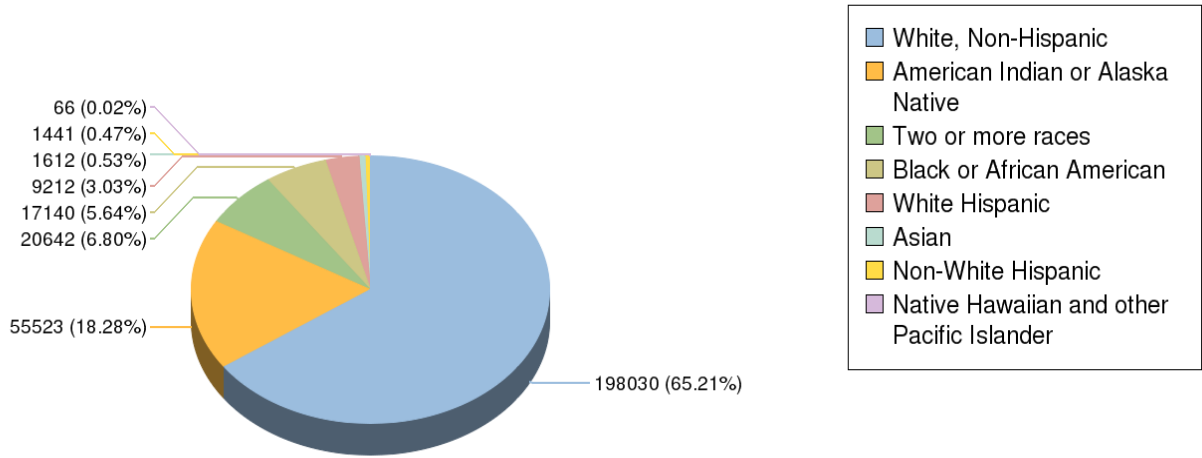
- *Total Population (all ages)*
- *Population of labor force age 15-64*
- *Population age 15-24 (Emerging labor force)*
- *Population age 0-14 (Children)*

The Eastern Workforce Investment Area is comprised of seven counties: Adair, Cherokee, McIntosh, Muskogee, Okmulgee, Sequoyah, and Wagoner counties. The total population of the Eastern Workforce Investment area is 303,666.

Tables A, B, and C and on the following pages gives detailed information of the Eastern Workforce Investment Area regarding 2007 population by race/ethnicity, 2007 – 2012 percent population change by race ethnicity and 2007-2012 population change by age.

TABLE A: EASTERN WORKFORCE INVESTMENT AREA POPULATION BY RACE/ETHNICITY

2007 Population by Race/Ethnicity



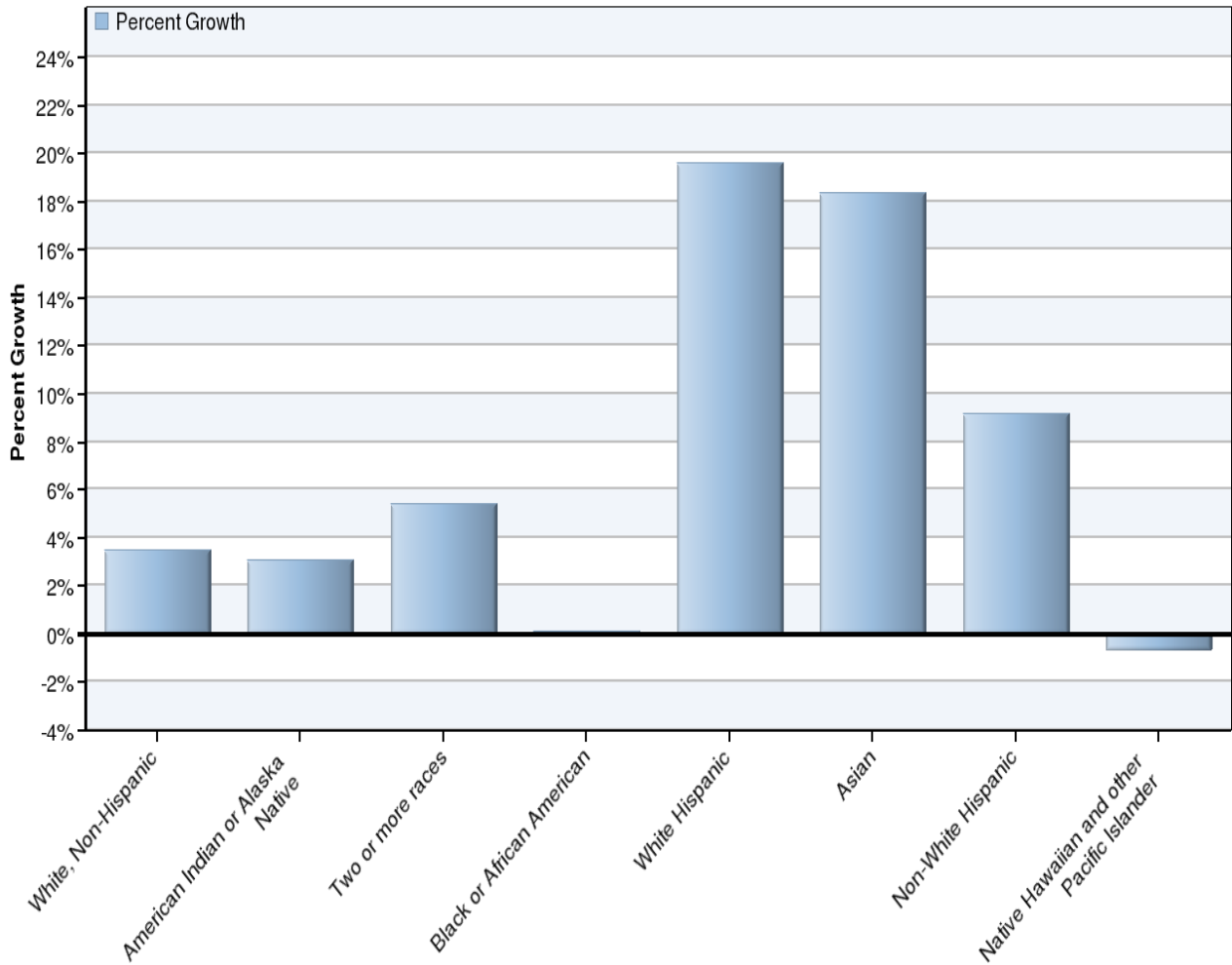
Source: Economic Modeling Specialists, 2007

Ethnicity	2007 Population	% of Region
White, Non-Hispanic	198,030	65.21%
American Indian or Alaska Native	55,523	18.28%
Two or more races	20,642	6.8%
Black or African American	17,140	5.64%
White Hispanic	9,212	3.03%
Asian	1,612	0.53%
Non-White Hispanic	1,441	0.47%
Native Hawaiian and other Pacific Islander	66	0.02%

Source: Economic Modeling Specialists, Inc. - 9/07

TABLE B: EASTERN WORKFORCE INVESTMENT AREA PERCENT POPULATION CHANGE BY RACE/ETHNICITY

2007-2012 Percent Population Change by Race/Ethnicity



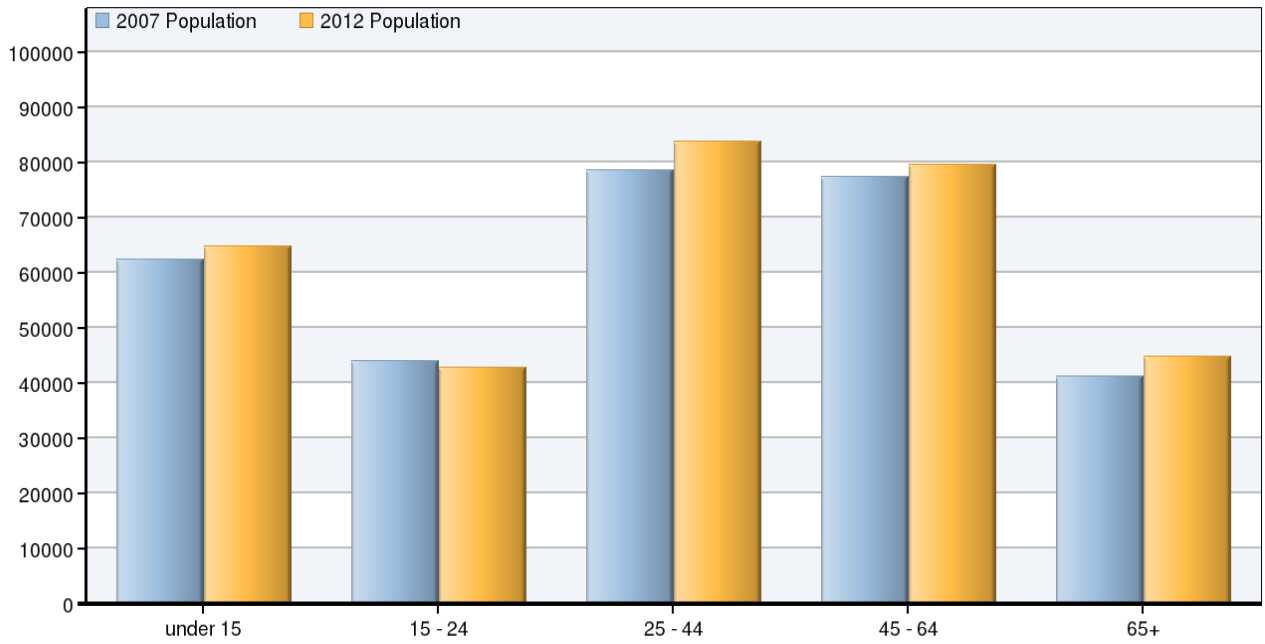
Source: Economic Modeling Specialists, 2007

Race/Ethnicity	2007 Population	2012 Population	Change	% Change
White, Non-Hispanic	198,030	204,876	6,846	3%
American Indian or Alaska Native	55,523	57,227	1,704	3%
Two or more races	20,642	21,754	1,112	5%
Black or African American	17,140	17,155	15	0%
White Hispanic	9,212	11,016	1,804	20%
Asian	1,612	1,908	296	18%
Non-White Hispanic	1,441	1,573	132	9%
Native Hawaiian and other Pacific Islander	66	65	0	-1%

Source: Economic Modeling Specialists, Inc. - 9/07

TABLE C: EASTERN WORKFORCE INVESTMENT AREA POPULATION CHANGE BY AGE

2007-2012 Population Change by Age



Source: Economic Modeling Specialists, 2007

Age	2007 Population	2012 Population	Change	% Change
under 15	62,345	64,836	2,490	4%
15 - 24	43,919	42,717	-1,202	-3%
25 - 44	78,627	83,721	5,095	6%
45 - 64	77,484	79,593	2,108	3%
65+	41,290	44,707	3,416	8%

Source: Economic Modeling Specialists, Inc. - 9/07

EWIB identified several challenges that have emerged as a result of the changing demographics including a:

- Declining income for the population within the area,
- Shrinking middle class -- increasing lower and upper classes,
- Aging population/ workforce, and
- Increase in diversity/ minority population.
- Social Issues-drug problem

The EWIB is interested in growing the wealth of the Eastern workforce investment area. This will address the declining income issue, as well as begin to increase the lower, middle and upper class. With an aging population, some industries may find themselves in a shortage of workers as the baby boomers retire and the emerging workforce and children do not meet the need in numbers or skill levels. The increase in the minority population may ease the impact, as long as the minorities possess the skills required for the jobs. With potential language barriers, or cultural differences, the employers may need assistance with adjusting to a diverse labor force. The EWIB will be ready to assist with services to meet the needs of both employers and job seekers. The EWIB will also host seminars to address drug issues within the workforce area.

The Eastern Workforce Investment Area has five full-service workforce centers. These service centers provide the full range of core services, as well as access to one stop partner’s programs. The centers, their locations and the labor market areas they represent are listed in the table below.

TABLE D: EASTERN WORKFORCE INVESTMENT AREA FULL SERVICE WORKFORCE CENTERS AND LOCATIONS
(www.easternwib.com)

CENTER	LOCATION/COUNTY	AREA SERVED
Muskogee County	717 S. 32 nd St. Muskogee, OK	LMA 22
Okmulgee County – Housed with Oklahoma State University – Okmulgee Technical Branch	1801 East 4 th St. Okmulgee, OK	LMA 18
Cherokee County	1755 S. Muskogee Tahlequah, OK	LMA 24
Sequoyah County —Housed with the Cherokee Nation	1502 West Chickasaw Sallisaw, OK	LMA 24
Adair County —Housed with the Cherokee Nation	219 West Oak Stilwell, OK	LMA 24

The Eastern One Stop Delivery System also includes two “satellite” centers. They are located in Checotah, (McIntosh County), and Wagoner, (Wagoner County).

The Eastern WIB’s system oversight committee is currently evaluating other access points to the system. EWIB plans to create access points in libraries, partner agencies, and faith-based and community organizations.

When the initial One Stops were configured, the state mandated a One Stop be placed within the lead city of each local labor market. In addition, the local elected officials were eager to have an office in each county to ensure ease of access for customers.

In the past five years, the Eastern WIB has increased the number of customers served and maintained quality of service in the One-Stop Centers and satellite offices. It has not compromised the customers because of formula funding budget cuts. Part of the reason the EWIB has been successful in the financial management of programs is because of its philosophy to maximize the flexibility of various funding streams, careful financial planning, and, effective internal controls. EWIB also applies for funding as it has becomes available in order to serve specialty populations such as National Emergency Grants for dislocated workers of trade impacted companies and the Hurricane Katrina evacuees.

At this time, the Board intends to continue serving as many individuals who need WIA services as possible within its funding constraints. Core services will continue to be provided to all individuals, with intensive and training services provided on an as needed basis dependent on the needs of the customer to obtain or retain employment

All affiliate relationships with existing public providers that the Board has developed are reflected within the memorandums of agreement.

SECTION II. LOCAL AREA STRATEGIC PLANNING PROCESS

ECONOMIC ENVIRONMENT AND KEY WORKFORCE ISSUES

The Oklahoma Department of Commerce Research and Economic Analysis Division identified the following as key industry clusters for the Eastern Workforce Investment Area:

- Trade
- Local Health Care Services
- Education
- Manufacturing
- Government
- Construction
- Agriculture and Food Processing
- Administrative & Support Services
- Hospitality, Recreation and Tourism
- Finance & Insurance

Although Trade has the most jobs within the area, it is not considered a “wealth generating” industry within the local community. Therefore, the remaining nine are key industry clusters that will be explored more fully. **Health Care Services** was the cluster with the highest employment (after Trade) within the Eastern workforce area. The three largest sub-clusters within the Eastern area are general medical and surgical hospitals, followed by nursing care facilities and home health care services.

TABLE E: EASTERN WORKFORCE INVESTMENT AREA 2006 REGIONAL CLUSTER ANALYSIS
(Source: Oklahoma Department of Commerce)

2005 Rank	Industry	2005 # of Establishments	% Change from 2004	2005 # of Employees	% Change from 2004	2005 Average Wage	% Change from 2004
1	Trade	1,006	-15%	12,303	3%	\$19,011	4%
2	Local Healthcare Services	482	-7%	11,518	1%	\$27,120	20%
3	Education	89	3%	10,041	2%	\$25,916	7%
4	Manufacturing	278	-6%	9,918	9%	\$35,507	-1%
5	Government	332	11%	8,155	4%	\$32,695	17%
6	Construction	470	4%	3,082	5%	\$25,951	8%
7	Agriculture & Food Processing	76	-14%	3,069	29%	\$27,473	12%
8	Administrative & Support Services	226	5%	3,040	42%	\$16,278	8%
9	Hospitality, Tourism & Recreation	137	-4%	2,568	38%	\$19,818	9%
10	Finance & Insurance	348	1%	2,114	1%	\$27,799	-20%

The Eastern Workforce Investment Board (EWIB) took a proactive approach in the role as a convener for workforce and economic development in October 2006. To meet the demand for skilled healthcare professionals in the Eastern Oklahoma area, EWIB convened the **Eastern Region Healthcare Coalition** to assess the region's current healthcare providers' needs, plan for future needs, and to develop a pipeline to fulfill area needs. By bringing together all facets of employment, education and economics (E³), the Coalition plans to create a long-term workforce solution for the critical shortage in our region using the same approach as the President's High Growth Initiative. The Coalition is in the process of developing a solutions-based strategic plan using partner resources in their area of strength.

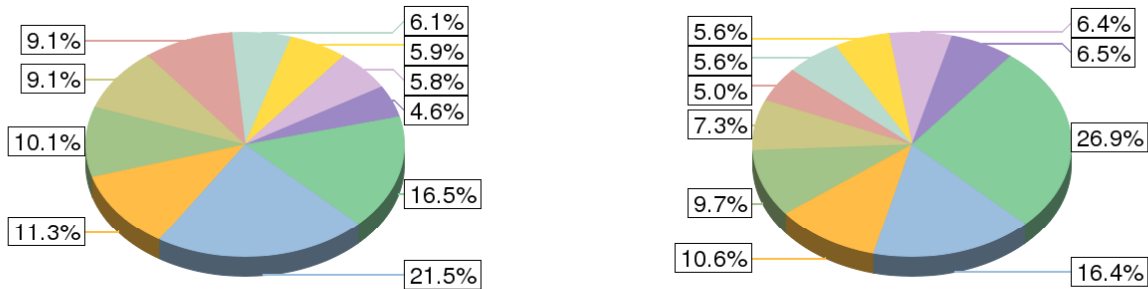
Tables F, G, H and I on the following pages give an overview of the Eastern Workforce Investment Area regarding industry and occupational super sectors.

TABLE F: EASTERN WORKFORCE INVESTMENT AREA 2007 INDUSTRY SUPERSECTORS

2007 Industry Supersectors

2007 Regional Jobs

2007 State Jobs



- Government
- Health care and social assistance
- Agriculture, forestry, fishing and hunting
- Construction
- Administrative and waste services
- Retail trade
- Manufacturing
- Other services, except public administration
- Accommodation and food services
- Other

Source: Economic Modeling Specialists, 2007

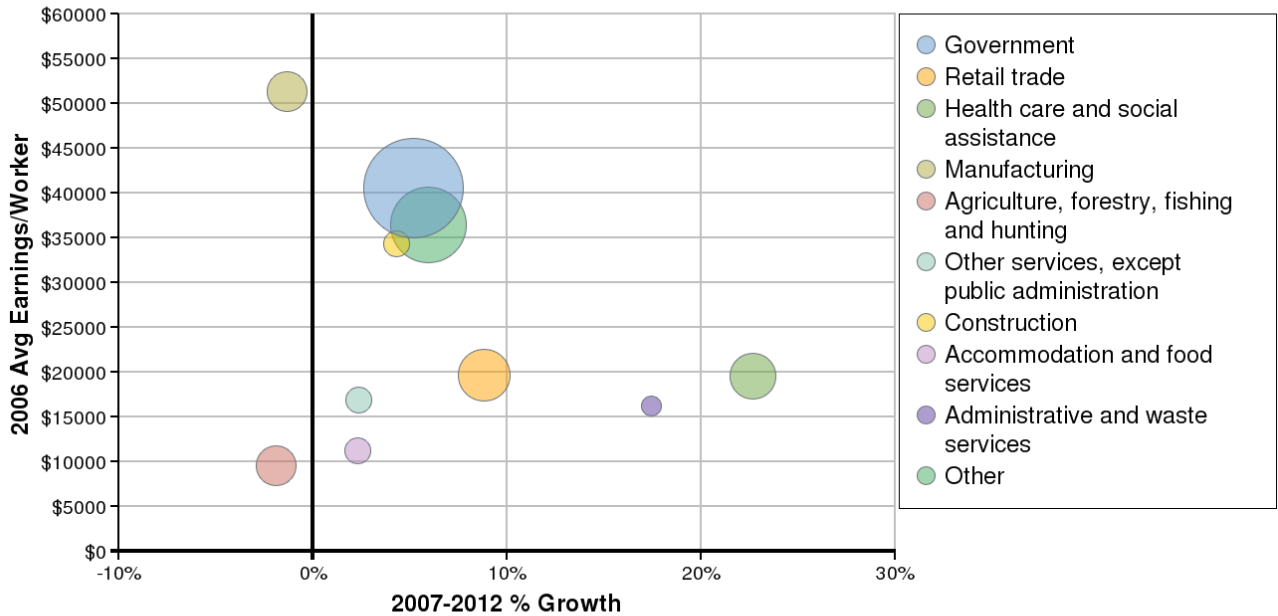
Description	2007 Regional Jobs	% Regional Jobs	2007 State Jobs	% State Jobs
Agriculture, forestry, fishing and hunting	11,347	9.1%	106,295	5%
Mining	1,015	0.8%	64,890	3%
Utilities	647	0.5%	10,984	0.5%
Construction	7,347	5.9%	120,024	5.6%
Manufacturing	11,350	9.1%	154,977	7.3%
Wholesale trade	2,377	1.9%	64,995	3.1%
Retail trade	14,135	11.3%	226,515	10.6%
Transportation and warehousing	3,367	2.7%	69,325	3.3%
Information	834	0.7%	35,931	1.7%
Finance and insurance	3,237	2.6%	80,962	3.8%
Real estate and rental and leasing	2,946	2.4%	69,800	3.3%
Professional and technical services	3,377	2.7%	106,751	5%
Management of companies and enterprises	218	0.2%	13,687	0.6%
Administrative and waste services	5,723	4.6%	139,055	6.5%

Educational services	883	0.7%	25,898	1.2%
Health care and social assistance	12,536	10.1%	206,296	9.7%
Arts, entertainment, and recreation	1,647	1.3%	29,400	1.4%
Accommodation and food services	7,253	5.8%	136,521	6.4%
Other services, except public administration	7,544	6.1%	118,486	5.6%
Government	26,763	21.5%	348,259	16.4%

Source: Economic Modeling Specialists, Inc. - 9/07

TABLE G: EASTERN WORKFORCE INVESTMENT AREA 2007-2012 INDUSTRY SUPERSECTORS

2007-2012 Industry Supersectors



*Bubble size represents 2007 jobs in each supersector.

Source: Economic Modeling Specialists, 2007

Description	2007 Jobs	2012 Jobs	Growth	% Growth	2006 EPW
Agriculture, forestry, fishing and hunting	11,347	11,134	-213	-2%	\$9,284
Mining	1,015	950	-65	-6%	\$67,007
Utilities	647	676	29	4%	\$82,376
Construction	7,347	7,664	317	4%	\$36,506
Manufacturing	11,350	11,201	-149	-1%	\$50,813
Wholesale trade	2,377	2,468	91	4%	\$36,652
Retail trade	14,135	15,381	1,247	9%	\$22,113
Transportation and warehousing	3,367	3,169	-198	-6%	\$41,435
Information	834	889	55	7%	\$49,157
Finance and insurance	3,237	3,337	100	3%	\$47,718
Real estate and rental and leasing	2,946	3,492	546	19%	\$32,772
Professional and technical services	3,377	3,699	322	10%	\$29,478
Management of companies and enterprises	218	174	-44	-20%	\$51,247
Administrative and waste services	5,723	6,719	997	17%	\$20,004
Educational services	883	1,066	183	21%	\$18,437
Health care and social assistance	12,536	15,379	2,844	23%	\$25,651
Arts, entertainment, and recreation	1,647	1,853	206	13%	\$23,243

Accommodation and food services	7,253	7,419	166	2%	\$11,572
Other services, except public administration	7,544	7,723	179	2%	\$17,414
Government	26,763	28,149	1,386	5%	\$43,379

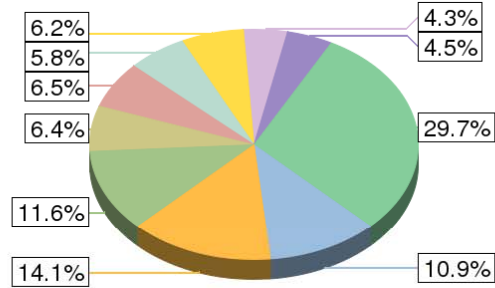
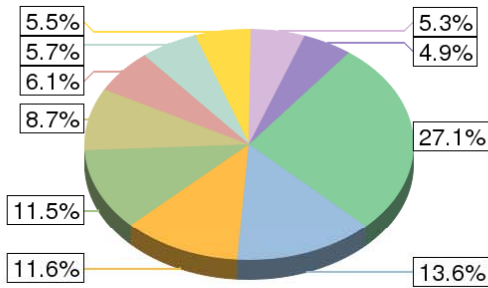
- Source: Economic Modeling Specialists, Inc. - 9/07

TABLE H: EASTERN WORKFORCE INVESTMENT AREA 2007 OCCUPATIONAL SUPERSECTORS

2007 Occupational Supersectors

2007 Regional Jobs

2007 State Jobs



- Management occupations
- Sales and related occupations
- Food preparation and serving related occupations
- Transportation and material moving occupations
- Healthcare practitioners and technical occupations
- Office and administrative support occupations
- Production occupations
- Construction and extraction occupations
- Education, training, and library occupations
- Other

Source: Economic Modeling Specialists, 2007

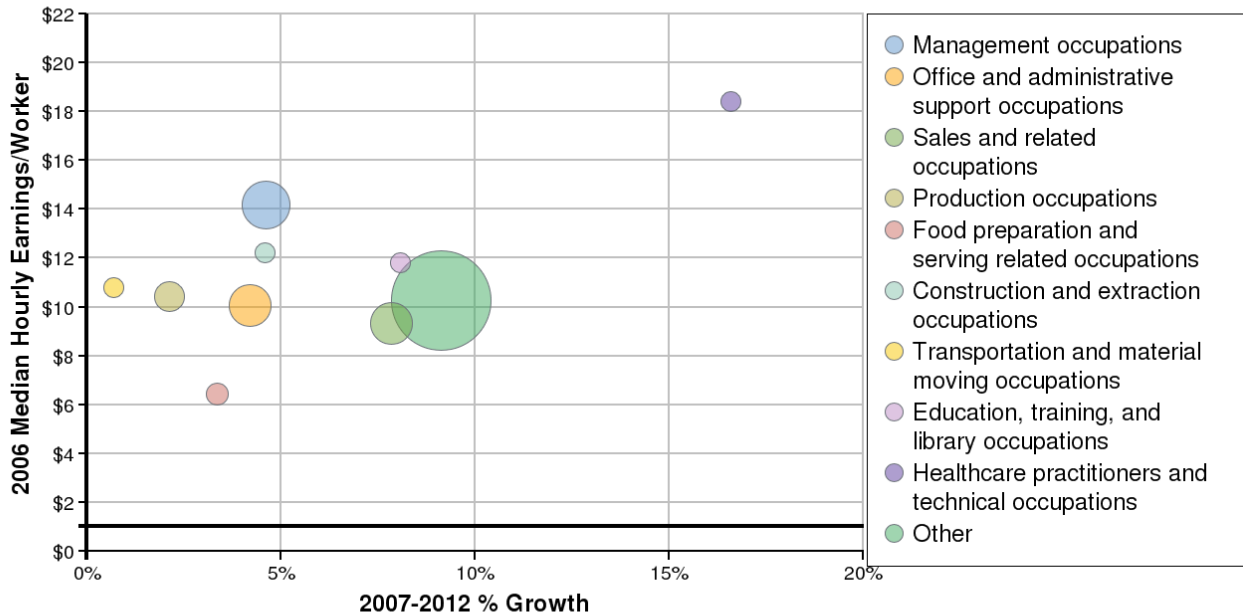
SOC Code	Description	2007 Regional Jobs	% Regional Jobs	2007 State Jobs	% State Jobs
11-0000	Management occupations	16,956	13.6%	232,096	10.9%
13-0000	Business and financial operations occupations	3,975	3.2%	89,040	4.2%
15-0000	Computer and mathematical science occupations	1,071	0.9%	33,276	1.6%
17-0000	Architecture and engineering occupations	1,049	0.8%	28,687	1.3%
19-0000	Life, physical, and social science occupations	1,003	0.8%	20,914	1%
21-0000	Community and social services occupations	1,954	1.6%	23,221	1.1%
23-0000	Legal occupations	566	0.5%	16,451	0.8%
25-0000	Education, training, and library occupations	6,625	5.3%	92,226	4.3%
27-0000	Arts, design, entertainment, sports, and media occupations	2,210	1.8%	43,142	2%
29-0000	Healthcare practitioners and technical occupations	6,080	4.9%	96,181	4.5%
31-0000	Healthcare support occupations	4,043	3.2%	51,689	2.4%
33-0000	Protective service occupations	1,970	1.6%	37,051	1.7%
35-0000	Food preparation and serving related occupations	7,598	6.1%	138,576	6.5%
37-0000	Building and grounds cleaning and maintenance occupations	4,317	3.5%	81,808	3.8%

39-0000	Personal care and service occupations	5,043	4%	79,652	3.7%
41-0000	Sales and related occupations	14,303	11.5%	247,092	11.6%
43-0000	Office and administrative support occupations	14,433	11.6%	299,490	14.1%
45-0000	Farming, fishing, and forestry occupations	412	0.3%	5,969	0.3%
47-0000	Construction and extraction occupations	7,073	5.7%	124,238	5.8%
49-0000	Installation, maintenance, and repair occupations	4,859	3.9%	85,421	4%
51-0000	Production occupations	10,825	8.7%	135,373	6.4%
53-0000	Transportation and material moving occupations	6,907	5.5%	131,600	6.2%
55-0000	Military Occupations	1,274	1%	35,821	1.7%

Source: Economic Modeling Specialists, Inc. - 9/07

TABLE I: EASTERN WORKFORCE INVESTMENT AREA 2007-2012 OCCUPATIONAL SUPERSECTORS

2007-2012 Occupational Supersectors



*Bubble size represents 2007 jobs in each supersector.

Source: Economic Modeling Specialists, 2007

SOC Code	Description	2007 Jobs	2012 Jobs	Growth	% Growth	2006 EPW
11-0000	Management occupations	16,956	17,738	782	5%	\$15.04
13-0000	Business and financial operations occupations	3,975	4,284	309	8%	\$16.89
15-0000	Computer and mathematical science occupations	1,071	1,220	149	14%	\$21.02
17-0000	Architecture and engineering occupations	1,049	1,099	50	5%	\$23.98
19-0000	Life, physical, and social science occupations	1,003	1,086	84	8%	\$20.01
21-0000	Community and social services occupations	1,954	2,236	281	14%	\$13.14
23-0000	Legal occupations	566	639	73	13%	\$25.33
25-0000	Education, training, and library occupations	6,625	7,159	534	8%	\$13.08
27-0000	Arts, design, entertainment, sports, and media occupations	2,210	2,397	187	8%	\$12.24
29-0000	Healthcare practitioners and technical occupations	6,080	7,089	1,009	17%	\$22.50
31-0000	Healthcare support occupations	4,043	4,937	894	22%	\$9.03
33-0000	Protective service occupations	1,970	2,098	128	6%	\$12.73
35-0000	Food preparation and serving related occupations	7,598	7,854	256	3%	\$6.74
37-0000	Building and grounds cleaning and maintenance occupations	4,317	4,659	341	8%	\$7.50

39-0000	Personal care and service occupations	5,043	5,517	475	9%	\$7.16
41-0000	Sales and related occupations	14,303	15,427	1,124	8%	\$10.36
43-0000	Office and administrative support occupations	14,433	15,041	608	4%	\$10.67
45-0000	Farming, fishing, and forestry occupations	412	394	-17	-4%	\$8.51
47-0000	Construction and extraction occupations	7,073	7,398	325	5%	\$12.99
49-0000	Installation, maintenance, and repair occupations	4,859	5,056	197	4%	\$13.93
51-0000	Production occupations	10,825	11,056	230	2%	\$10.76
53-0000	Transportation and material moving occupations	6,907	6,956	48	1%	\$10.87
55-0000	Military Occupations	1,274	1,202	-72	-6%	\$15.56

- Source: Economic Modeling Specialists, Inc. – 9-07

The EWIB utilized anecdotal data gathered from community leaders at the EWIB strategic planning session to begin its conversation about employment trends and projections. In addition, the Oklahoma Department of Commerce Research and Economic Analysis Division’s Regional Employment Analysis along with data from the Economic Modeling Specialists, Inc. (EMSI) were reviewed during the strategic planning and substantiate the initial anecdotal information.

EWIB will only target industries from within the key industry clusters. To determine which industries will be targeted, they will gather information from businesses within the ten industry clusters to identify where the greatest skills gaps exist between the skills required by the businesses and the skills possessed by the current and future labor force. The industries to be targeted will be those industries that have the largest skills gap, have wages higher than the region’s average, and have the greatest potential for growth. The Business Services Team will help gather the data from which the Board will be able to discuss and choose the Targeted Industries.

Once the EWIB has selected the targeted industries, the Business Services Team will conduct focus groups and distribute surveys to gather the required job skills and skill levels to succeed both currently and in the future in those employment opportunities. The focus groups/surveys will also identify which of the skills the employers are currently having the most trouble finding within the labor force, and those the employers expect will be hard to find in the future. This data will be analyzed to determine how to change the services delivered through the workforce development system help to shape appropriate services.

Once the EWIB has gathered the skill requirements from the employers and has determined the skills gaps for those targeted industries, the EWIB will begin to develop services that will assist each jobseeker to gain the skills required to work within the targeted industries.

The EWIB along with economic development organizations, chambers of commerce, Cherokee and Creek Nations, city government and others are participating in a regional labor study. This joint effort will provide a variety of statistics and analysis about our workforce including:

- Profile of local labor force;
- Numbers of the underemployed;
- Commuting patterns;
- Willingness to change employers;
- Educational levels of Eastern Oklahoma's labor pool.

During the strategic planning, the EWIB identified one of their critical issues to be addressed is the lack of a **regional** workforce and economic development process. They decided it was important to become the lead for workforce and economic development in small communities within the area. The Eastern Workforce Investment Board (EWIB) received Workforce Investment Act funds targeting regionalism. One of the key components of this initiative was the formation of a Regional Economic Development Council (REDC), consisting of 20 regional community leaders. The REDC is charged with designing a strategic plan for building a regional economic and workforce development alliance.

To attract key stakeholders in the region and gather input on the direction of the REDC's strategic plan, the EWIB hosted a regional economic and workforce development summit on March 8 and 9, 2007. Workforce and economic development professionals, government leaders, businesses and education convened to hear from subject matter experts about trends, issues, and potential models for regionalism.

The EWIB has used a variety of approaches to identify trends, emerging issues, and available assets including utilizing a Business Services Team, researching various publications, connecting with local economic development initiatives, through the work of each WIB member, hosting Town Hall meetings and, conducting WIB strategic planning.

Business Services Team activities: The EWIB chartered a Business Services Team comprised of individuals from partner agencies that represent their outreach to the business community. The role of the Business Services Team is to gather data from businesses in order to anticipate the business needs. The members of the team work collectively to address needs as they are identified. The Business Services Team will also serve as staff to the Regional Economic Development Council (REDC).

The Business Service Team set the mission as “meet the economic and workforce needs and promote the continued prosperity of the regional community”. The membership set one major goal; establishing themselves as the “Go-To Place” utilizing a strong referral system to strengthen the delivery of services and products. To meet this goal their first objective was the introduction of an educational component at each of their regular meetings. This allows cross-training and a firm understanding of each partner's role and expertise. They have continued with additional objectives that provides training to the business community. To accomplish this they have developed and distributed publications and posters, conducted workshops and developed specialized solutions as needs arose. Many of these efforts (as well as publications) have been replicated across the state and are in use through other business services teams.

This on-going process has been established through regular team meetings and specific sub-committees to complete specific tasks. Examples of these committees are the Hiring Guidelines Committee, Business Services Directory Committee, Marketing and Outreach Committee, and

Needs Assessment Committee. Focus groups utilized by these committees continue to be an excellent source of gathering information, assessing needs and demonstrating outreach to business.

Researching Various Publications: The EWIB is reviewing data compiled by the OESC labor market analysis division, the Oklahoma Department of Commerce's research division publications, and, the examination of regional demographic data. EWIB staff also researches current economic issues and national trends through use of such publications as *Business 2.0*, *Newsweek*, *Time*, *Business Week*, *HR Magazine*, *Workforce Management*, and ODOC's *Community Developer*. Additionally, the Internet provides excellent and immediate resources. Such websites as www.hudson.org, www.imagishift.com, www.okcommerce.gov, www.leadered.com, www.shrm.org, www.bea.doc.gov, www.uschamber.com, economicmodeling.com, and www.npr.org are reviewed regularly.

Connecting with Economic Development Initiatives: In addition, the Business Services Team and EWIB staff are connecting with the local economic development initiatives, the local elected officials, rural economic development specialists, manufacturing alliance staff, DOC Community Dev. Staff, and, local businesses and business groups. This is done through the Business Services Representatives and the EWIB staff attending community meetings as well as specific meetings called by the various groups, and, by the Business Services Team providing workshops and information sessions for the various leaders within the community.

WIB Member Activities: The third method the EWIB uses to identify trends, emerging issues and available assets is through the participation of the EWIB members. Each member represents a connection to a valuable segment (geographic, cultural and business segment) of the local communities within the region. As the members discuss various agenda items at the local Board and subcommittee meetings, the trends and emerging issues are brought forth to and shared with the full EWIB.

Conducting WIB Strategic Planning: The EWIB held a strategic planning process in September, 2007. The EWIB reviewed:

- the expanded role/responsibilities of the EWIB based on federal legislation and state expectations, especially in the areas of integration and the reduction in force of state employees.
- EWIB past accomplishments,
- EWIB projected accomplishments,
- Governor's Council's strategic plan,
- State WIA/Wagner-Peyser compliance plan
- Workforce Center Integration
- Local area trends, changes, and urgent issues
- Workforce Development industry projected changes in

- Technology
- Suppliers
- Customer needs
- Government regulations
- Economy
- EWIB strengths, weaknesses, opportunities and threats
- Critical issues for the region
- Goals/objectives and strategies to address the critical issues
- EWIB governance/committee structure required to meet the goals
- Plan to communicate the strategic planning session results

Use of WorkKeys in the local One-Stop Career Centers has provided a big insight into the skills of the existing workforce. An analysis of these results and cooperative efforts with specific employer's staffing needs has indicated a serious deficiency in the basic skill levels of current workers. This is continually reinforced during site visits with employers. Information learned in these employer focus groups and site visits have led to dedicated workforce center space for full-time classroom enrichment and partnering with adult education. This training extends beyond just basic education components and encompasses soft skill training to provide a work readiness approach.

On-going collaboration efforts between education institutions and the One Stops also focus on advanced training components of the maintenance and mechanical needs identified by regional employers. Other areas of business need identification examine skills that cross industry boundaries such as customer service. In each endeavor the WIB has been instrumental in bringing existing resources together to better serve the workforce needs of the region. WIB committees are instrumental in providing guidance for collaboration and cohesion with other entities with each endeavor poised to support the overall WIB strategies defined by the board membership. Future efforts are focused on strengthening the relationship with K-12 educational institutions and intervention approaches.

EWIB is currently working on a project that contains an approach to avert facility closure by aligning workforce development and educational entities along with employers to take proactive steps to determine through assessment what the regional workforce skill levels currently are, what skill levels are needed to remain industrially competitive and how to address skill level gaps before facility closure becomes a consideration.

The project is an innovative approach to measuring incumbent worker skill gaps by using Work Keys assessment tools on-site at the facility so employers can maintain productivity while their employees are being assessed. EWIB will share the skill gap reports with regional educational institutions in order to encourage a review in curriculum that will result in business-driven changes. Creating a pipeline of certified workers that address the skills sets needed by

manufacturing, regional economic development entities will be able to recruit manufacturers and retain existing industries to the region because of the existing skilled workforce.

The key critical issues the EWIB identified in its planning session are:

- There is a lack of accountability for and integration within the One Stops
- We do not understand the education system from start to end
- There is a lack of regional economic development process
- There is a lack of community understanding of the workforce development system
- There is a potential mismatch between the skills required for jobs and the skills of the labor force
- There is a drug problem within the area which is tied to poverty and the lack of hope

The EWIB identified the following information gaps that, once they collect and analyze, will enable the EWIB to serve both the job seeker and business customer more fully--current and accurate data on:

- Demand Side--Skills required by business
- Supply Side Skills held by labor force
 - Skills gaps between what is required by business and what labor force has and can demonstrate
 - Drop-out rates
 - Actual placements in fields of study
 - Career Pathways
 - Career Ladders
 - How global competitiveness impacts us
 - How the potential change in state and federal leadership will impact programs and funding
 - Impact of any change in legislation and legislators
 - What skills can differentiate our workforce from other nations

ENGAGING COMMUNITY PARTNERS IN WORKFORCE SOLUTIONS

EWIB has identified the need to increase common education representation on the Board and in joint partnership activities. EWIB is concerned about what is perceived as a lack of assistance to the non-college bound during their elementary and high school years. As the growing number of jobs for the future will require two year technical certificates and not four year degrees, it is important for students who are interested in technical training to be assisted while in high school to adequately prepare for that training.

Additionally, the EWIB is concerned about the number of students who do not graduate from high school. Without the skills learned during the high school years, these individuals will be unable to find jobs at self-sufficient wages, and the local employers will not be able to fill job vacancies.

By adding key common education representatives on the Board, EWIB will be able to begin to coordinate education and workforce development activities in order to create a labor pool of educated job applicants skilled to meet the requirements of today's and tomorrow's jobs. Through this partnership, EWIB hopes to embed the 7 WorkKeys "work-ready" blocks into K-12, thus ensuring tomorrow's workforce is prepared.

The Business Services Team, on the request of the EWIB is currently gathering, through focus groups and surveys, the business community needs. The information gathered from these processes will be used to adjust services to both job seekers and businesses.

In program year 2001, the EWIB brought partners together to conduct community audits and create a service matrix to better serve our customers. The EWIB developed memorandums of understanding that added value to each of the partners and EWIB services. The partners learned they could work as a team, not as single entities, to provide quality services without duplication that has enabled EWIB to serve more customers as its WIA Title I formula funding decreased.

The EWIB conducted employer focus groups to determine the information to be included within a business survey. From the results, the EWIB created a baseline of customer satisfaction for business services. It then began identifying the needs of the business community so that it could become more responsive to it. The EWIB worked to secure funding in order to better serve its business sector customers. The Board also expanded its field of vision to include economic development and educational partners as it continued to build a workforce development system. The EWIB leveraged those partner resources to continue to provide services that evolve and grow with community needs. In 2003, the EWIB began building relationships with faith based and community organizations in response the President Bush's initiative. Those relationships have increased the array of referral services the EWIB utilizes to better serve customers.

The System Oversight Committee is continuing to review all services currently provided and which partners provide those services. They also are identifying potential players not yet involved that could enhance the services to job seekers and employers if they became a part of the local workforce development system. The Committee is also reviewing any partners who have reduced their former involvement, in order to re-engage them to create a more comprehensive, integrated workforce development system.

The EWIB developed goals, objectives and strategies to address the key critical issues they discovered during the planning session. Table J on the next page represents EWIB's strategic planning goals, objectives, strategies and measurements.

TABLE J: EASTERN WORKFORCE INVESTMENT BOARD CRITICAL ISSUES, GOALS, OBJECTIVES, STRATEGIES AND MEASUREMENTS

(Eastern Workforce Investment Board Strategic Planning Session December 2005)

Critical Issue	Goal	Objective	Strategy	Who is Responsible
There is a lack of funding for workforce development within the region	Increase funds for the WIB/system	During 2006, EWIB will increase fee for service funds by \$50,000	<ul style="list-style-type: none"> • Sponsor seminars where fee is charged • Offer drug testing for employers and charge a fee • Explore additional methods and create a plan • In Process 	Finance Committee
		During 2006, EWIB will increase grant funds by 5%	<ul style="list-style-type: none"> • Explore additional grant opportunities • Determine which grant opportunities fall within out mission and vision • Increase grant applications by 5% • Achieved 	
		During 2006, EWIB will obtain \$20,000 from relevant local governmental funding sources	<ul style="list-style-type: none"> • Increase LEO involvement • Determine what local governmental funding sources are relevant to workforce development • Develop and communicate benefits for those funding sources to support workforce development • Request funds from those funding sources • In Process 	
There is a lack of accountability for and integration within the One Stops	Create an integrated system that is accountable for its funds	By February 2006 EWIB will establish a system oversight committee	<ul style="list-style-type: none"> • Established February 2006 • Achieved 	System Oversight Committee
		By April 2006 EWIB will establish tasks for the Committee	<ul style="list-style-type: none"> • Achieved 	
		By June 30, 2006, EWIB will build common system	<ul style="list-style-type: none"> • Achieved 	

Critical Issue	Goal	Objective	Strategy	Who is Responsible
		measures		
		By December 2006 all partners will be informed of the system measures and Committee tasks	<ul style="list-style-type: none"> • Achieved 	

TABLE J: EASTERN WORKFORCE INVESTMENT BOARD CRITICAL ISSUES, GOALS, OBJECTIVES, STRATEGIES AND MEASUREMENTS (CONT.)
(Eastern Workforce Investment Board Strategic Planning Session December 2005)

Critical Issue	Goal	Objective	Strategy	Who is Responsible
We do not understand the education system from start to end	Create a life long learning mindset within the region	By May 31, 2006, EWIB will choose one of the industry clusters to research	• Achieved	Education Committee
		By August 31, 2006, EWIB will determine which of the jobs and careers within the cluster require training beyond K-12	• Achieved	
		By December 31, 2006, EWIB will work with training institutions to determine who provides curricula for the jobs and careers requiring training beyond K-12	• In Process	
		By February 2007, EWIB will publish and distribute a brochure indicating the jobs/careers that require training beyond K-12	• In Process	
There is a lack of a <i>regional</i> economic development process	Create and/or support a regional economic development process	By February, 2007, the EWIB will find 5 new ways to support economic development	• Achieved	Business Development Committee
		From July 1 – December 31, 2006, the EWIB will present 5 economic development presentations within the region	• Achieved	
There is a lack of understanding of the workforce development system	Increase awareness of the workforce development system	By August 31, 2006, EWIB will develop a marketing plan and process to educate the general public about the region's labor market information	• Achieved	System Oversight Committee
		By September 30, 2006, EWIB will develop a marketing plan and process to reach potential job seekers	• Achieved	
		By October 30, 2006, EWIB will develop a marketing plan and process to reach all businesses within the region	• Achieved	

TABLE J: EASTERN WORKFORCE INVESTMENT BOARD CRITICAL ISSUES, GOALS, OBJECTIVES, STRATEGIES AND MEASUREMENTS (CONT.)
(Eastern Workforce Investment Board Strategic Planning Session December 2005)

Critical Issue	Goal	Objective	Strategy	Who is Responsible
Mismatch between skills required for jobs and the skills of the labor force	Increase the match between employer skill requirements and labor force skills	By July 31, 2006, EWIB will present the WorkKeys program to the region using each of the three major labor markets (Okmulgee, Muskogee and Tahlequah)	<ul style="list-style-type: none"> • Achieved 	Education Committee
		During 2006, all Eastern Area One Stops will implement WorkKeys/Key Train	<ul style="list-style-type: none"> • Achieved 	
		By December 31, 2006, EWIB will educate 50% of the employers within each labor market on WorkKeys/ Key Train	<ul style="list-style-type: none"> • In Process 	
Drug problem—which is tied to poverty and the lack of hope	Impact the drug problem within the region	By December 31, 2006, the EWIB will research the drug problem within the region and determine what role the WIB will play in collaboration with others	<ul style="list-style-type: none"> • Bring a speaker to the January 2006 Board meeting to learn more about the local drug issue and its causes • Research who is currently working to address the drug problem locally • Meet with those agencies that we identify are currently trying to address the drug issue • Determine if the EWIB can make some impact with the drug issue and how to address it • If so, determine how to collaborate with others to impact the issue and create a plan to follow • In Process 	Executive Committee

EWIB will establish a tickler system to identify the timelines for each of the objectives to be completed. Each meeting, the items that with a completion date for that month will be reviewed by the Board for completion. Those objectives and strategies not complete by their due date will be examined for the cause of the delay, the root cause of the delay, and, the action needed to progress on the item. All items meeting the timeline will be celebrated and reviewed for the next step(s) to accomplish.

LOCAL AND REGIONAL COLLABORATION

One critical issue the EWIB identified in their strategic planning was the lack of a regional economic development process within the area. Therefore, they created the goal “**Create and/or support a regional workforce and economic development process**”. The EWIB decided they would begin this by identifying 5 new ways to support workforce and economic development and will present five workforce and economic development presentations within the region. EWIB will then build on those activities and continue to align economic and workforce development activities.

The Eastern Workforce Investment Board (EWIB) received Workforce Investment Act funds targeting regionalism. One of the key components of this initiative was the formation of a Regional Economic Development Council (REDC), consisting of 20 regional community leaders. The REDC is charged with designing a strategic plan for building a regional economic and workforce development alliance.

To attract key stakeholders in the region and gather input on the direction of the REDC’s strategic plan, the EWIB hosted a regional economic and workforce development summit on March 8 and 9, 2007. Workforce and economic development professionals, government leaders, businesses and education convened to hear from subject matter experts about trends, issues, and potential models for regionalism.

EWIB is collaborating with Northeast Workforce Investment Board and Southeast Workforce Investment Board to develop an industry-led regional initiative that is responsive to regional manufacturing needs for talent development of the incoming and incumbent workforces. Manufacturing is one of the top demand occupation clusters in eastern Oklahoma. The project engages manufacturing employers to focus on what their workforce needs are for their facilities to remain competitive in today’s changing economy. The three WIB partners will host local focus groups coordinated through the business services teams. The focus groups will consist of only manufacturers voicing their needs and concerns. The data collected during the focus groups will be the basis for a regional manufacturing summit. As with the summit held in March 2007, the WIBs will bring together professionals from area manufacturers, workforce development, economic development and education. The goal of the summit is to develop an industry-led strategic plan that addresses talent development and workforce skill gaps.

The Eastern WIB will facilitate partnerships with local business communities by working toward one of its strategic plan goals “increase the match between employer skill requirements and labor force skills. The objectives for this goal are focused on presenting WorkKeys to the region using each of the three labor markets (Okmulgee, Muskogee and Tahlequah) and educating 50% of the labor market on WorkKeys and KeyTrain and how it will be useful to

employers. To make this match even more effective, the One Stops also implemented WorkKeys and Key Train during 2006. With a tool like WorkKeys to assist, the partnerships with business will be easier to facilitate.

In addition, the Business Services Team will continue to contact businesses to gather data, through focus groups and surveys, about the skill requirements for the employment positions within their businesses and what workforce issues can be solved by the workforce system. Identifying these skill requirements, and then ensuring the training funds for the system are focused on those skill areas, will increase the partnerships with business throughout the Eastern workforce area.

The Eastern WIB will work with the area's local elected officials to teach them the newly learned roles of the WIB, and how that impacts the importance of choosing key decision makers in the area to serve on the WIB. As positions are vacated throughout the year, the WIB will review the membership and determine which key industries, geographic areas, or key decision makers are underrepresented on the WIB and notify the local elected officials. This will ensure the local elected officials make an informed choice for membership replacements.

Another goal developed by the EWIB in their strategic planning session is to create a lifelong learning mindset within the region. They will do this by choosing an industry cluster to research, determining which of the jobs and careers within the cluster require training beyond K-12, working with the training institutions to determine who provides curricula for those identified jobs and careers requiring training beyond K-12, publishing and distributing a brochure indicating the jobs/careers that require training beyond K-12 and the training institutions that can assist individuals in obtaining those skills. This will require the close collaboration of the local education institutions and local economic development key leaders.

EWIB, with partner approval, developed one local memorandum of understanding based on the state's template.

ALIGNING SERVICE DELIVERY

The planning process assisted the EWIB in creating its new vision that is *"To become a region with a world class workforce."* Its new mission, created at the session, is *"The Eastern WIB – creating opportunities to develop a world class workforce."* Both the vision and mission statements indicate the willingness and eagerness of the EWIB to go beyond compliance and address economic and workforce issues of the area and region.

The Eastern Workforce Development system is comprised of four roles:

- system level planning/oversight;
- system operational;
- program planning/oversight and;
- program operational roles.

Although accountable for all four roles, the Eastern WIB shares its responsibilities with various players within the system. The WIB Committees work in conjunction with the full Board to address the system planning and oversight. The Eastern WIB has designated the One

Stop Consortium as responsible for the system operational role. The program planning and oversight are the responsibilities of the various partners within the system. The full service and affiliate One Stops, as well as partner agencies are responsible for the program operational roles.

The strategic plan developed by the WIB sets the stage for collaboration of all of the workforce development activities. Once shared with all of the various players, they work in harmony to achieve the stated goals while addressing the gaps.

As state earlier, the EWIB chartered a Business Services Team comprised of individuals from partner agencies that represent their agencies to businesses within the community. The role of the Business Services Team is to gather data from businesses in order to anticipate their needs. The members of the team work collectively to address the business needs as they are identified.

The EWIB identified “the need for an integrated workforce development system” as a workforce issue during its planning session is. This will be reflected within all core, intensive and training services as the partners integrated each of the services within the three categories. In addition, since partners must provide access to their core services within the One Stop, this promotes the partners working together to provide these core services, thus creating a more integrated system. Providing access to each partner’s core services within the One Stop also addresses the workforce issue that “There is a lack of understanding of the workforce development system.” One of the core services that is required by the legislation is distribution of information about the services available within the One Stop Center and system. Providing this as a core service will ensure more customers have a better understanding of the workforce development system.

Another key workforce issue identified by the EWIB during its strategic planning session is the “*mismatch between skills required for jobs and the skills of the labor force*”. By providing WorkKeys and Key Train through all One Stops within the Eastern area, this workforce issue is addressed.

STRATEGIC PLAN IMPLEMENTATION

EWIB created within their strategic planning process the governance/committee/staffing structure to meet the goals, objectives and strategies set forth in the plan.

Developing a workforce system that supports economic development by facilitating cooperative efforts is not just a state vision, but also an EWIB vision. One of their goals is to “Create and/or support a regional economic development process”. Through implementing their objectives and strategies that support this goal, the EWIB will also be supporting the state’s vision.

The Eastern Workforce area is seen as a neutral entity due to the structure of the workforce system. This system has separate agencies providing the various responsibilities of the system. The LEOs designated the EWIB as the fiscal agent. The One Stop Operator is comprised of a consortium of partner agencies including: OESC who provides Wagner-Peyser services, Northeastern State University who provides Adult Basic Education and QuEST, Inc. who provides WIA Adult, Dislocated Worker and Youth Services.

All of these agencies, although separate entities, work in collaboration to ensure the workforce development system’s goals are met.

The EWIB learned in the strategic planning process that one role of the WIB is to create and lead an integrated workforce development system, instead of just manage WIA programs. By creating the complete system, with multiple partners supporting it, the system will not be focused merely on individuals eligible for specific funding sources, but poised to address any job seeker or employer needing some type of workforce development service.

One of the EWIB goals is to “Create an integrated system that is accountable for its funds.” The system oversight committee to be established will set the parameters to create a One Stop that can meet all individuals in need of workforce development services. Additionally, the flow of services and integration plan ensures that all populations receive the services they need.

Beginning in calendar year 2006, the EWIB restructured its meeting agendas to a “consent agenda”. This allows for time within each meeting for the EWIB to focus on one main issue per meeting. A speaker or presenter will be invited to foster new learning and then facilitate discussion as to how the EWIB will address the issue. Also at each meeting, the Committees will bring to the full Board the progress made on each of their assigned goals. Daily operations of the One Stop and/or WIA activities will be assigned to a committee who will update the full Board as needed.

The Eastern WIB works with the area’s local elected officials to teach them the newly learned roles of the WIB, and how that impacts the importance of choosing key decision makers in the area to serve on the WIB. As positions are vacated throughout the year, the WIB reviews the membership and determine which key industries, geographic areas, or key decision makers are underrepresented on the WIB and notify the local elected officials. This will ensure the local elected officials make an informed choice for membership replacements

MEASURING ACHIEVEMENT

EWIB established a tickler system to identify the timelines for each of the objectives to be completed. Each meeting, the items that with a completion date for that month will be reviewed by the Board for completion. Those objectives and strategies not complete by their due date will be examined for the cause of the delay, the root cause of the delay, and, the action needed to progress on the item. All items meeting the timeline will be celebrated and reviewed for the next step(s) to accomplish.

SECTION III. INTEGRATION OF WIA COMPLIANCE WITH STRATEGIC PLANNING

OPEN MEETINGS

The Eastern Workforce Board maintains all polices and working definitions in the EWIB office in Muskogee. Also, all policies are available on the WIB website.

The EWIB assures that local policies and working definitions, including updates and changes are readily accessible by posting them on the EWIB website at www.easternwib.com.

The Eastern Workforce Board periodically reviews all policies to ensure they reflect the current trends within the area. In addition, as they receive new federal and state policies the EWIB reviews current policies to determine if they are in compliance with those new policies. Changes and or new EWIB policies are developed and brought to the full EWIB for approval. As new legislation is drafted, the EWIB reviews current polices to ensure they will prepare the local area for the new legislation. If not, new policies are developed. Upon approval by the EWIB, all newly revised policies are published to the EWIB website.

Table K on the following page identifies the working committees of Eastern Workforce Investment Board and each committee's responsibilities.

TABLE K: EASTERN WORKFORCE INVESTMENT BOARD COMMITTEES AND RESPONSIBILITIES
(Eastern Workforce Investment Board 2007)

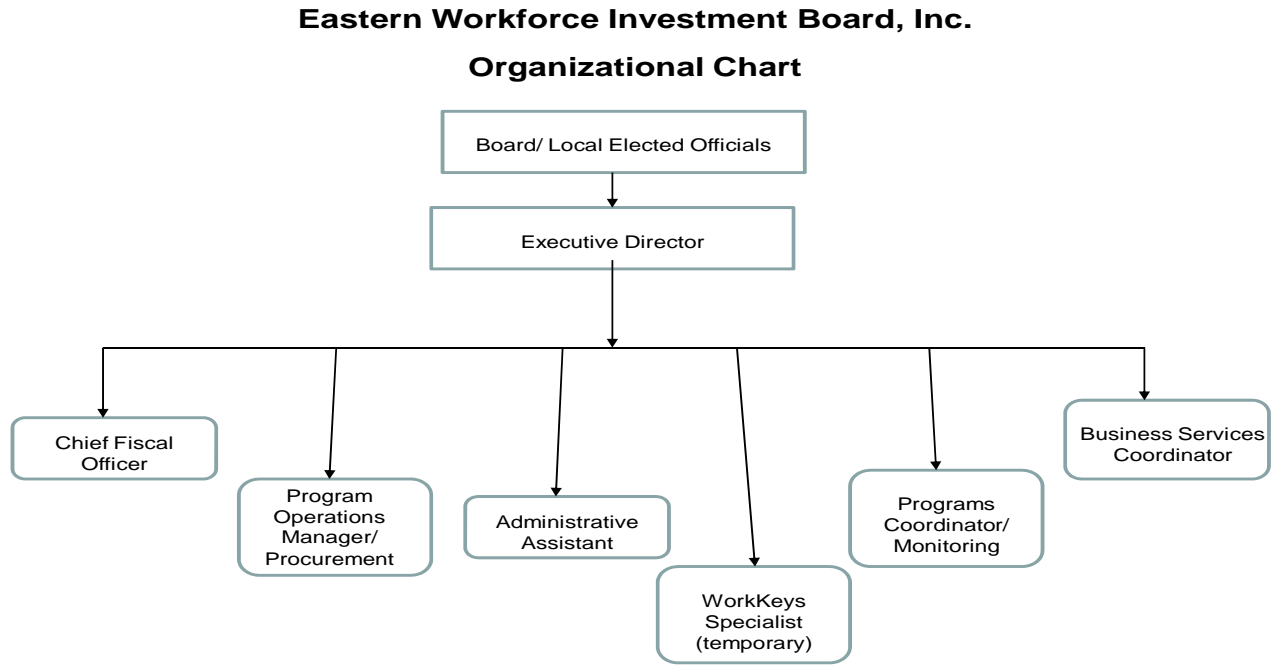
Committee	Responsibilities
Executive	<ul style="list-style-type: none"> • Makes policy decisions necessary during the interim period between BOARD meetings; • Acts as personnel and administrative/policy committee
Business Development	<ul style="list-style-type: none"> • Creates and/or supports a regional economic development process; • Creates a sense of urgency about the importance of a competitive workforce, and assures that the industry clusters, employers and workers know of the available workforce development support services.
Education	<ul style="list-style-type: none"> • Creates a life long learning mindset within the region • Eliminates barriers which inhibit workers from getting the education/training needed to be employable and employers from getting the quality/quantity of the workforce needed. • Evaluates training providers to ensure compliance and that employment and training needs relating to area industry clusters are being met
Finance	<ul style="list-style-type: none"> • Reviews program budgets and expenditures, report variances to the Workforce Investment Board. • Reviews audit reports and financial aspects or program monitoring reports, making recommendations as needed.
System Oversight	<ul style="list-style-type: none"> • Creates and oversees an integrated system that is accountable for its funds • Aligns workforce development, economic development and education. • Builds a demand-driven workforce system, which clearly reflects the employment and training needs of industry clusters, knows the status of the available labor pool, and promotes strategies to assure a competitive labor pool in terms of quality/quantity.
Youth Council	<ul style="list-style-type: none"> • A mandated component of the Workforce Investment Board: • Provides the framework for developing comprehensive and effective strategies that ensure youth acquire the education, skill, work experience and support they will need to reach their full potential and successfully transition to productive adulthood. The mandated partners bring together a diverse set of stakeholder and resource to accomplish this mission.

GOVERNANCE AND BOARD COMPOSITION

The Eastern WIB will work with the area’s local elected officials to teach them the newly learned roles of the WIB, and how that impacts the importance of choosing key decision makers and Targeted industries representatives in the area to serve on the WIB. As positions are vacated throughout the year, the WIB will review the membership and determine which key industries, geographic areas, or key decision makers are underrepresented on the WIB and notify the local elected officials. This will ensure the local elected officials make an informed choice for membership replacements.

Section 4.04 of the WIB Bylaws state “The Board shall recruit and employ staff necessary to carry out its function.” The EWIB directly hires staff to assist in implementing its strategic plan, and to guide the workforce system. The EWIB currently has the following staff positions: Executive Director/Internal Controls Coordinator, Chief Fiscal Officer, Business Services and Outreach Coordinator, Program Operations Manager / Procurement Officer, Program Coordinator / Monitor, WorkKeys Specialist and Executive Assistant. Chart A on the following page represents the current organizational chart of the Board and its employees.

CHART A: EASTERN WORKFORCE INVESTMENT BOARD INC. ORGANIZATIONAL CHART
 (Eastern Workforce Investment Board 2007)



The Workforce Investment Act establishes limitations on roles of the local board (including Board Staff) in §117(f)(1) and §117(f)(2). The final rules discuss these limitations in section 661.310.

FISCAL AGENT

The fiscal agent responsible for the disbursement of grant funds is the Eastern Workforce Investment Board.

DIRECT SERVICES AND INFRASTRUCTURE PLAN

The Eastern WIB Committees assist in eliminating service delivery duplication and support coordination of services. First, the Oversight committee ensures that integration of services occurs among the partner agencies. Second, the Business Development Committee ensures the partners and economic development agencies work together to collectively provide services to address business needs. Third, the Education Collaboration committee reduces the duplicative efforts of the system partner and the education system by communicating businesses skill level needs so that common education, career tech and higher education teach those skills, thus requiring the workforce system to only augment those services, instead of have to be the sole provider of them. In addition, the Youth Council (once it is reorganized) will ensure that WIA funds are used to augment the services being provided currently by other youth service provider agencies. And finally, the WIB Finance Committee, in reviewing the program budgets and expenditures, will determine how the WIA service providers are leveraging funds with other community agency partners to avoid duplication.

SELECTING AND CERTIFYING OPERATORS

Consistent with Section 121 of the Workforce Investment Act of 1998, the Eastern Workforce Investment Board (EWIB), with the Agreement of the Chief Local Elected Official (CLEO), shall designate or certify One-Stop operators. Three partner agencies have created a consortium to serve as the One-Stop Operator. The Eastern Workforce Investment Board, with the agreement of the Chief Local Elected Official, has designated and certified the One Stop Operator Consortium.

CONTRACTING FOR SERVICE PROVIDERS

For the Adult and Dislocated Worker core services, the EWIB gathered all of the workforce development system partners and conducted a service mapping activity to determine which services should be contracted out, and which services were already provided by partner staff and did not need WIA Title I funds to augment those services. Table L on the following page indicates the matrix that was developed through the service mapping process. Those bolded boxes within the chart indicate identified core service provider based on partnership review and work teams in the Centers. In addition to the cores services listed below in the WIA row, EWIB contracts out all intensive and training services for WIA-registered Adults, Dislocated Workers, and the ten required elements for the WIA Youth Programs.

TABLE L: EASTERN WORKFORCE INVESTMENT AREA MINIMUM CORE SERVICE MATRIX

	Outreach/Intake Orientation	Eligibility Determination	Assessment	Placement	Labor Market Information	Performance Accountability	Supportive Services**	Financial Assistance Info	Follow-up/Retention
OPERATOR	✓	✓	✓	✓	✓	✓	✓	✓	✓
OESC	✓	✓	✓	✓	✓	Performance of system is One Stop Operator's responsibility	✓	✓	
DHS	✓		✓	✓	✓		✓✘	✓	✓
DRS	✓		✓	✓	✓		✓✘	✓	✓
WIA	✓	✓	✓	✓	✓		✓✘	✓	✓
Title V	✓			✓			✓		
CREEK	✓		✓	✓	✓		✓✘		✓
CHEROKEE	✓		✓	✓	✓		✓✘		✓
ABE	✓		✓				✓		
HOUS AUTH	✓						✓	✓	✓

** Supportive Services- ✓= information/referral only
 ✘= organization/agency provides supportive services

 Indicates identified core service provider based on partnership review and work teams in Center

One-Stop Operator will oversee core services and is responsible for performance accountability of one-stop system in LMA

The Eastern WIB issues Request for Proposals (RFP's) to provide employment and training services for Adults, Dislocated Workers, Business Services, and Youth activities under the Workforce Investment Act within Adair, Cherokee, McIntosh, Muskogee, Okmulgee, Sequoyah, and Wagoner counties in Oklahoma. The programs will be funded under the Workforce Investment Act of 1998, P.L.105-220, 20 USC 9201.

As the Business Services Team collects information on the required skills and skills levels of the labor force, the Eastern WIB will review the number and types of services for which it will be

The Eastern WIB works with our community partners to ensure that the needs of special participant populations with multiple barriers are being met. Referrals to Adult Basic Education to increase literacy rates are a top priority in order to create a world class workforce and increase job obtainment and retention. Adult Basic Educations literacy and General Education Diploma preparatory courses are vital to increasing the strength of our workforce.

GRIEVANCES AND COMPLAINTS

Complaint information will be collected, analyzed and filed as it is received based on the nature of the complaint. WIB staff will collect and analyze the information at least quarterly and make necessary changes to the appropriate policies.

The EWIB has had very limited complaints. If and when they are received, any necessary changes in policies will be made.

YOUTH SERVICES

TABLE M: EASTERN WORKFORCE INVESTMENT BOARD YOUTH PARTICIPANT SERVICE LEVELS
(Oklahoma State Employment Security Commission 2006)

	PY03	PY04	PY05	PY06	<i>PY07 Planned</i>
<i>Older Youth</i>	108	106	110	60	100
<i>Younger Youth</i>	410	360	390	301	350

TABLE N EASTERN WORKFORCE INVESTMENT BOARD YOUTH PARTICIPANT PERFORMANCE LEVELS
(Oklahoma State Employment Security Commission 2006)

<i>Performance Measure</i>	<i>Funding</i>	<i>PY 2003</i>			<i>PY 2004</i>			<i>PY 2005</i>			<i>PY 2006</i>		
		Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail
<i>Entered Employment Rate</i>	<i>Older Youth</i>	71%	85%	Pass	66%	69%	Pass	67%	100	Pass	68	66	Fail
<i>Retention Rate</i>	<i>Older Youth</i>	79%	82%	Pass	80%	92%	Pass	81%	100	Pass	82	72	Fail
	<i>Younger Youth</i>	56%	28%	Fail	60%	77%	Pass	61%	73.2	Fail	62	72	Pass
<i>Earnings Change</i>	<i>Older Youth</i>	2650	6103	Pass	2700	5444	Pass	2850	4572	Pass	3000	4444	Pass
<i>Credential Attainment Rate</i>	<i>Older Youth</i>	53%	54%	Pass	55%	57%	Pass	56%	78.6	Pass	57	18.2	Fail
<i>Diploma/GED Rate</i>	<i>Younger Youth</i>	58%	69%	Pass	60%	71%	Pass	56%	41.1	Pass	57	47.8	Fail
<i>Skill Attainment Rate</i>	<i>Younger Youth</i>	74%	87%	Pass	75%	80%	Pass	76%	86.1	Pass	79	66.4	Fail

When measures are not met, the Eastern WIB provides technical assistance to the service provider. The Board also asks the service provider to complete a root cause analysis of what system delivery flaw has led to the failed measure, and to create a corrective action plan to address that root cause.

The Board continually evaluates performance. Changes are made to policies and service delivery as necessary for continuous improvement. The Board has established a committee to review provider performance. Also, providers must submit monthly reports to the Board for review. This process will ensure that weaknesses are identified and corrected on a timely basis. The Board is in the process of

reestablishing the Youth Council to ensure that they are in compliance with the required membership and that those members are the movers and shakers in the community. The Board will also engage other youth partners in order to maximize all the resources that are available for youth.

The Board has plans to ensure that more members are included on the Youth Council which will help with aligning those services with the Board's mission and vision.

Continued technical assistance to service providers, assistance with continuous improvement efforts, gathering and distributing best and promising practices from throughout the nation to the service providers are some of the strategies the EWIB is implementing to exceed standards, improve services and increase market penetration.

Eastern Workforce Investment Board, Inc. has developed a supportive services policy to provide procedural guidance for the administration of supportive services, including training supportive services, to all customers, including WIA youth customers enrolled in Eastern Workforce Investment Board (EWIB) administered programs. It is the intention of EWIB administration to require the staff to abide by any law, rules, regulation or policy and that the supportive service procedure may be periodically revised as needed.

Supportive Service is any service that is provided to the WIA youth customer to support the customer's attachment to the labor force. Supportive Services may be used to ensure the youth customer's ability to participate in the Workforce Investment Act and other agency programs by overcoming barriers impeding their ability to enter employment. WIA funds are used for support services only if the individual is unable to access the service from any other agency through a referral process.

The comprehensive youth services and funding created under the Workforce Investment Act (WIA) provide a key starting point for any youth employment program. One of the goals under WIA is to transform the youth service delivery system from a myriad of discrete programs that focus on short-term outcomes to a comprehensive system that helps youth achieve the long-term goals of higher education and living wage careers.

The design framework of local WIA youth program will include:

- An objective assessment of each youth participant, which includes a review of academic and occupational skill levels and service needs.
- An individual service strategy for each youth participant based on the individual's assessment results. The strategy should include an age-appropriate career goal.
- Preparation for postsecondary educational opportunities, linkages between academic and occupational learning, preparation for employment, and effective connections to intermediary organizations that provide strong links to the job market and employers.

EWIB will select providers using a competitive process based on recommendations of its Youth Council (WIA section 17(h)(4)(B), 29 USC 2832). Youth service providers will be selected based on experience and competency in meeting the needs of the youth population especially those groups targeted by WIA and EWIB.

In addition to making recommendations to the WIB regarding the selection of WIA youth funded service providers use of WIA funds, the Youth Council is responsible for:

- Developing a local plan for youth services;
- Recommending the use of WIA youth funds;
- Overseeing WIA youth services and determining performance outcomes; and

- Coordinating local youth programs and initiatives.

Youth programs will be evaluated yearly on performance standards under which youth programs are measured. Using the Common Measures and any “system” measures developed by EWIB, the Youth Council will review the program’s design’s effectiveness. In addition, EWIB will ensure that the framework is equipped to support emerging trends, current and future workforce goals and youth strategies by the following methods:

- Quality Management. Organizations operating effective initiatives are characterized by stability, sound management, experience and capacities, and strong staff qualifications.
- Youth Development. Effective initiatives exhibit a conscious and professional reliance on youth development principles to identify or shape program activities and to drive the kinds of outcomes that are sought for young participants.
- Workforce Development. Effective initiatives consciously aim to prepare youth for the workforce; connect successfully to employers; make appropriate use of training, workplace exposure, work experience, and education as tools in that effort; and consistently emphasize the connection between learning and work.
- Evidence of Success. Effective initiatives collect and make use of credible data or other measures that reflect the soundness of their goals, their operational effectiveness, and their ability to achieve desired outcomes.

Collectively with partners who work to serve the area’s youth, research, collaboration, and linkages will provide a knowledge base from which EWIB can draw principles of effective practice by identifying and disseminating the critical programmatic elements. Current and future employment trends and strategies can spearhead the redefinition of effective youth employment and training practices.

It is anticipated that quality will continuously be enhanced through the experience of running a comprehensive year round program and the evolution of experienced Youth Councils. Principles that define quality programming for youth include:

- designing program activities to reflect program goals;
- ensuring the ongoing participation of caring adults;
- continuously improving the program based on data collection and analysis, and
- providing long-term follow-up
- If a multi-county area, describe how youth program design is coordinated among the counties.

Initially, the youth program design is established within the Request for Funding Proposals (RFP). As bidders respond to the RFP, they are required to indicate how the program design will be coordinated among the counties, whether one or multiple service providers are chosen. The selected Youth Service Providers will be operating effective initiatives that are characterized by stability, sound management, experience and capacities, and strong staff qualifications. They also coordinate with their staff on a daily basis to coordinate the program’s design and implementation. Daily coordination is also enhanced by the EWIB sponsoring and conducting periodic meetings and training sessions of all service providers.

The New Strategic Vision for the Delivery of Youth Services under the Workforce Investment Act (WIA) of 1998 focuses on serving those populations of youth who are the most in need of employment and training programs, including displaced, homeless, and runaway youth. The impact of

recent hurricanes has created a new population of displaced and homeless families and youth in the United States. Through the support offered under WIA-funded programs, youth can develop the skills and competencies necessary to initiate and maintain self-sufficiency and decrease their personal risk of homelessness.

Out-of-school youth (and those most at-risk of dropping out) are an important part of the new workforce “supply line” needed by businesses to fill job vacancies in the knowledge economy. WIA-funded youth programs will provide leadership by serving as a catalyst to connect these youth with quality secondary and post-secondary educational opportunities and high-growth and other employment opportunities.

In order to achieve the “New Vision” in serving youth, the overall purpose of the WIA Youth program is to:

- Provide, to eligible youth seeking assistance in achieving academic and employment success, effective and comprehensive activities, which include a variety of options for improving educational and skill competencies and provide effective connections to employers;
- Ensure on-going mentoring opportunities, in the workplace and the community; for eligible youth with adults committed to providing such opportunities;
- Provide opportunities for training to eligible youth in order for them to attain self-sufficiency;
- Provide continued supportive services for eligible youth;
- Provide incentives for recognition and achievement to eligible youth; and
- Provide opportunities for eligible youth in activities related to leadership, development, decision making, citizenship and community service.

The majority of youth participants are to be involved in year round activities. The intensity of those services may fluctuate during the year depending on other activities, such as school. However, the general program design and individual service strategies will be based on comprehensive, year round services.

WIA Service providers will develop strategies in serving WIA eligible youth with focus on serving the most-in-need, hard-to-serve, and at risk youth. With limited WIA resources, it becomes even more important to carefully plan strategies on how to more comprehensively serve these youth through close collaboration and partnering with local education agencies and local businesses and economic development agencies.

The EWIB is interested in making the Workforce Centers in its seven county area more youth friendly by reorganizing the centers to ensure they are accessible and inviting to the youth who need services. Accessible and inviting” may include changing the colors on the wall, bringing in brighter posters, and providing more technology-accessed information. The centers will have educational and employment resources available that are timely and appropriate to the needs of the youth being served through the system. Resources will be available which will enable youth to be exposed to career awareness and work readiness opportunities. If it is not feasible to reserve specific areas for youth, then efforts will be made to assure that adequate resources and information is available at the Workforce Centers.

As required by DOL, the investment of WIA youth resources will be demand-driven, assuring that youth obtain the skills needed by businesses so they can succeed in the 21st century economy. WIA Service Provider youth professionals will be knowledgeable of the high-growth industries/occupations in their respective area, what the career pathways are for these jobs, and what

options are available for at-risk youth to access these jobs in order to build a pipeline of future workers. WIA Service Provider youth professionals will also ensure that training funds will be prioritized for eligible youth pursuing high-growth opportunities and that training investments meet industry-specific requirements leading to an industry-recognized credential, when appropriate

In order to ensure the success of an increasingly at-risk youth population in the knowledge economy, the workforce investment system must be committed to utilizing the strategies that lead to higher levels of performance and outcomes. Therefore, all service provider youth professionals will be expected to be knowledgeable about their local economy (e.g., current status, future projections, high-growth industries, career paths).

The new set of common measures for youth programs include: placement in employment or education; attainment of a degree or certificate; literacy and numeracy gains; and an efficiency measure. The introduction of these new measures for the workforce investment system places a new emphasis on literacy and numeracy gains for youth. Service strategies for youth participants will be directly linked to one or more performance outcomes within these common measures. Also, it is important to note that the certificate measure is a demand-driven measure in which certificates are awarded in recognition of an individual's attainment of measurable technical or occupational skills necessary to gain employment or advance within an occupation. These technical or occupational skills are based on standards developed or endorsed by employers.

Attainment of literacy and numeracy gains is viewed as most appropriate for youth with basic skill deficiencies as determined by a basic skills assessment. The increased focus on literacy and numeracy gains for youth provides an impetus to ensuring the service providers operating WIA programs incorporate high quality adolescent literacy programs.

Youth Service providers will be required to design a framework of youth activities and services in accordance with USDOL Common Measures Policy keeping in mind the following:

- The tighter definition of certificate and does not have employment as a component like the current credential measure
- Education refers to those in secondary, post-secondary, adult education, or any other organized program of study that leads to a diploma, GED, or certificate
- The measure includes individuals in secondary school at exit.
- Outcomes can be attained during participation
- Diplomas, GEDs, or certificates can be obtained while a person is still receiving services or at any point prior to the end of the 3rd quarter after exit.
- Diploma, as defined by TEG 28-04, is any credential that the State Education agency accepts as equivalent to a high school diploma.

ETA is currently working to fully define Work Readiness Credentials content areas with foundational academic and workplace competencies and will soon issue guidance that explains the criteria. EWIB will offer feedback on this issue when ETA has the guidance available. Once this guidance is distributed, EWIB will communicate this information with its service providers.

Work Readiness Credentials are included within the Certificate Measure if:

- awarded by a state educational agency, an institution of higher learning, or an employer organization ; or
- reliable and valid procedures are used to assess at least two foundation academic competencies (reading, writing, mathematics, critical thinking, communication, etc.) and at least two workplace

competencies (teamwork, ethics, customer service/focus, problem solving, decision-making, use of computers, etc.); or

- they have been developed and/or endorsed by business.

Therefore, EWIB will work closely with education institutions and local businesses to develop the work readiness credentials.

Eastern Workforce Investment Board will ensure that follow-up services are made available as appropriate to WIA Youth participants for a minimum of a 12-month period after the completion of participation. The follow-up services provided will be based on the needs of the individual. Prior to exiting from services, the service provider staff will establish a follow-up contact schedule with the customer. This will ensure the customer knows that follow-up services are available, and the staff and customer maintain contact during the year to determine if and what follow-up services are necessary.

All follow-up services for youth will be tailored to the needs of the customer. Follow-up services for youth may include:

- Leadership development and supportive service activities;
- Regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise;
- Assistance in securing better paying jobs, career development and further education;
- Work-related peer support groups;
- Adult mentoring; and,
- Tracking the progress of youth in employment after training.

ETA/DOL has set an overarching priority for the entire workforce investment system: meet the demands of business by providing adults and Youth with the necessary educational, occupational and other skills training and services needed for high demand occupations in the 21st century. In that regard, EWIB has developed a new strategic vision to "serve out-of-school and at-risk youth through the workforce investment system." This vision represents new strategies for the investment of WIA youth resources. The vision's focus on connecting youth with high quality education and employment services can be achieved under current law and reflects the principles articulated by the Administration for the reauthorization of WIA

In achieving this objective, the WIB and its Youth Council will actively seek membership and participation in the development of youth services from those industries in the local areas who make a major impact on the local economies. Input from these industries will be critical in designing training and employment activities for youth that will lead to self-sufficiency.

WIA charges Local Youth Councils with the responsibility for establishing appropriate linkages to entities that foster the participation of eligible youth. These linkages may include connections to local area juvenile justice and law enforcement officials, local public housing authorities, foster care, Higher Education, local education agencies, Job Corps representatives, and representatives of other area youth initiatives. In addition, Youth Councils are required to establish linkages with other organizations serving youth in the local area

EWIB expects a high level of coordination and collaboration at the local level. EWIB envisions partners that include workforce development professionals, schools, community and faith based organizations, Job Center partners, work-based learning providers such as youth apprenticeship and

Tech-prep, post-secondary institutions, human/social service agencies and others to strategically align and leverage resources to create community youth assistance strategies.

Programs will be more closely linked to local labor market needs and will be based on the overall strengths and needs of local area youth. This identification of partners and available programs and services will include School-to-Work, Foster Care, Job Corps, Welfare to Work, and TANF funded programs such as Workforce Attachment and Advancement and Community Youth Grants

To encourage integration of services across programs (WIA Title I funded and non-WIA Title I funded) and recognize shared contributions toward outcomes, the following strategy for tracking and reporting on the core measures across programs will be used. WIA Title I funded youth programs can include in the reporting those participants who receive services provided by non-WIA Title I funded school-to-work (i.e., schools) and one-stop partner programs in the WIA core measures as long as the individual has been registered for WIA Title I youth services (all individuals receiving youth services will be registered) and:

- is concurrently receiving WIA Title I funded youth services while receiving partner services;
- is scheduled to receive WIA Title I funded youth services at a future date while receiving partner services or upon exit of the partner services; or,
- receives partner services, and can be tracked while receiving and upon exit of partner services.

Tracking youth across WIA Title I and non-WIA Title I programs can be more effectively implemented in communities with strong school-to-work partnerships linking schools to workforce investment services. Therefore, EWIB will continue to create and enhance those linkages.

The current WIA youth service providers are Oklahoma State University-Okmulgee Technical Branch who provide services in McIntosh, Muskogee, Okmulgee and Wagoner Counties and QuESTT, Inc. who provide youth services in Adair, Cherokee and Sequoyah counties.

The services available to youth are:

- Outreach and Recruitment
- Eligibility determination
- Tutoring, study skills and instruction leading to completion of secondary school and dropout prevention
- Alternative school services
- Summer employment opportunities linked to academic and occupational learning
- Paid/unpaid work experiences
- Occupational skill training
- Leadership development opportunities
- Supportive services
- Adult mentoring for not less than 12 months
- Follow-up services for not less than 12 months
- Comprehensive guidance and counseling

By developing a service matrix with all of the partners, EWIB has determined the other agencies that provide youth services within the area in order to leverage additional through integrated services.

Eastern Workforce Investment Board, Inc. issues a Request for Proposals (RFP) to solicit competitive proposals for delivery of all services under the Workforce Investment Act Title I Youth programs in the area. They utilize the guidance of the Workforce Investment Act Section 123: Selection of WIA Title I Youth Activity providers that states: “From funds allocated under paragraph (2) (A) or (3) of section 128(b) to a local area, the local board for such area shall identify eligible providers of youth activities by awarding grants or contracts on a competitive basis, based on the recommendations of the youth council and on the criteria contained in the State plan, to the providers to carry out the activities, and shall conduct oversight with respect to the providers, in the local area.”

Once awarded, each contract begins July 1, with an ending date of June 30th of the following year; The Board reserves the right to extend the contract for two consecutive years (in one year increments) from the original contract ending date, if it is in the Board’s best interest to do so. Subsequent contract years run twelve months, July 1 to June 30 of each year.

The review criteria include:

- Proposal submitted within the required timetable and format
- Organization’s ability to provide all required services
- Return on Investment of the proposed activities
- Organization’s fiscal capability
- Organization’s connectivity with local businesses. (Successful proposals for WIA youth services must demonstrate a well-developed and intuitive post-employment strategy that includes employer connections and strong participant support systems. Successful proposals will also demonstrate experience in working with employers to match qualified job seekers with job openings.)
- Organization’s willingness to become a Partner in the Workforce Oklahoma System: In describing their program designs, bidders must indicate a clear understanding of the one-stop principles and the requirements of Workforce partners. In addition, successful bidders must describe how their proposal will enhance the current Workforce system – specifically, how their program design will add value to the system. Proposals should incorporate a description of current involvement as or future implementation plans for become a Workforce Oklahoma partner. Requirements for becoming a partner include the following:
 - Dedication of WIA staff time to providing services for employer and job seeker customers at the site(s) where staff are located;
 - Attendance at partnership meetings;
 - Participation in or facilitation of various workgroups assigned by the Operators;
 - Participation in Continuous Quality Improvement efforts;
 - Successful contribution to overall Workforce Oklahoma system performance measures;
 - Support the local council and its subsequent task forces with:
 - Meeting schedules and locations
 - Agendas
 - Follow-up activities
 - Record-keeping;

- Compile reports and track data relating to system performance compared to pre-determined criteria;
- Establish and maintain key relationships with local service providers to collaboratively integrate the workforce development system in the local labor market;
- Coordinate the provision of standardized core services across all service providers;
- Coordinate service delivery strategies for a diverse customer base;
- Sharing best practices and innovative service delivery strategies with partners;
- Demonstration of visible and reliable staff presence, which includes co-location at the Workforce Oklahoma Center(s) during the entire duration of the contract;
- Ability and capacity to implement the OSL tracking system;
- Willingness to sign the required Memorandum of Understanding with relevant Workforce Oklahoma partners.

The Youth Council reviews each proposal and makes recommendations to Executive Committee who make a recommendation to the full Eastern WIB for final selection of youth service providers.

A cornerstone of the Board's mission includes a strong focus on youth. The priorities of the mission serve as important guidance to help youth succeed in school, at work, and as members and leaders of their communities. The Board's youth services focus is to:

- Build strong partnerships with education (K-12, post-secondary, technical colleges) and with other workforce organizations; and
- Strengthen worker readiness through education and attainment of work maturity and job skills

The major components of the WIA youth program offer guiding principles to ensure the needs of young people are met. Since the target population of WIA Youth includes both in-school and out-of-school, services provided reflect the priorities of each of these unique populations.

In-school priorities will include comprehensive and integrated services that promote enhanced academic achievement; successful graduation; awareness of post-secondary and technical education; work readiness; and connections to the world of work. The focus will be on drop out prevention; preparation for post-secondary college or technical schools; and assistance with work related goals. These priority services are delivered as a result of a partnership with the school system in which the youth is enrolled.

Out-of-school priorities for younger youth (ages 14 – 18) include returning the youth to school for secondary education completion; awareness of post-secondary and technical education; work readiness; and connections to the world of work. For those who are 19 -21 years old, primary emphasis will be on completing their secondary-education and on building connections to advanced training and/or post-secondary education tied to the completion of a WIA approved credential. For older out-of-school youth, a plan for financial self-sufficiency is the backbone of the service strategy.

Youth Services holistic approach begins at the initial registration and continues through the post-exit follow-up. Contractors must provide, at a minimum, the following basic services:

- **Outreach and Recruitment:** Includes, but is not limited to, identifying potentially eligible youth, working with parents or guardians to secure necessary documentation, and communicating with schools and community organizations to facilitate outreach and recruitment.
- **Orientation:** Included in the orientation, youth must receive information on all available services

through the bidder, as well as information on other youth service providers and Workforce Oklahoma. This process would also include an introduction to the responsibilities of the youth and the System's expectations with regards to drug and alcohol abuse, governing policies, behavior and attendance.

- **Eligibility Determination and Registration:** This process includes the use of an application form to generate all information necessary to determine eligibility and meet reporting requirements. It also includes the maintenance of adequate documentation to ensure the credibility of the eligibility determination, which shall at a minimum consist of documents used to determine and verify eligibility. Registration is the process of collecting information to support a determination of eligibility. Equal opportunity data must be collected during the registration process.
- **Objective Assessment:** For each youth participant, an objective assessment must be provide that meets the requirements of WIA section 129(c)(1)(A) and that incorporates a review of the youth's skill levels including basic skills, occupational skills, prior work experience, employability, interests, aptitudes (including interests and aptitudes for nontraditional jobs), supportive services needs, and developmental needs.
- **Individual Service Strategy (ISS):** For each youth participant, an individual service strategy must be developed that meets the requirements of WIA section 129(c)(1)(B) and includes the identification of an age-appropriate career goal, taking into consideration the youth's assessment results and preparation for post-secondary educational opportunities. The ISS information is to provide linkages between academic and occupational learning, provide preparation for employment, and provide effective connections to intermediary organizations that provide strong links to the job market and employers.
- **Case Management:** Through individual connection with participants, Case Managers will serve as the youths' advocate within the education, training, and employment arenas.
- **System Building:** Working together as a system, case managers will be goal oriented and customer driven by motivating participants and coordinating services. WIA Case manager will bring community resources together to leverage funds and develop opportunities for youth.
- **Health and Safety:** All participants will be provided with information and instruction, as a curriculum or part of a curriculum, on the subject of health and safety. In addition, orientations will be provided to all work-related site supervisors regarding worker health and safety issues.
- **Referral Services:** In addition to the information shared at the orientation level, participants should receive referral information regarding the full array of applicable and appropriate services. To best meet the needs of youth, organization are strongly encouraged to network and partner with other youth serving agencies.
- **Supportive Services:** Intended to enable an individual to participate in program activities and to secure and retain employment, examples include assistance with local transportation costs; childcare and dependent care costs; housing and food; and relocation and out-of-area job search expenses.
- **Retention Services (Follow-Up Services):** Post-exit services that may include continued case management; employment retention services; supportive services; counseling; and training, are allowable under WIA. These services are intended to assist customers in maintaining and succeeding in their jobs, as well as progressing in wage levels to achieve self-sufficiency.
- **Individual Services based on in-school or out-of school, younger or older Youth:**
 - *In-School* – the term “in-school youth” means an eligible Youth that is attending the secondary

school system, including alternative school.

- ***Out-of-School*** – the term “out-of-school youth” means an eligible youth who is a school dropout or who has received a secondary school diploma or its equivalent but is basic skills deficient, unemployed, or underemployed.
- ***Younger Youth*** – An eligible youth between 14 and 18 years of age.
- ***Older Youth*** – An eligible youth between 19 and 21 years of age.
- **Summer Activities:** Summer youth employment must provide direct linkages to academic and occupational learning and may provide other elements and strategies, as appropriate, to serve the needs and goals of the participants.
- **Placement, Retention, and Wage Progression:** Bidders must demonstrate how they will ensure job placement, job retention, and wage progression in a difficult economy.
- **Adult Transition Services for Older Youth age 18 – 21:** For low-income youth between 18 and 21 years of age, the WIA youth and adult systems overlap. The Board would like to increase collaboration between WIA Youth and Adult programs for these older youth.

Currently, all services, except for some of the summer programs are conducted within the One Stop Centers. LMA 18 Center has a corner of the Center dedicated to the youth. This approach will be incorporated into the Centers in the other labor market areas.

The Eastern Workforce Investment Board, Inc. has defined “**requires additional assistance to complete an educational program, or to hold and secure employment**” as a youth who has one of the following characteristics or combination of characteristics substance-abuse; lacking fundamental skills; alternative school enrollees; disability (learning or physical); poor work history; or lacking work readiness or occupational skills.

The EWIB definition of “**Deficient in basic literacy skills**” is as follows: Computes or solves problems, reads, writes, or speaks English at or below grade level 8.9; or is unable to compute or solve problems, read, write or speak English at a level necessary to function on the job, in the individual’s family or in society.

General Eligibility Requirements

Youth are eligible to receive WIA services if they are:

- 1) **A citizen of the United States or an eligible non-citizen whose status permits them to be employed in the United States.**

Eligible non-citizens are required to show a current “Resident Alien Card” issued by the Department of Justice, Immigration and Naturalization Service (INS), or they have certification from INS that they are eligible to work. Such certification may be in the form of a card, a letter, or a notation in the alien’s current passport.

Documentation sources include Birth Certificate, a DD-214 if it shows place of birth, Baptismal Certificate, a Hospital Record of Birth, INS documents, Native American Tribal Document which documents U.S. Citizenship, Food Stamp Records, Public Assistance Records, collateral contact with INS and other documents listed in OETI 20-2001.

- 2) **Selective Service Registrant as Required, Age 18 to 25.**

To document registration with the Selective Service System, acceptable sources are a Selective Service Registration Certificate or an SSS Letter of Registration. For applicants who are unable to provide a document, staff should call the Selective Service System’s telephone number or verify on the

SSS website. (Note: if an enrolled youth turns 18, the youth service provider must ensure the youth is registered with selective service and documentation added to the participant's file)

3) Not less than 14 years of age and not more than 21 years old.

Acceptable documentation sources include Birth Certificate, Drivers License, School ID Card, School Record, Tribal Record, Work Permit, Passport, Military ID, UI document or other government agency referral form or document, or other Federal, State, or Local Government-Issued ID.

4) Meets one of the following low-income criteria.

- a) Receives, or is a member of a family that receives cash payments under a Federal, State, or local income-based public assistance program; Documentation sources include Public Assistance Records, Social Service Agency contacts, interagency referrals, and/or TANF Award Letter. The applicant must be receiving or be a member of a family receiving cash welfare payments under a federal, state, or local welfare program
- b) Received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program, that in relation to family size does not exceed the higher of the poverty line, for an equivalent period, or 70% of the lower living standard income level, for an equivalent period.
 - i) Family size must first be determined. Family income must then be determined and may be documented by using any of the acceptable income verification forms listed in OETI 20-2001.
- c) Is a member of a household that receives or has been determined within the 6-month period prior to application to be eligible to receive food stamps; Documentation sources are the same as category a.
- d) Qualifies as a homeless individual as defined above.
- e) Is a foster child on behalf of whom state or local government payments are made Documentation may include court contact, court documentation, medical card, verification of payments made on behalf of the child, or a written statement from a State or local agency.
- f) Is an individual with a disability whose own income meets the income requirements above but who is a member of a family whose income does not meet those requirements.

5) And; possess one or more of the following characteristics:

- a) **Deficient in basic literacy skills:** Computes or solves problems, reads, writes, or speaks English at or below grade level 8.9; or is unable to commute or solve problems, read, write or speak English at a level necessary to function on the job, in the individual's family or in society.
- b) **A school drop out:** Documentation may be in the form of written statement from school, telephone verification with school or applicant statement.
- c) **Homeless, a runaway, or a foster child:** Documentation may be in the form of a written statement from shelter, written statement from social service agency or written statement from individual providing temporary residence.
- d) **Pregnant or a parent:** Documentation may be in the form of birth certificate, medical card, physician's note, or statement from school program for pregnant teens.

- e) **An offender:** Documentation may be in the form of court documents, letter of parole, or letter from probation officer.
- f) **Needs additional assistance to complete an educational program, or to secure and hold employment.** A youth who has one or more of the following substance-abuse; lacking fundamental skills; alternative school enrollees; disability (learning or physical); poor work history; lacking work readiness or occupational skills

A maximum of 5% of the youth served may still be eligible to receive WIA services if they do not meet the low income eligibility criterion. They must be in one or more of the following categories: school dropout; basic skills deficient; educational attainment is one or more grade levels below the grade level appropriate to the age of the individual; pregnant or parenting; disabled, including learning disabled; homeless or a runaway; offender; or face serious barriers to employment.

The local definition of a youth who faces *serious barriers to employment* has one or more of the following characteristics:

- **Substance-abuse**-use of illegal or controlled substances that are a substantial barrier to employment or training.
- **Lacking fundamental skills** – in addition to having a deficit in basic reading and math skills, has a substantial lacking of basic life coping skills.
- **Alternative school enrollees** – a youth, who for whatever reason, has been determined to be best served in an alternative school setting and may need specialized or additional services to complete secondary education. A youth attending an “alternative school” is not a “school dropout” under WIA. Alternative education is anything outside the traditional K-12.
- **Disability (learning or physical)** – a physical or mental impairment that substantially limits one or more of the major life activities.
- **Poor work history** – a youth who has very limited or no past work record or has poor work habits.
- **Lacking work readiness or occupational skills** – limited or no transferable work readiness or occupational skills that make it difficult if not impossible to function in the labor market.

The 5% window will allow the EWIB to ensure all potential workers will have the skills necessary to become a part of the “world class workforce” the EWIB is striving to create.

WIA ADULT AND DISLOCATED WORKER AND WAGNER-PEYSER SERVICES

Table O below summarizes the participant service levels for Workforce Investment Act Adult, Dislocated Worker and Wagner-Peyser participants.

TABLE O: EWIB ADULT, DISLOCATED WORKER AND WAGNER-PEYSER PARTICIPANT SERVICE LEVELS
(Oklahoma State Employment Security Commission 2006)

<i>Total Number Served</i>	<i>PY 03</i>	<i>PY 04</i>	<i>PY 05</i>	<i>PY 06</i>	<i>PY 07 Planned</i>
<i>WIA Adults</i>	534	1214	1230	742	800
<i>WIA Dislocated Workers</i>	121	454	602	339	500
<i>Wagner-Peyser Funded Customers*</i>	26,247	15,005	17,174	10,203	15,000

Table P on the following page provides a summary of Eastern WIA's performance for Workforce Investment Act Adult, Dislocated Worker and Wagner-Peyser participants.

TABLE P: EWIB ADULT , DISLOCATED WORKER AND WAGNER-PEYSER PERFORMANCE LEVELS
(Oklahoma State Employment Security Commission 2006)

Performance Measure	Funding	PY 2003			PY 2004			PY 2005			PY 2006		
		Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail	Standard	Outcome	Pass/Fail
Customer Satisfaction	Participants	(These statistics are captured for the entire state and not broken down by workforce area.)											
	Employers	(These statistics are captured for the entire state and not broken down by workforce area.)											
Entered Employment Rate	Adults	75%	86%	Pass	76%	81%	Pass	82%	82.4	Pass	83%	68.6	Fail
	Dislocated Workers	82%	89%	Pass	83%	93%	Pass	86%	87.9	Pass	87%	72.9	Fail
Retention Rate	Adults	82%	86%	Pass	83%	89%	Pass	84%	85.5	Pass	89%	89	Pass
	Dislocated Workers	82%	88%	Pass	83%	96%	Pass	88%	88.1	Pass	82%	92.7	Pass
Earnings Change	Adults	3100	8360	Pass	3200	51781	Pass	3968	4435	Pass	4166	12311.5	Pass
Earnings Replacement Rate	Dislocated Workers	88	144	Pass	86	159	Pass	86%	114.9	Pass	878	12060.7	Pass
Credential Attainment Rate	Adults	62%	73%	Pass	63%	73%	Pass	64%	66.7%	Pass	65%	40.7	Fail
	Dislocated Workers	62%	70%S	Pass	63%	87%	Pass	64%	68.8%	Pass	65%	37.8	Fail
Job Seeker Entered Employment Rate	Wagner-Peyser Job Seeker	NA	NA	NA	NA	NA	NA		65			70	
Employment Retention Rate	Wagner-Peyser	NA	NA	NA	NA	NA	NA		81			82	

When measures are not met, the Eastern WIB provides technical assistance to the service provider. They also ask the service provider to complete a root cause analysis of what system delivery flaw has led to the failed measure, and to create a corrective action plan to address that root cause.

The Eastern WIB made a concentrated decision to serve all customers in need of services. This is evidenced by the numbers of customers served each year through the Centers and registered and participating in WIA Youth, Adult and Dislocated services.

The choice to serve all customers in need is also evidenced at the EWIB decision to serve those impacted by Hurricanes Katrina and Rita, even when the individuals do not currently reside in the EWIB area. This choice to serve all individuals in need has impacted the performance measures negatively. However, the EWIB stands by its decision to serve the customers in need, instead of letting the performance measures dictate which and how many of the customers will be served. The EWIB will continue to improve its service delivery processes so that it will be able to maintain its policy to serve all customers in need, while working to improve the outcomes.

Continued technical assistance to service provider, assistance with continuous improvement efforts, gathering and distributing best and promising practices from throughout the nation to the service providers are some of the strategies the EWIB is implementing to exceed standards, improve services and increase market penetration.

The Eastern WIB has defined self-sufficient as “individuals with living wage jobs (total household income above \$12.50 per hour)) and **adaptable, marketable skills** that enable them to find new jobs when necessary.”

To reach its vision for the community “*To become a region with a world class workforce*” required the EWIB to establish a local definition that would ensure all individuals develop adaptable, marketable skills. Having the skills necessary to find and maintain jobs will ensure the area is prepared for the work of today and the future.

Eastern Workforce Investment Board will ensure that supportive services are provided to individuals who:

- Meet the eligibility requirements for WIA;
 - This criterion includes the Local Priority Groups as determined by the Board which can be found in the current Adult and Dislocated Worker Service Delivery Policy and the Youth Services Delivery Policy.
- Are enrolled and actively participating in Core, Intensive and/or Training Services;
- Have been determined after case management to need supportive services to complete training or obtain/ retain employment; and
- Are unable to obtain the supportive service from another source or require WIA assistance in addition to other programs providing such service.

The EWIB has established the following limits on the provision of supportive services:

- The supportive service
 - must be necessary to the customer becoming employed and/or completing a credential,
 - cannot be accessed through any other means, and,
 - must not be prohibited by the ***Workforce Investment Act, 20 CFR 652, et al. Workforce Investment Act; Final Rules***, the OMB circulars, Department of Labor policies, EWIB policies or contractor policies.

EWIB will not authorize payments for legal fines or fees, excise tax, car payments, car purchases, or medical care. While some medical *services* can be paid for with WIA funds, ***on-going medical care*** can usually be provided at little or no cost to the customer through the Department of Health or the Department of Human Services. Even though there are some limitations of expenditures, extenuating circumstances do arise for the customer and will be handled on a case by case basis. Any limitations are based on the prohibition of these payments by OMB circulars.

Exceptions to limitations of service are evaluated on a case-by-case basis and approved by WIB staff on behalf of the Board. Exceptions to EWIB's Supportive Services policy can also be evaluated by a case by case basis by the One Stop Operator Consortium in order to grant exceptions to Board policies.

Needs Related payments are not presently allowed as a service to WIA participants. In the event the service is deemed a viable service a policy is in place and will be ready for implementation.

Eastern Workforce Investment Board will ensure that follow-up services are made available as appropriate to WIA Adult and Dislocated Worker-registered individuals who are placed in unsubsidized employment for a minimum of a 12-month period following the first day of employment through the One-Stop System.

Follow-up Services are provided to ensure customers are transitioning smoothly into the workplace and to provide support, and gain additional skills as needed so customers can remain employed. It is very important that workforce center staff maintains contact with employed customers after termination of services to meet performance measures such as retention, earning gains, and wage replacement as appropriate.

Follow-up services must be made available to terminated participants that previously received Assisted Core, Intensive, and/or Training Service in WIA activities who are placed in unsubsidized employment. Follow-up services must be available for not less than 12 months after the first day of unsubsidized employment, as appropriate.

The intensity of appropriate follow-up services may vary among different participants and not all of the adults and dislocated workers who are registered and placed into unsubsidized employment will need or want such services. Participants who have multiple employment barriers and limited work histories may be in need of significant follow-up services to ensure long-term success in the labor market.

Follow-up services may include, but are not limited to: additional career planning and counseling; contact with the participant's employer, including assistance with work-related issues; peer support groups; information about additional educational opportunities; and referral to supportive services available in the community

Newspaper articles, W.A.R.N. notices, Trade Act applications are shared with the staff as a general announcement of plant closure.

As with the other customers served with WIA funds, self-employed individuals who become unemployed as a result of general economic conditions, will receive services tailored to their needs. As they enter the system, each will be assessed and evaluated. If found in need of services beyond core, they will be further assessed and work with a case manager to develop a plan of services that will provide activities that will lead to their self-sufficiency. These services may include one or more intensive and/or training activities.

Since eligibility for adult services is not contingent on income, it may become necessary to serve customers based on need and priority when funding is limited. Such priority shall be given as follows:

- 1 Individuals who meet one of the eligibility criteria and who are TANF recipients or non-custodial parents of TANF recipients who are not eligible to receive services under the program or the TANF Employment programs, or when needed services are not otherwise available.
- 2 Individuals who are unemployed and unable to obtain employment through core services and who have been identified through one of the “Intensive Service Indicators” to be in need of Intensive Services to reach their employment goal and are low income based on the criteria established in WIA.
- 3 Individuals who are employed, but who have been identified through one of the “Intensive Service Indicators” and noted in case notes to be in need of Intensive Services to reach their employment goal that allows for self-sufficiency.
- 4 Individuals who are willing to be employed in any of the labor markets in the Eastern Workforce Investment Area.

All citizens will be eligible for core services. Core services include information distribution, employment statistics, training provider performance, one stop delivery system performance, filing UI, resource room usage, initial plan development, workshops/job clubs, eligibility (WIA Title I-B and other employment and training programs), outreach, intake, orientation and initial assessment which includes skills, abilities, aptitudes and support service needs.

The above services may be accessed through self service and do not require registration into WIA. If these services do not lead to customer self-sufficiency, they may receive the following staff assisted services job search, placement assistance, career counseling, job referrals, job development and workshops and job clubs.

To receive these services, the individual must be registered for WIA Dislocated Worker or Adult programs. Some individuals may require additional services that are more intensive. They include career planning, case management, short term pre-vocational classes, adult basic education/workplace literacy, relocation assistance, internships, work experience, comprehensive specialized assessment (diagnostic testing and interviewing), individual employment plan development and counseling (individual and group).

Although the above services are very beneficial to assist individuals to employment and self-sufficiency, some individuals may need training services to get and receive jobs. In order to receive training services, if there is a lack of funding, the priority of service may be implemented.

As with the other customers served with WIA funds, displaced homemakers and disadvantaged individuals, will receive services tailored to their needs. As they enter the system, each will be assessed and evaluated. If found in need of services beyond core, they will be further assessed and work with a case manager to develop a plan of services that will provide activities that will lead to their self-sufficiency. These services may include one or more intensive and/or training activities.

Although there are currently no special projects for non-traditional training and employment, each customer will be able to receive, if deemed appropriate to address their specific needs and interested, opportunities to pursue non-traditional training and employment. As with all services, these services will be provided based upon a customer assessment and the development of a service plan.

The case manager and the customer must work together in determining and developing a comprehensive plan to achieving employment goals that are suitable for the customer's interests and abilities. As an intensive service, an Individual Employment Plan (IEP) must be completed before a customer can receive services. The sequence of services delivered through the development of the IEP must determine all factors of a customer's need and barriers in order to achieve his/her employment goals. The customer will have conducted an assessment, established verifiable occupational clusters, developed an employment plan directed toward achieving economical self-sufficiency, and concurred with this plan with a signature. Customers will meet with other partners in order to assure all available resources will be utilized by the customer to assist him/her with attaining and maintaining economical self-sufficiency. The IEP will include all services from One-Stop partners and other community funding sources to which the individual may be referred or seek themselves

Training services that will be available through the Workforce Development system include: occupational skills training; on the job training; combined workplace/co-op education; private sector training; skill upgrade/retraining; entrepreneurial; job readiness; adult education and literacy combined with other training; and customized training. These services will be available to all customers (including those impacted by Katrina and/or are eligible for Trade Act funds) who meet the criteria for entry into the training services category.

The following are services and documents that are required in order for the case manager to make an appropriate determination that Training Services should be provided. Services shall be documented in the IEP and appropriate support documentation shall be provided in the case file.

- Development of IEP
- Documented Basic Skills assessment or academic level
- Documentation of services provided, progress and justification for training (rationale)
- Completion of Financial Aid Application, award letter from selected training provider, Federal Financial Aid Student Assistance Report (SAR) or self- certification.

RAPID RESPONSE

When WARN notices are issued, the state is notified and state staff work with the business to provide rapid response services to determine what services might assist them in averting the layoff or closure. If the closure or layoff cannot be averted, state staff work with the business to establish a series of meetings with the impacted workers to explain services available to them through the workforce development system. Various partner staff attend the meetings together to fully explain all the available services from the entire system. Therefore, the services are provided in a team approach. This team may include not only the partners included within the mandated partner list within the WIA

law, but often times will also include representatives from banks, health insurance companies, food pantries, etc.

Part of the information distributed at the initial meetings will be information about the targeted industries for the area, the skills required to pursue jobs within those industries, training institutions that provide training in those skills, and the steps required to access the training. Each individual interested in training within the targeted industries will be assessed and a service plan developed to identify the activities and services they will receive from the workforce development system to prepare them for work with a new company.

BUSINESS SERVICES

The EWIB continues to meet with employers by industry clusters to collect specific data about skill requirements as well as business activities and services needs. Information collected from these meetings also will be utilized for collateral needs identification that may cross industry boundaries.

Employment Services representatives have been an integral part of the Business Services Team from its inception. In LMA #22 they serve as industry broker agents to the business community.

Employer workshops have been conducted periodically. This information is a part of the general publication materials distributed on a regular basis during industry site visits and at other outreach endeavors.

The local board created a board staff position in 2004 for Business Services Coordinator. This staff member is responsible for the education, training, coordination and outreach to the business community and works with all seven counties and the service delivery staff.

The Oversight Committee is addressing the system oversight and ways other board committees interact with some of the items such as education, business development, system wide service delivery. All strategies are viewed through the economic development lens to insure the region's plans and activities are geared at raising the economic level of the region and its local communities.

COORDINATION AND INTEGRATION OF SERVICES

EWIB shall ensure that one-stop customers receive core, intensive, and training services in a systematic manner based on individual evaluation and assessment. Services will be provided in sequence based on individual progress and availability of services. Services will be provided in accordance with local, state, and federal guidelines.

Core Services: One of the principles of the WIA is the universal access to core services which is achieved through close integration of services provided Wagner- Peyser, WIA adult and dislocated worker programs and other partners in the One-Stop center and system. Core Services are divided further into self-service and staff assisted service referred to as, **assisted core services**, which are services that require **significant** one-on-one staff assistance and WIA eligibility/registration.

Partner agencies will work together to determine which agencies have funding sources allowing them to provide core services, and then negotiate with the other partner agencies able to offer that service to determine what role each agency will play in providing it. When a customer is determined to need staff assistance for the core service(s), agencies that need to ensure customer eligibility to provide that staff assistance will be notified so that eligibility screening can occur. Any agency that does not require that customer's meet eligibility requirements in order to provide the core services will be able to offer those services to any customer needing them

Intensive Services: Intensive Services are available to adults and dislocated workers who have been determined eligible for WIA services and WIA registration is complete. However, Intensive Services may be provided by non- WIA sources. In such instances, customers would not have to be eligible or WIA registered, referral to appropriate partners can be made using the System Referral Form.

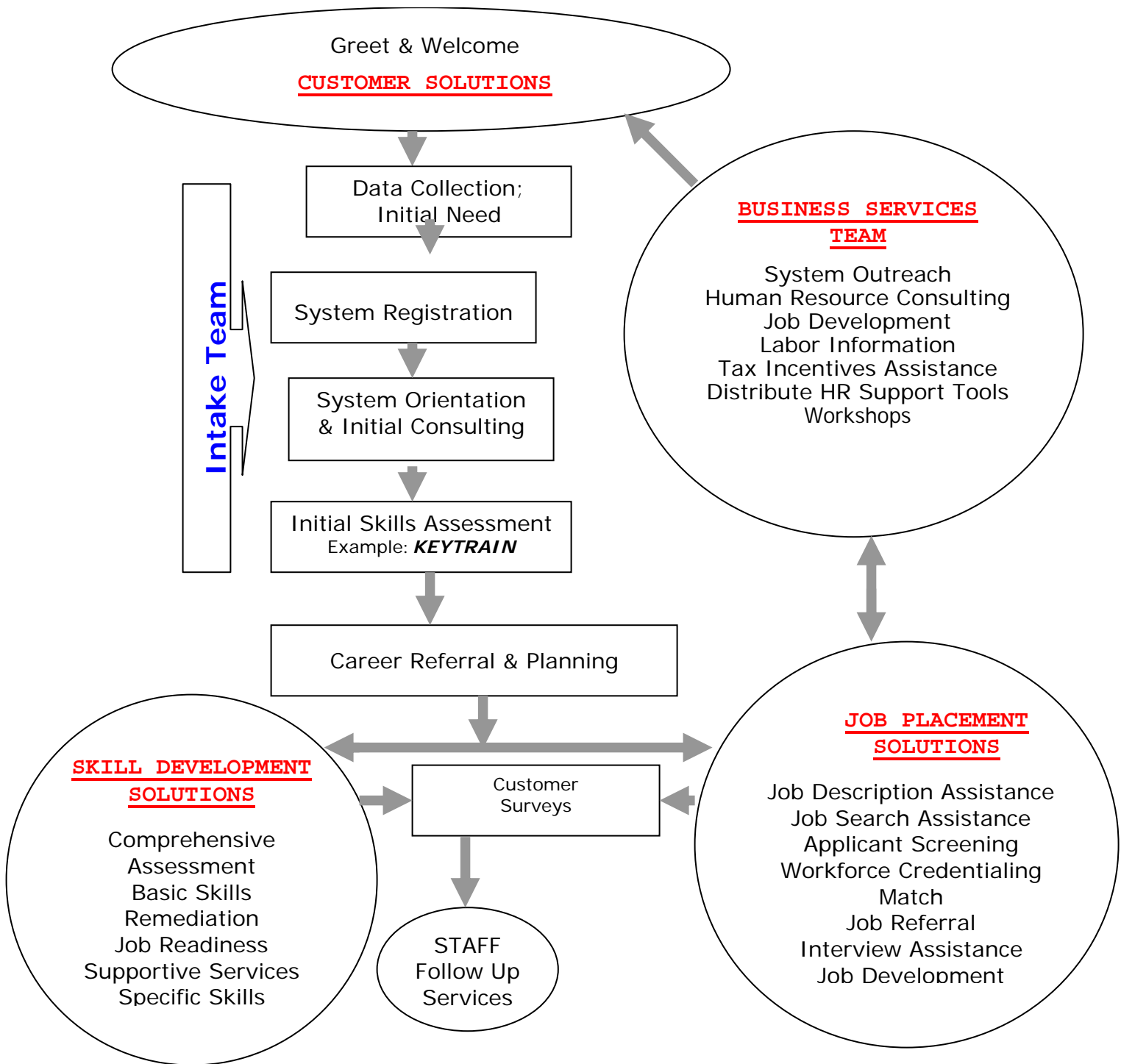
Training Services: Training Services may be made available to under-employed (as defined by local policy), and unemployed adults and dislocated workers who are unable to achieve their employment goal through intensive services. These individuals will be required to apply for financial aid (PELL, OTAG, etc.) and other assistance available (scholarships, etc) excluding student loans before an Individual Training Account (ITA) is established. When an ITA is established, Intensive Service Contractor must ensure that there is a mechanism in place to determine the proper mix of other financial assistance (when available) and WIA funds.

Partner agencies will share with each other the intensive services they are able to provide, and, the customer populations to whom they are able to provide the service. Partner agencies will continue to update each other when their funding sources change what services they are able to provide, or what populations they are able to serve.

A common referral process will be established to simplify the approach to ensuring customers receive the services they need.

EWIB will ensure service integration in the local Workforce Centers by making sure that WIA and ES function by service rather than program. WIA and ES staff will cross train. The Board has issued a new RFP which contains a new statement of work and common performance measures that will encourage the providers to focus more on providing core and intensive services. This new approach will allow both WIA and ES staff to provide functional services to the customers. The flow will follow the emerging service paradigm. (See Chart B on the following page.) We will use this design in our larger centers first. The satellite centers are already somewhat integrated.

CHART B: Integrated Customer Flow for Demand-Driven, Skill-Focused Workforce Centers



EWIB will include business customers as well as job seekers and will offer flexible hours at the workforce centers. The centers will be evaluated to ensure that self-service, informational, and staff assisted core services are readily available.

The EWIB will conduct employer and job seeker surveys, evaluate customer flow and performance of all partners and conduct focus groups. EWIB will evaluate the Workforce facilities for possible reorganization and/or redesign. EWIB will also create greater access points through the use of libraries, faith based organizations, and kiosks at key areas within the community.

The local board will be responsible for ensuring quality services are provided for the customers through, at a minimum, integrated WIA/ES system services. The WIB will do this by:

- setting key expectations for integration,
- communicating the expectations to the partner agencies,
- evaluating Workforce Center facilities against those expectations,
- making recommendations that will enhance service integration, meet customer needs, and foster ownership of the Workforce Development System by all partners, and,
- resolving system and program partner issues brought to their attention by the regional management team.

The WIB will set the expectations at least annually through the One Stop/System Operator agreement signed by both the WIB and the selected Operator. These expectations for the system include overall system requirements and standards (user-friendly, easy to access, integrated, office layout, etc.) and performance/ outcome measures and levels. The WIB will assist the Operator in communicating these expectations through meetings, publications and policies. The WIB will do a desk top review of the system's ability to meet the prescribed expectations monthly, with a quarterly review of the performance outcomes and financial reports. These reviews will include reports on customer feedback that the Operator collects, analyzes and assists the partners to address. Annually, the WIB will conduct an on-site evaluation of each One Stop Center, and the results of the overall system's integration of services. Any issues found will be communicated to the system partners and the Operator. The partners/Operator will complete and submit a corrective action plan to be approved by the WIB. The WIB will follow up to determine if the action plan has been implemented and corrected the issue.

The WIB will also establish a One Stop chartering and recertification process. They will use this process to continually challenge the One Stops to continuously grow and develop. Any One Stop that does not meet the chartering requirements will be placed on probation, or, have its charter revoked.

EWIB will empower the One-Stop System Operator by assisting with convening of partners to develop an integrated service delivery strategy. The One-Stop Operator will work closely with the One-Stop Center Manager. The One-Stop Center Manager will be selected from the System Management Team in agreement with the Board.

Once the WIB has set the expectations for the system, it will request a business plan for each Workforce Center. The business plan(s) will include:

- business overview – including the purpose/mission of the One Stop system,
- what products and services will be provided within each Center.
- system and Center marketing plan

- system and Center performance outcomes
- system and Center management structure
- system and Center organizational structure
- Center operational plan, and,
- Center financial plan

The business plans will be for a two-year period. They will be submitted to and reviewed by the WIB. The approved business plan will be a key element of the Once Stop chartering process.

DEMAND OCCUPATIONS, ELIGIBLE TRAINING PROVIDERS, INDIVIDUAL TRAINING ACCOUNTS

The Governor designated the Oklahoma Service Link Eligible Training Provider System (OSL/ETPS) for management of WIA eligible training providers. Eastern Workforce Investment Board (EWIB) will be responsible for providing materials and guidance to training providers in the area regarding the use of the online system. Providers interested in having programs certified and made eligible to receive funds available under section 133(b) of the Workforce Investment Act, will enter complete and accurate information regarding their organization and training programs and submit it to designated EWIB staff to be processed and submitted to the WIB for approval. The request will then be submitted to OESC Employment and Training Division, the designated state agency, for validation and approval or disapproval. If approved, it will be formally included as approved training providers on the State Eligible Training Provider List.

The eligible training provider list (ETPL) includes:

1. Those training providers and community-based organizations with whom EWIB has written contracts for services as exceptions to ITA's such as those for On-Job-Training or customized training as specified in 20 CFR 663.430 (a)(2) and (a)(3).
2. Those training providers who apply and are selected to be placed on the List so that WIA customers may use ITAs to choose appropriate training, specifically. Providers of training are identified within three categories:
 - a. Postsecondary institutions that are eligible to receive federal student aid funds (Title IV of the Higher Education Act of 1965) and provide programs that lead to an associate degree, Baccalaureate degree, or certification, must submit an application, listing all programs seeking initial eligibility. Non-credit courses may be included in these programs if they are critical in attaining a certificate or degree, or if they assist in gaining employment.
 - b. Training providers that provide apprenticeship programs registered under the National Apprenticeship Act must submit an application, listing all programs seeking initial eligibility to the WIB in cases where the provider wishes to deliver training services.
 - c. Another public or private provider of a program of training services.

To be eligible as a service provider, institutions categorized as either (a) or (b) above must submit an application to EWIB via the Oklahoma Service Link Eligible Training Provider System. The application must include a description of each program or training service for which the provider is requesting designation as an approved program. The institution does not have to provide performance information on each program of training services if that information is not readily available.

To be initially eligible as a training services provider, institutions categorized as c above must submit an application to the WIB via the Oklahoma Service Link Eligible Training Provider System www.OklahomaJobLink containing a description of each program of training for which the provider is seeking designation as an approved program. If the provider is currently providing the program of training on the date of application, the service provider must include performance information and program costs in the application. The program must meet appropriate levels of performance as approved by the State and the WIB.

If an institution categorized as (a) requests approval of a program of training that does not lead to an associate degree, baccalaureate degree, or certificate; or if an institution requests approval of an apprenticeship program that is not registered under the National Apprenticeship Act, the institution must submit performance information and must meet appropriate performance levels. If the provider is currently providing the program of training on the date of application, the service provider must include performance information and program costs in the application. Approved appropriate performance levels must be met.

If the institution categorized as (c) does not currently provide the program of training on the date of application, the provider is not required to include performance information and is not required, for that program, to meet appropriate levels of performance for initial eligibility. All approved programs of training must be on the demand occupations list for the Area. Providers are not eligible to receive WIA training funds under title I of WIA until they have been added to the State eligible training provider list by the designated state agency.

A provider may be determined to be initially eligible for a period of time that exceeds one year. June 30th of each year is the date all eligible providers must submit performance information unless a deadline waiver is granted by the state upon written request by the WIB. In the determination of initial eligibility, a provider that is determined to be initially eligible between January 1 and June 30 will be granted an exemption from the June 30 reporting requirement for the initial year only.

Changes in current and future workforce issues and goals will be implemented as state and local economic development organization data determines the need to change. Such changes will then affect the changes that will occur in the eligible training provider list and the individual training account policies and procedures will be updated to accommodate the changes. Service providers will be apprised of the changes and will be instructed to change program strategies accordingly.

EWIB service provider(s) operate WIA programs on a multi-county basis and coordination and linkages with targeted industries are critical in the counties. EWIB relies heavily on statewide labor market information for local demand occupations and coordinates with State Economic Development agencies in the dissemination of labor market information to its service providers.

Pertinent and critical labor market information and demand occupation data are and will continue to be disseminated to staff and service providers via email, directives, EWIB website, and other means necessary as it is received.

Individual Training Accounts are established on behalf of an eligible customer who has received at least one intensive service. ITAs are designed to be flexible and facilitate the purchase of a training program that best meets the customer's needs and interests. Training services will be provided in a manner that maximizes the customer's choice in the selection of an eligible service provider and program. Customers must be enrolled in board approved demand occupational or skills training by a state approved training provider.

Case managers will provide the customer a copy of the board approved demand occupations and board approved demand skills. Currently, EWIB has adopted the demand occupation and skills list that was determined by the Oklahoma Department of Commerce. If the customer chooses training in a

non-demand occupation, the Executive Committee of the Board will consider individual waiver requests on a case by case basis dependent on the needs and interests of the customer on behalf of the full Board.

Case managers will provide the customer with a copy of the State-Approved Training Providers List as published by the Employment and Training Division of the Oklahoma Employment Security Commission. Case managers will coordinate with the Financial Aid offices of the training institutions to ensure the customer is receiving assistance in applying for Higher Education Act Title IV funds and other forms of financial aid. A copy of the completed FAFSA form must be placed in the customer file for each year the customer is receiving WIA funds for training. Case managers also ensure the customer receives student loan counseling and is aware that (s)he is not required to incur any debt in order to participate in Workforce Oklahoma programs. It is the customer's choice if (s)he wishes to incur student loan debt after receiving counseling. Case managers note all counseling regarding financial aid in case notes. EWIB Accounting Policies address the billing and payment structure for Training Vouchers and the coordination of financial aid payments and Title I funding between EWIB and the training institutions.

Eastern Workforce Investment Board administers two types of Individual Training Accounts. WIA allows the local workforce investment board to limit the dollar amount and/or duration of training a customer may receive. WIA based Individual Training Accounts limitations are set by the Board annually. The EWIB imposed-limits are established at the first board meeting of each program year in order to maximize customer choice in the selection of an eligible training provider. Trade Adjustment Act (TAA) Individual Training Accounts limitations are set by the State's TAA Coordinator. The current limits for both the WIA ITA limits (set by EWIB) and the TAA ITA limits (set by the State TAA Coordinator) are a maximum of \$8500 for total training expenses with a maximum of two years of support for each funding source.

The limits are for training related costs including but not limited to tuition, fees, books, uniforms, equipment, and other miscellaneous required items necessary to complete the selected course of study. This limit may be waived under extenuating circumstances as determined by the EWIB Staff on behalf of the Eastern Workforce Investment Board

CUSTOMIZED TRAINING/ON-THE-JOB TRAINING (OJT)

The process for reviewing local OJT policies will occur as directives and guidance are received from the Department of Labor or the State and will be reviewed by EWIB staff on behalf of the WIB. After review, any changes required to the policies will be reviewed by the Executive Committee, who will bring the final recommendations to the full Board for approval.

Contracts must be reviewed at least once during the contract period for performance and compliance. During a monitoring visit, the person conducting the review will meet with the OJT employer and their employee to review participant's work performance and/or training progress.

Service providers will be required to monitor the training process and the trainee's progress; the time and attendance reports and payroll records; and, compliance with contract terms of each OJT monthly.

When monitoring the training process and trainee's progress, the service provider will verify:

- the participant is receiving the training designated within the contract and at the wages in the agreement,
- the participant is not required to engage in activities prohibited by WIA, and,

- that skills and training objectives are being met.

When monitoring the time and attendance reports and payroll records, the monitor will review employer records to assure that the participant is receiving proper wages and that the employer is withholding taxes and paying workers compensation (or equivalent) insurance. When reviewing the compliance with the contract terms, the monitor will ensure compliance and resolve any issues or problems that may have arisen with the training provider and/or participant.

Discrepancies found will be reported to the EWIB monitor and a plan of correction will be developed. Any areas requiring corrective actions will be followed closely and compliance will be assured before final payment is made on the OJT contract.

EWIB monitoring will be conducted to determine if service providers are monitoring and performing oversight of the contract on a monthly basis as required. OJT monitoring activities will be conducted according to the requirements contained in EWIB Monitoring Procedures.

TRADE ACT STRATEGY

Since the Eastern Workforce Board does not receive any funds to directly administer Trade Act programs but individuals are mandated by TEG 11-02 to receive these services through the One-Stop Centers, all Trade Act customers are co-enrolled in Dislocated Worker programs and subject to the same policies and procedures as Dislocated Workers. The EWIB policies and procedures are already aligned to provide seamless services through the integrated service delivery model.

Each TAA customer must have an ITA established through EWIB in order to receive training services. TAA funds are considered to be another funding source to be used in conjunction with WIA funds to maximize customer services.

WIA I-B AND TITLE III PY 05 PERFORMANCE AND SYSTEM INDICATORS

Table Q on the following page outlines the PY 2007 and PY 2008 negotiated performance standards.

TABLE Q: EWIB PARTICIPANT PERFORMANCE LEVELS
(Oklahoma State Employment Security Commission 2007)

	PY07 Negotiated Level	PY08 Negotiated Level
Adult/Wagner-Peyser		
Entered Employment	70%	71%
Employment Retention	82%	83%
Average Earnings	10,900	11,200
Dislocated Worker		
Entered Employment	75%	76%
Employment Retention	89%	90%
Average Earnings	12,800	12,600
Youth		
Placement in Education or Employment	60%	61.5%
Attainment of a Degree or Certificate	42%	89%
Literacy & Numeracy Gains	30%	31%

All new performance measures are communicated to the EWIB staff, service providers and their staff, through technical assistance meetings, email, the EWIB website and conversations with staff. In addition, prior to signing contracts, each service provider negotiates their performance in a manner to assist the Eastern workforce area to reach those negotiated with the state. Partners and stakeholders are notified via meetings and the EWIB website.

The newly negotiated performance levels are communicated to the local service providers. Each service provider is required to create programs, services and processes that will ensure the measures are met and/or exceeded. The program design is negotiated with the EWIB and reflected within the service provider contract. If a service provider identifies an EWIB policy and/or procedure that will negatively impact the agency in meeting the performance measures within the contract, the service provider can address this with the EWIB staff to ensure the policy is change or eliminated.

When measures are not met, the Eastern WIB first provides technical assistance to the service provider. They also ask the service provider to complete a root cause analysis of what system delivery flaw has led to the failed measure, and to create a corrective action plan to address that root cause.

The Eastern WIB believes that it is important to evaluate, along with the service providers, the performance at least monthly, to identify any processes that need to be corrected. The EWIB also believes that the more business is involved with the workforce development system, the more

effectively businesses will be served, and the higher the performance measures will be. Therefore, they have designed strategies to assist targeted industries. The strategies include determining the skill requirements for the targeted industries, assisting individuals to gain those skills and an effective job matching process to ensure those skilled individuals are matched with the key high paying job openings. This will ensure that the job seekers will have high skill and high wage jobs to enter after participating in WIA services.

SYSTEM INDICATORS

Previously the EWIB has not reviewed the performance measures of the partners. Now that the WIB understands its role in creating a local workforce development system, it has assigned the System Oversight Committee the responsibility to begin to address how to provide support and guidance to the partner agencies through review of their performance measures, or, creating system-wide performance measures and standards.

The EWIB has assigned some of the goals established at its strategic planning session to the Business Services Team. Therefore, the EWIB will be monitoring how effectively the Business Services Team meets those goals. In addition, the EWIB will be establishing performance measures this year for the Business Services Team as it relates to their daily operations outcomes and the service provision to Targeted Industries.

LOCAL MONITORING

The oversight activities of the Eastern Workforce Investment Board, Inc. are based on the requirements set forth in The Workforce Investment Act of 1998 and its regulations. It is designed to determine that expenditures have been made against the cost categories and within the cost limitations specified in the Act and the regulations in this part; determine whether or not there is compliance with other provisions of the Act and the WIA regulations and other applicable laws and regulations; review performance against the established measures; and, provide technical assistance as necessary and appropriate.

The monitoring/continuous improvement will focus on local service providers programs for youth, local employment and training activities for adults and dislocated workers, and, the one-stop delivery system in the local workforce area.

The Eastern WIB's Monitoring/Quality Assurance unit will perform the needed duties in accordance with federal, state and local regulations, policies and procedures and will be accountable to the Executive Director and the Eastern Workforce Investment Board. The Monitoring/Quality Assurance unit will have access to all plans, contracts, grants, sub grants, worksite agreements, records and files. The unit will be provided with all pertinent work papers, correspondence and reports and will be placed on routing lists to receive copies of all federal, state and local regulations, issuances, policies, procedures and memos pertaining to WIA.

The Monitoring/Quality Assurance unit will conduct monitoring services for both the financial and operational components of all service providers and sub-recipients of the Eastern Workforce Investment Board. For each of the sub-contracts, at a minimum, the required three methods of review will be performed. Those areas include: desktop reviews of existing data, on-site record reviews of both financial and participant records, and observation and discussion with contractor management staff.

Financial Reviews- 29 CFR Part 95.21(b) requires that all service providers' financial management systems adhere to the following set of standards:

- *Financial Reporting*-the scope of monitoring will determine whether the financial results of the activities were accurate, current, and complete. All costs will be reviewed to determine if they are allowable, and are able to be traced to accounting records.
- *Accounting Records*-Records will be reviewed to determine if they are maintained according to Generally Accepted Accounting Principles and are utilizing the accrual basis of accounting.
- *Internal Control*-Service providers' systems will be reviewed to ensure that there is effective control and accountability for the fund that are being administered.
- *Budget Control*-Actual expenditures will be compared with approved budgets.
- *Allowable Costs*-Costs charged to the service providers will be reviewed to determine allowability, reasonableness, and allocability according to budgets, grants, and applicable OMB cost principles.
- *Source Documentation*-Canceled checks, invoices, purchases orders, etc will be reviewed to determine whether costs charged to the service providers are indeed allowable and allocable.
- *Cash Management*-Cash received by service providers will be reviewed to ensure that cash on hand is minimized.

Program Systems Review-At a minimum, the following systems will be monitored for compliance with applicable OMB Circulars, WIA Law and Regulations, and EWIB Operational Policies.

- Eligibility System-for WIA Adults, Youth, and Dislocated Workers
- Management Information System
- Individual Training Account System
- Equal Opportunity/Non Discrimination/ADA/Grievance Systems
- Workforce Investment Act Requirements
- Required Youth Elements

Monitoring/Compliance scheduling will ensure equitable distribution of oversight activities with those areas most in need of review. Focus will primarily consist of programmatic and fiscal compliance; identification of program weaknesses and successes; recommendations; and corrective action

The scheduling process will include periodic meetings with the Executive Director. The meetings will outline the planning for the month regarding issues, problem areas needing special attention, recommendations and a general discussion of the unit plans for the timeframe.

The oversight/monitoring activities will function as an assessment/compliance evaluation of the WIA programmatic, administrative, and fiscal activities and will serve as a tool for continuous improvement and enhancement of services and activities carried out under the Workforce Investment Act.

Service provider contracts will be reviewed on a quarterly basis for compliance and performance based on benchmarks established in each contract. Reviews will be done as specified in each contract. The purpose of this part of the review is to assess local policies and procedures and to determine whether services are being provided that are relevant to the participants' needs. The items identified

above will be monitored through the review of the in-house Policies and Procedures manuals in comparison for consistency with federal and state requirements. This monitoring focuses on the project's day-to-day operational policies.

For each service provider, the monitoring information will be captured within a monitoring report. The report will include the logistics of the monitoring approach, any best or promising practices, any findings, and recommendations for improvements. The reports will be shared with the service provider, who will have a limited time to submit a response to the report, with a corrective action plan to address the findings. At the next monitoring visit, the monitor will review to see if these corrective action plans have been implemented.

EWIB staff will review each monitoring report and will require the service provider to develop corrective action plans for significant findings. The implementation of the plans will be monitored during future monitoring visits. During the middle of a contract year, if the monitoring findings are severe, and/or if the service provider does not develop and/or implement a corrective action plan, the ad hoc Contract Review Committee will review the information and determine if the contract with that provider will be terminated. The Committee will bring forward to the full WIB a recommendation for any contract to be terminated.

At least annually EWIB's ad hoc Contract Review will review the monitoring reports for each service provider. This information will be utilized to determine if the service provider contracts will be renewed/extended for future years, and/or prior to awarding a new contract with that service provider.

The monitor will also review the collective monitoring reports for all service providers to determine if there are any systemic problems due to ineffective WIB policies. If found, the monitoring unit will bring the information to the Executive Director, who will then ensure recommendations for revised policies are brought to the EWIB for approval.

Local Plan Amendment to Allow the Transfer of 25% of Formula Funds for Local Activities

Request

To meet the demands of employers, incumbent workers, job seekers, and youth, the Eastern Workforce Investment Board (EWIB) is seeking to use up to 25% of formula funds for Local Activity Funds as allowable activities allowed under the uses of Statewide Activity Funds authorized by the Workforce Investment Act. This request is being proposed as a local plan amendment submitted to the Governor of Oklahoma in accordance to the State of Oklahoma Strategic Two-Year Plan for Workforce Investment Plan for July 1, 2007 to June 30, 2009.

Description of the individuals affected by the waiver

The waiver will benefit employers, incumbent workers, job seekers, youth, service providers, and One Stop center staff. The flexibility of these funds authorized under this waiver encourages increased existing services and become more responsive and innovative to meet existing and new customers' needs.

State or local statutory and regulatory barriers to implementation

There are no state or local statutory or regulatory barriers to implementing the proposed waiver. Upon notification of approval of the waiver request, EWIB policy will be amended to comply with the terms of the waiver, and applicable policies and procedures will be developed and issued to the one stop centers and service providers.

Goals to be achieved by the Waiver

This waiver is instrumental as a component in Oklahoma's workforce strategy, which is consistent with national policy direction, to develop a more integrated, efficient, and effective workforce system. The EWIB identified several challenges that have emerged as a result of the changing demographics including a declining income for the population within the area; shrinking middle class with increasing lower and upper classes; aging population/ workforce, and increase in diversity/ minority population.

The EWIB is interested in growing the wealth of the Eastern Workforce Investment Area. This will address declining income issues, as well as begin to increase the lower, middle and upper class. With an aging population, some industries find themselves in a shortage of workers as the baby boomers retire and the emerging workforce and children do not meet the need in numbers or skill levels. The increase in the minority population may ease the impact, as long as the minorities possess the skills required for the jobs. With potential language barriers, or cultural differences, the employers may need assistance with adjusting to a diverse labor force.

The transfer of funds will allow the EWIB to implement state-level initiatives at the local level. These initiatives include supplementing or expanding the services and activities of the regional Workforce Oklahoma Centers; locally directed and funded incumbent worker activities that will improve relations between businesses and EWIB;

improving the operations of the regional business services team; improved services directed towards job retention and layoff aversion; and, expanded intensive and training services for adult and dislocated workers.

Anticipated services to be offered:

- Increased employer/board collaboration to address industry needs and worker training aligned with current EWIB WIRED initiatives to promote Certified Ready Communities and a WorkKeys certified workforce.
- Enhanced employment, re-employment, and job retention for job seekers and workers by providing education, training, and other services necessary to assist individuals in moving along the wage and skill continuum
- Enhanced effective access of individuals and businesses to training and employment services that meet regional workforce needs
- Contribute to maintaining and increasing the availability of quality jobs in the Eastern region.

Specific percentages of formula funds to be designated as Local Activity Funds

- Twenty-five percent (25%) of Adult formula funds
- Twenty-five percent (25%) of Dislocated Worker formula funds
- Twenty-five percent (25%) of Youth formula funds

EWIB Assurances and Acknowledgments

The Eastern Workforce Investment Board will continue to ensure that all services required of the Workforce Investment Act are provided throughout the region. The Eastern Workforce Investment Board will ensure that all expenditure benchmarks and performance measures associated with all Workforce Investment Act programs will continue to be met. EWIB policy, procedures and technical assistance will be provided on a continuing basis to service providers to ensure quality services and programs for employers and job seekers.

Outcomes/Benefits

The most immediate outcome of the waiver will be to increase the numbers of incumbent workers who would not otherwise be trained. That impact will be felt widely across the state. This waiver will benefit local WIBs, employers, job seekers, service providers, and Oklahoma communities. The following are specific impacts of the proposed waiver:

- Program participants will benefit because of added flexibility to design programs based on regional needs and priorities
- More customers will have access to essential services
- EWIB will be able to provide incumbent worker training and other layoff aversion activities.
- By increasing the skill base of employees in local business and industry, EWIB's employer community can strengthen their standing in competitive markets, leading to a stronger regional economy.

Monitoring/Evaluation Process

The Oklahoma Employment Security Commission (OESC) is the State administrative entity for the Workforce Investment Act and will monitor service delivery and outcomes under the waiver as required by an annual on-site review and issue a report to the Oklahoma Department of Commerce.

Other comments provided

Consistent with the general waiver request, the EWIB is adhering to publication requirements to ensure the broadest participation possible. This includes informing appropriate partners and interested parties such as labor and faith-based and community-based organizations. The plan amendment will include an acknowledgement from the WIB that all performance targets and expenditure benchmarks will be met. As per the State Plan, the Governor will notify EWIB of approved plan amendments and contract amendments would be initiated to reflect the additional performance expectations.