



439 South Union Street
Lawrence, MA 01843
Phone: 978-682-7099
Fax: 978-794-1901

September 30, 2010

Ms. Jennifer James, Undersecretary
Executive Office of Labor and Workforce Development
One Ashburton Place, Suite 2112
Boston, MA 02108

RE: MVWIB High Performing Workforce Board Resubmission

Dear Undersecretary James:

Enclosed please find our High Performing Workforce Investment Board resubmission. We have included four copies for you and the reviewers.

This submission is intended to be an overview of our strategic plan. It is a working document that will be adjusted as future workforce developments warrant. Thank you for your patience and advice.

We look forward to hearing from you soon.

Sincerely,

Joseph J. Bevilacqua
Chair

Honorable William Lantigua
Mayor of Lawrence & CEO

Rafael Abislaiman
Executive Director (i)

cc: File

Merrimack Valley Workforce Investment Board
High Performing WIB
September 2010 Resubmission

Table of Contents

Submission Letter

Table of Contents

Certification Package with New CEO Signature

Power Point Graphics

Proposal Narrative

Revenue Plan

Strategic Plan Performance Scoreboard

ITA Tracking Tool

Dashboard

Barriers Press Release

Continuous Quality Improvement Items

Meeting Minutes

Updated CEO Agreement

Updated By-Laws

ATTACHMENT E


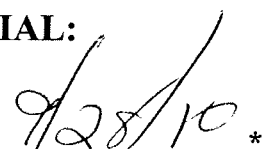
**LOCAL WORKFORCE INVESTMENT BOARD
CERTIFICATION PACKAGE**

Merrimack Valley Workforce Investment Board

LWIB Name

Submitted for High Performing Certification Review to
Executive Office of Labor and Workforce Development


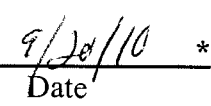
CHIEF ELECTED OFFICIAL:

Signature Date

William Lantigua, Mayor of Lawrence, Massachusetts
Typed Name and Title/City

LWIB CHAIR:

Signature Date

Joseph Bevilacqua, President Merrimack Valley Chamber of Commerce
Typed Name and Title/Company Name

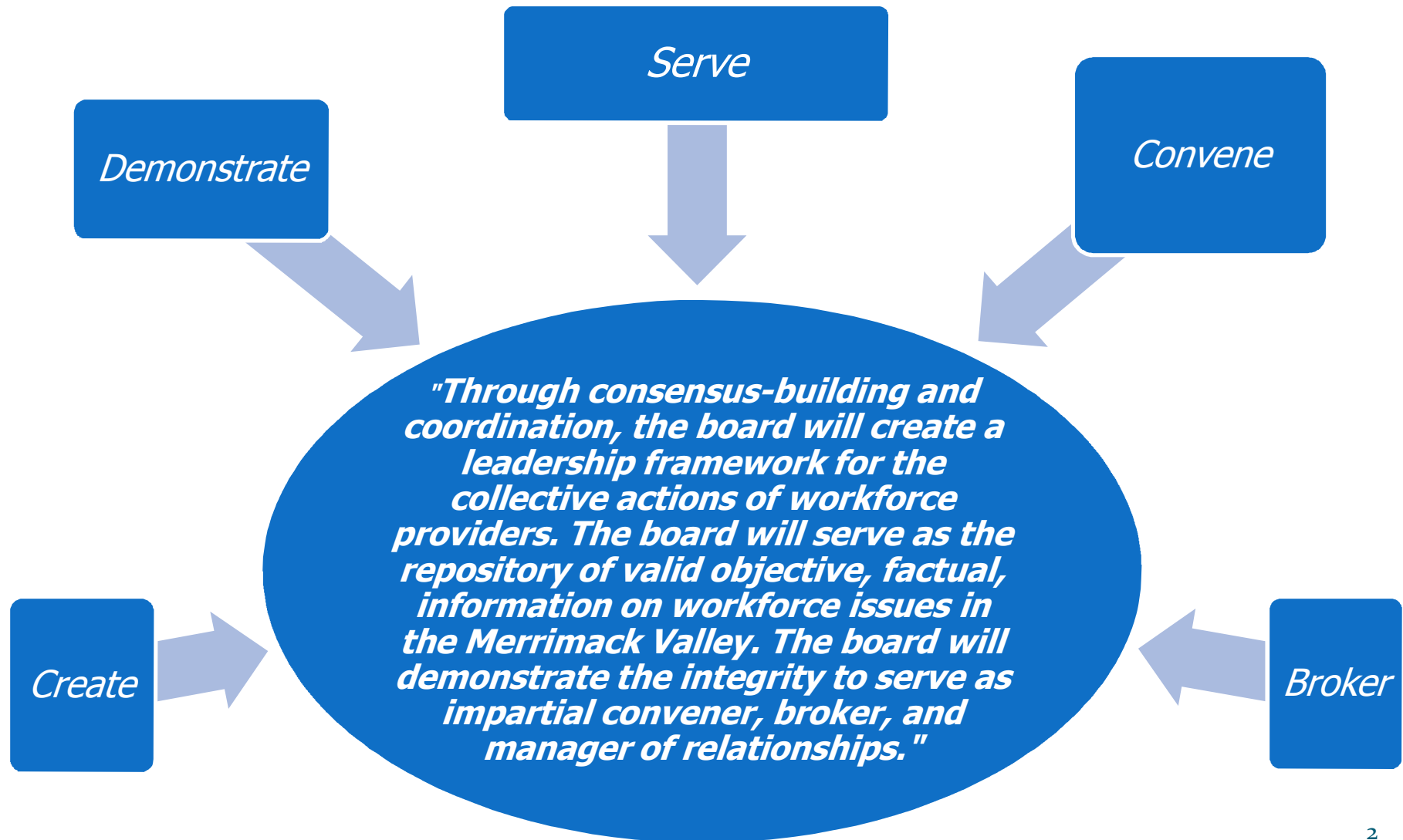
*Sign-off signifies agreement to abide by all Assurances listed in the High Performing Workforce Board instruction package.

Merrimack Valley Workforce Investment Board Vision

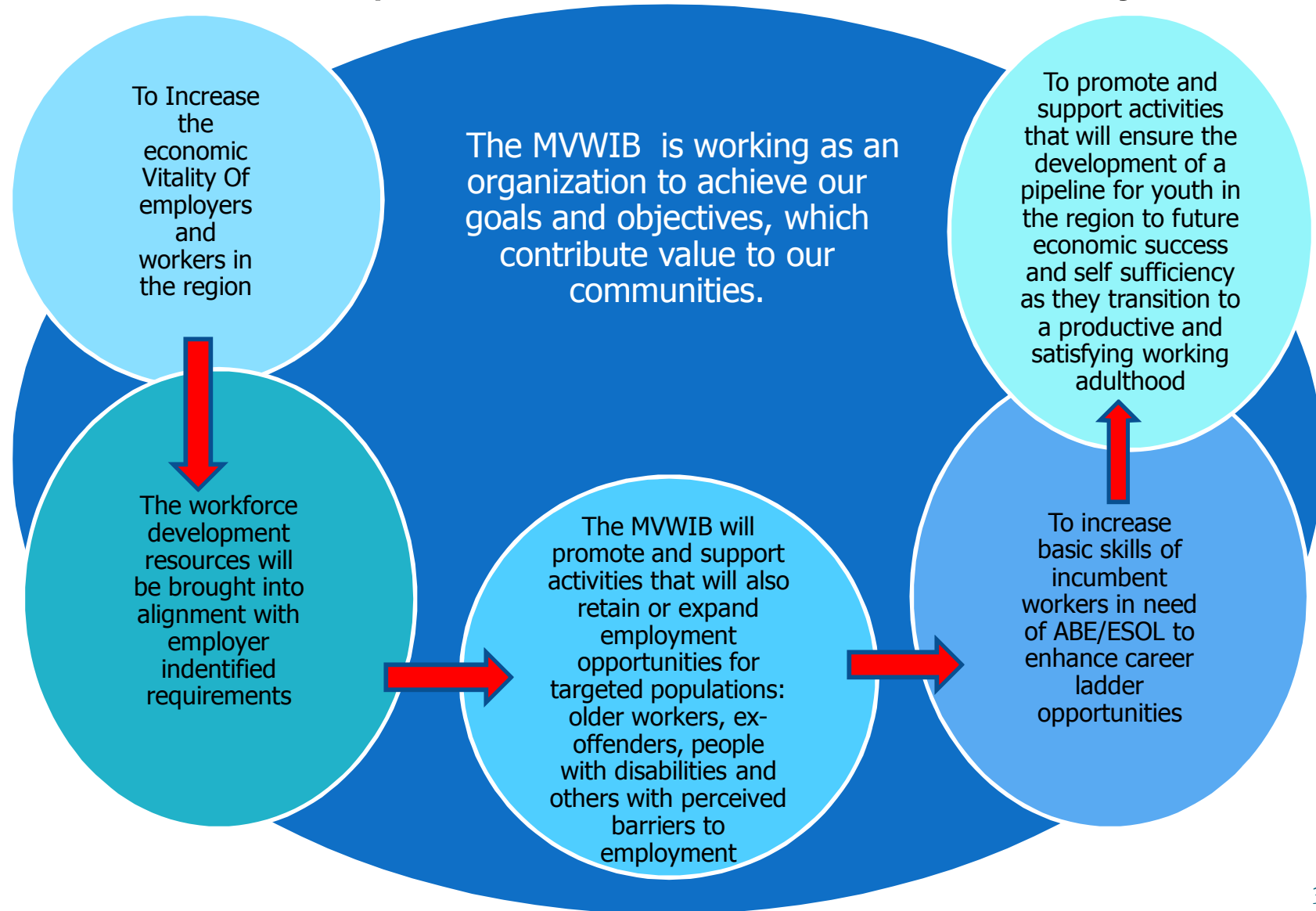
*Provide leadership by
facilitating private
and public
stakeholders'
positive impact on
the economic health
of the region.*



The Mission of The Merrimack Valley Workforce Investment Board

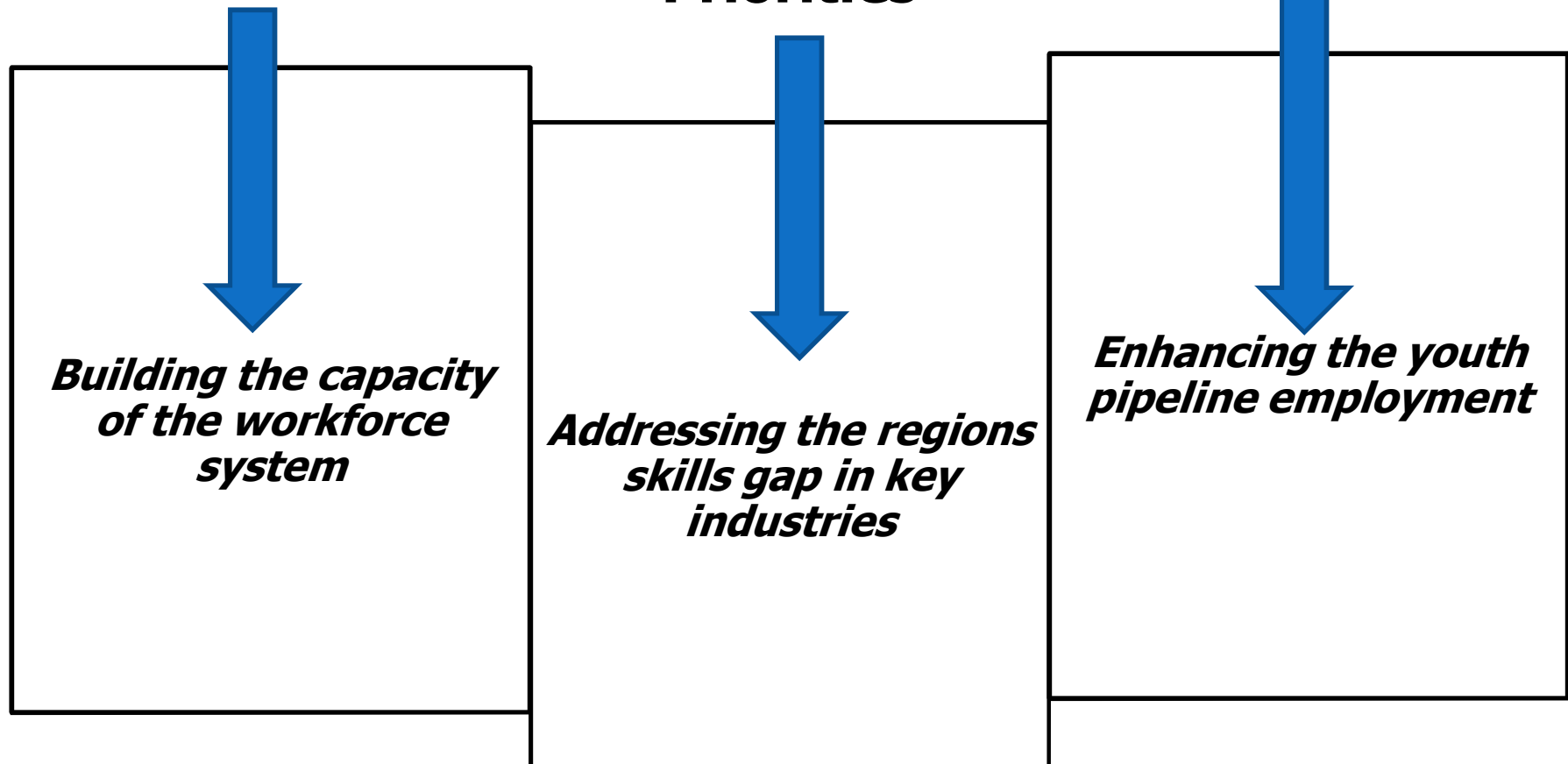


Merrimack Valley Workforce Investment Board Objectives

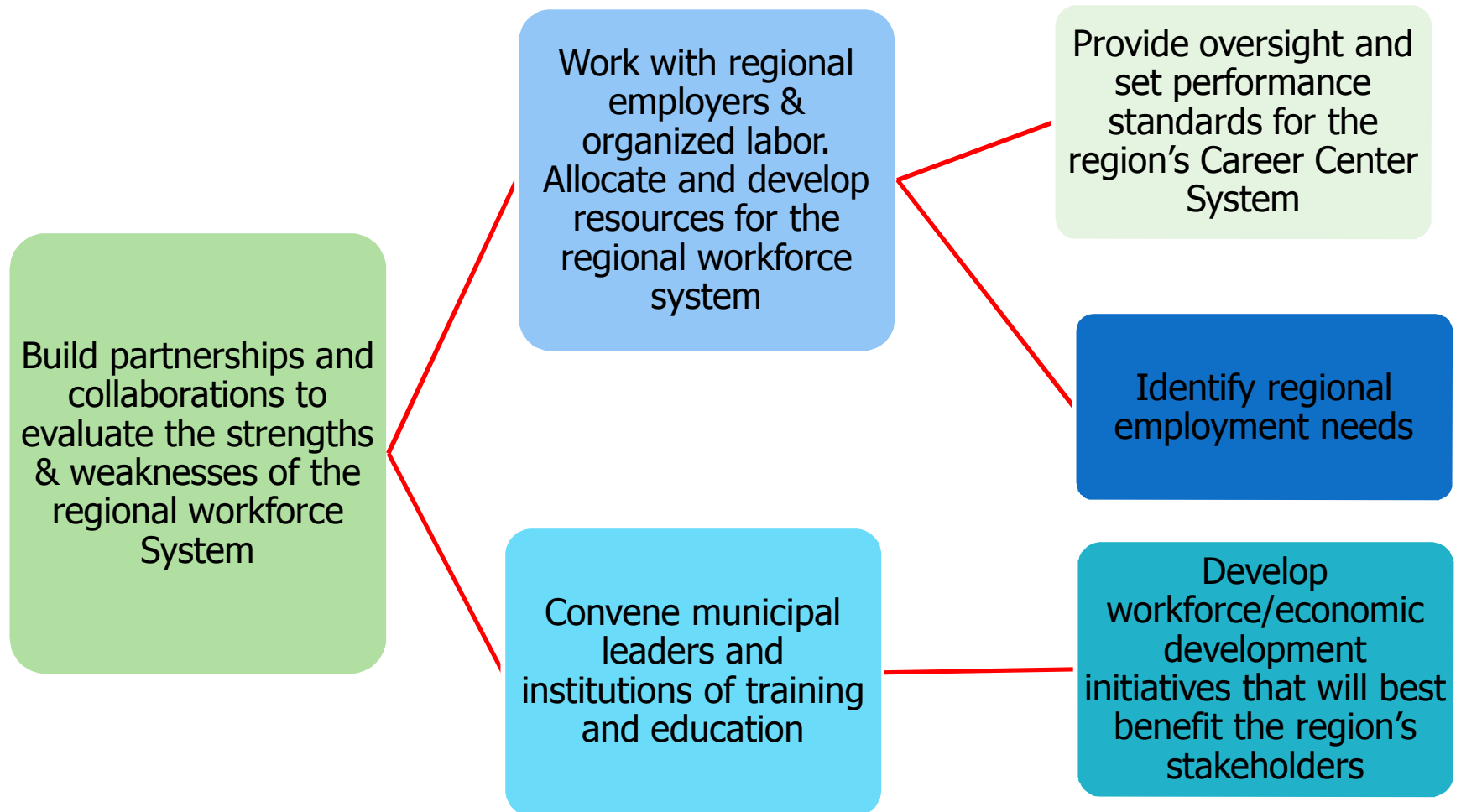





Merrimack Valley Workforce Investment Board Priorities



The Merrimack Valley Workforce Investment Board Systemic Overview





The Merrimack Valley Workforce Investment Board's Committees will help define the work that will be done to carry out the elements of the Strategic Plan.

COMMITTEE STRUCTURE

Executive Committee

The Executive Committee will be comprised of the Chair, the First Vice Chair, and all Committee Chairs. They are responsible for the oversight of the regional MVWIB on policy, performance management, and monitoring outcomes related to the high performance of the strategic plan.

Planning Committee

The Planning Committee will develop workforce development plan recommendations including resource allocations and specifications for the various program categories. They will also review all proposals submitted for funding; develop contract recommendations; and oversee the evaluation process. This Committee will also evaluate Career Center performance, assist in developing corrective action plans, and utilize evaluation information to drive strategic planning.

Youth Council

The Youth Council oversees the performance of WIA-funded programs for in-school and out of school youth. It is responsible for developing strategies to address the critical workforce challenges facing the region's youth.

Nominating Committee

The Nominating Committee will, develop recommendations for board membership and will determine and oversee an orientation program for current and new members, and will develop and provide nominations for officers of the corporation.

Education Committee

The Education Committee will inform members, vendors and the community at large on applicable federal and state workforce development policies. It will engage members in identifying programs and services that best meet industry and job seeker needs within those parameters and then help describe and share information on implemented plan outcomes.

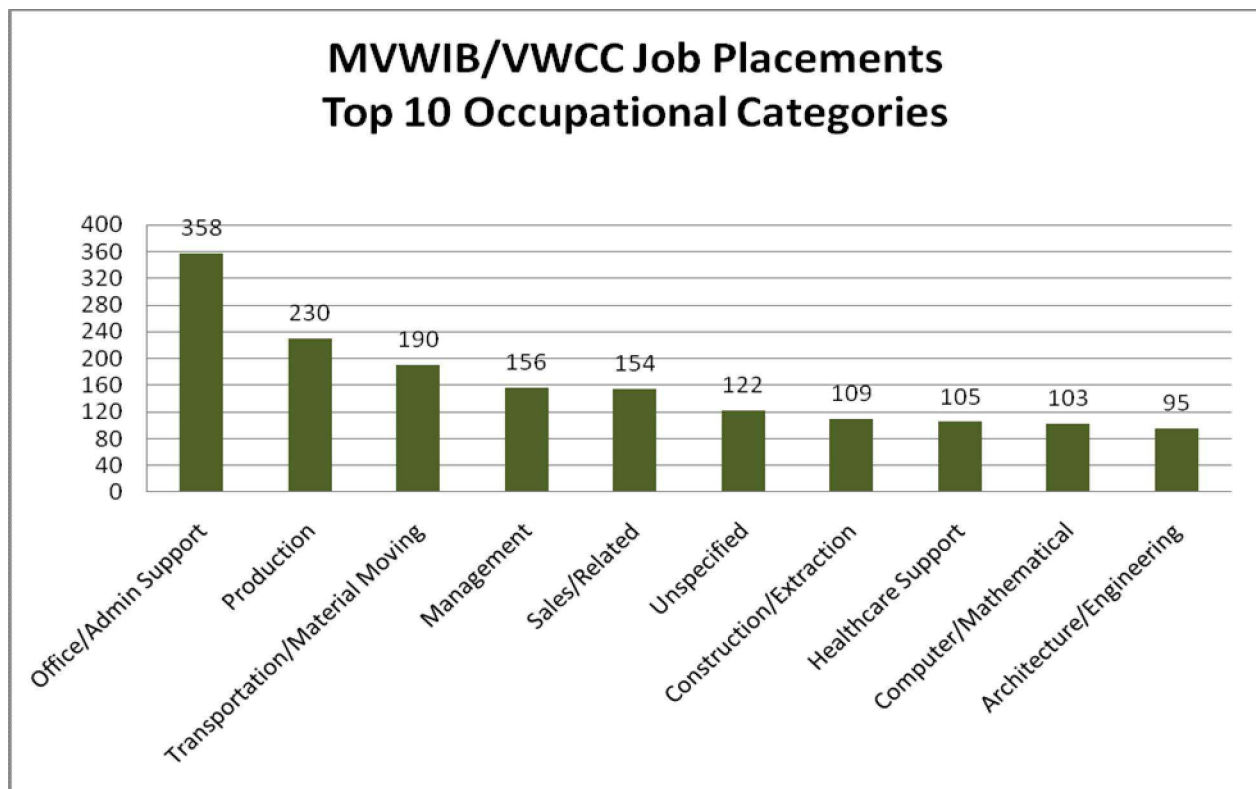
Merrimack Valley High Performing Workforce Board Action Plan Response September 2010

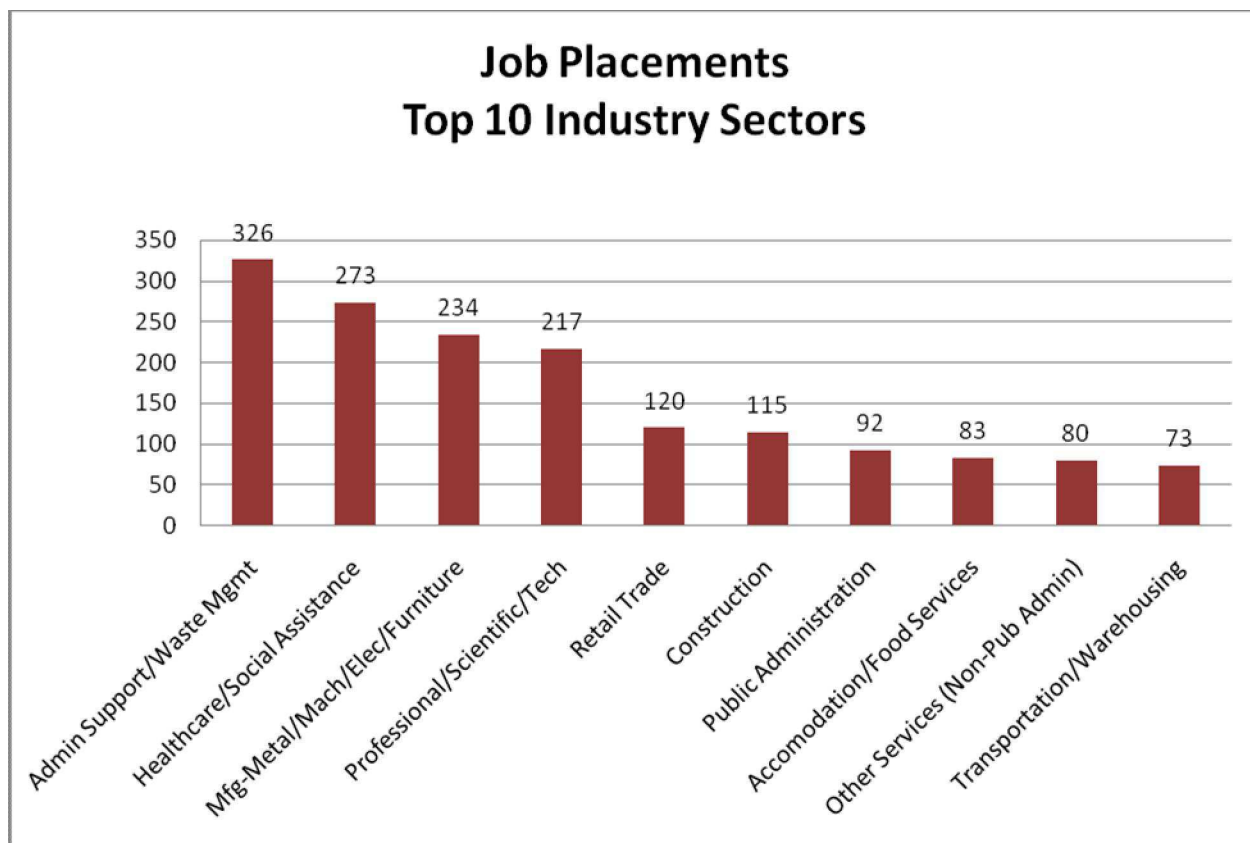
The Merrimack Valley Workforce Investment Board (MVWIB) has reviewed and approves this response to the EOLWD High Performing WIB Action Plan recommendations received from Under-Secretary James on June 18, 2010. This response clarifies, builds on, and amends the MVWIB's previous Action Plan.

Background:

The MVWIB began the High Performing WIB Certification process approximately two years ago. Since then, our state and nation have experienced what is now called the "great recession". The recession resulted in unprecedented pressure on local workforce areas. They responded to the needs of hundreds of thousands of newly unemployed workers, employers struggling to survive with less financing and fewer customers, and strained public resources for our system due to tax losses.

Our local system responded by providing employment and reemployment services to an unprecedented number of job seekers and by engaging employers and education vendors to determine where there were jobs for the newly unemployed. The two below charts illustrate the top ten occupational skills and job categories in which our customers found jobs. It includes both training and non-training related FY10 ValleyWorks Career Center job placements.





The infusion of ARRA funding and the participation of key industry partners helped the MVWIB develop training options designed to address workforce training needs. We also sought and attained additional resources to augment declining state and federal formula funds.

As the following pages demonstrate, the MVWIB recently realigned and restructured itself. We have also participated in numerous collaborations to help build our region's key employment sectors and increased planning and cooperation among system partners to better correlate MVWIB services to regional employment opportunities.

A continued commitment to the objectives and goals outlined in our Strategic Plan has been demonstrated by our new MVWIB Chief Elected Official (CEO), by established and new board members, and by new MVWIB staff. New tools to inform and support the board have also been developed and strengthened.

Building System Capacity

MVWIB board membership has remained stable and largely unchanged for the past three years. New membership accounts for less than twenty percent of the total. Chairman Joe Bevilacqua and the same slate of officers are likely to hold board leadership positions for the coming year.

In testament to the MVWIB membership and leadership capacity, Joe continues to serve as Co-Chair of the State WIB alongside Governor Patrick. Former Massachusetts State WIB, MVWIB

and National WIB Chair Leonard Wilson is also a member of our board. Both of these gentlemen are working testimonials to the continued high performance of the MVWIB.

While our board's membership and committee leadership remain stable, there have recently been other significant changes that are quickening the pace at which the MVWIB is strengthening both itself and this region's workforce system. New CEO, Lawrence Mayor William Lantigua, is very engaged with MVWIB workforce development issues. The Mayor has designated a new MVWIB Executive Director and a new WIA Title I administrator. The CEO has already demonstrated a transformational interest in youth training and development.

As described in our September 15th, 2010, Planning Committee minutes, Mayor Lantigua successfully advocated for a change in the MVWIB's youth training eligibility criteria. This region's eligibility criteria has been expanded to include youth who are not inordinately challenged by academic or personal issues, but who are indeed economically disadvantaged and who still face significant academic, economic and other barriers to success because of their family situation or because of where they live. The change will have a direct impact on this region's employers because they will have a larger number of well trained youth from which to choose.

As described in our Strategic Plan and outlined in this document, the MVWIB intends to focus a larger part of its youth funding on preparing youth to fill STEM and other jobs of the future. Youth who are in the 95% 'economically disadvantaged' category, but who are more able to use MVWIB WIA skill training and services, will now be eligible to use them. Additional program access will help ensure that annual WIA Youth training funds are fully and effectively spent.

The MVWIB will also work to emphasize education, training and work experience as ways out of poverty. This recent change will allow the MVWIB to help more area youth get themselves and their families out of poverty. We will redouble our efforts to get both public and private youth workforce development funds into this region.

There have also been internal, organizational policy changes. Our new part-time Title 1 Administrator was previously the MVWIB Executive Director (ED). Before leaving the ED position, he radically reorganized the role of the Division of Grants Administration. Fred Carberry, acting as the CEO's part-time Title I Administrator, now leads a Division with a more strictly fiscal mission. Planning, performance management, monitoring and all oversight functions are now under the direction and management of the MVWIB.

The MVWIB has a new Executive Director who emphasizes continuous quality improvement (CQI) for the Merrimack Valley Workforce Investment Board and staff, the ValleyWorks Career Center and MVWIB training vendors.

Workforce capacity building at the MVWIB is intrinsically tied to its own CQI. A well-informed board is better able to focus on identifying and filling both industry-identified skills gaps and Commonwealth jobs. With ongoing CQI, the MVWIB is better able to ensure that increasingly scarce resources are effectively and efficiently used to serve this region's employer and workforce clients.

The Board's increased understanding of the limitations and regulatory requirements of WIA and other funding streams will assist members in identifying gaps in services and in formulating appropriate revenue development and allocation plans with staff. MVWIB decisions will consistently add value within the parameters of existing State and Federal laws and statutes.

As in the past, MVWIB initiatives and objectives are identified and incorporated within the scope of the Governor's identified priorities. They include increasing informational postings, customer and partner information and data on the MVWIB website, increasing media and public service announcement postings and releases to publicize WIB activities and opportunities, and exploring regional processes and policies that may need change or updating to meet today's workforce challenges.

The addition of various board tools - developed through the High Performing WIB application process, as well as the CQI- nature of the discussions held at board meetings - illustrated by their minutes and some of the other documents included in this submission, all show how much work MVWIB members, staff and system partners have done to build a strategic action plan that enhances capacity and continuous improvement.

The following pages and attachments provide responses to the items raised by EOLWD in its June 18, 2010 Action Plan. They include:

- The Action Plan response
- Meeting Minutes
- ED Board and Title 1 CQI – Youth Council Role, the Title 1 Administrator and WIA
- Request for a Title 1 Administrator Planning Committee Decision Review
- Press Release re barriers
- New MVWIB By-laws and CEO Agreement
- Updated Strategic Plan Spreadsheet
- Updated Revenue Plan
- New Board Tools

Regional Impact Strategies

Main Goal: *Develop and/or clarify the connection between the labor market challenges of the region, the Board's priorities, strategies and measurement of results. (Questions 1, 7, 9, 11 relate to these issues.).*

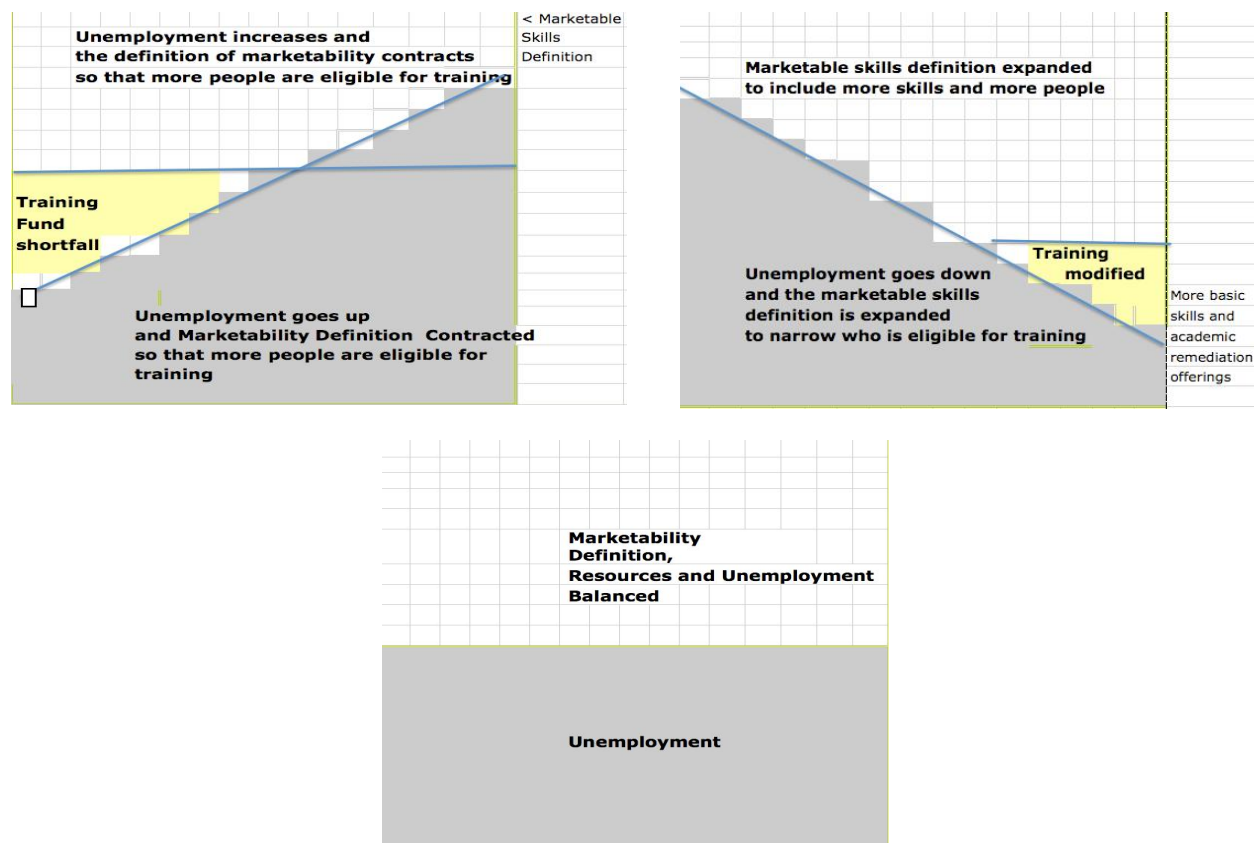
- **Board Discussion:** *Sponsor and **document** discussion(s) and working sessions with the Board to identify/clarify the key regional impact strategies. These strategies should encompass the activities of the Board to “roll up” to the big picture labor market goals it is trying to solve. (e.g. increase diploma rate for youth in region). It is expected that Board members will engage in this work. Documentation could be in the form of minutes of meeting with the Board or products/tools created by the Board etc.*
- **Written clarification:** *Document and submit the major impact strategies the Board intends to implement. Refine strategic plan or develop **supporting tools** to articulate these goals. Support tools must connect the specific strategies of the Board back to major priority areas/impact strategies (labor market needs of the region).*

MVWIB Response:

One-stop career center customer assessment, case management and referral constitute the greater part of this and other WIBs' use of workforce development funding. The MVWIB dashboard helps the MVWIB 'roll up' ValleyWorks Career Center performance. It is a useful tool developed for the system to which the MVWIB has added "*Percentage Customer Service Advisor (or self) assessed as not suitable for training due to "marketability" and "Average Time from Customer Service Advisor contact to customer training referral"*" entries. Some customers take themselves out of the training path because they do not come to scheduled meetings. Others are not referred to training vendors because they have marketable skills. The new entries are intended to track performance in both areas.

The MVWIB is striving to make our training eligibility assessments more flexible and responsive to changing unemployment rates. To do so, we are defining marketable skills not in absolute terms but as something flexible and contingent upon the availability of jobs not only in the overall employment market but also within the industry sectors therein.

Our more flexible marketable skills criteria is illustrated by the below seesaw model which can also be used to gauge the difference between available resources and present need.



As meeting minutes show, employers and vendors on the MVWIB are both interested in using this more flexible system to analyze sector employment needs. MVWIB members are very aware of the difficulties involved in offering customer training and placement services when the customer training eligibility criteria remains fixed during a deep recession.

The Individual Training Account (ITA) system uses most WIA customer training funds. ITA are used to fill most of the skill gaps identified by employers. Because of ITAs importance to the system, the MVWIB created a new ITA Tracking Tool. A version tracking FY09 and FY10 ITAs is in the attachments. It is a useful tool that the MVWIB will be able to use during the RFP development process and in the creation of its Annual Plans to the State.

The MVWIB is also developing a quarter-to-quarter ITA tracking tool that will again compare ITA referrals against employment training related job placements, wage gains, training referral versus job placement time and other such items per industry sector. We plan to have that ready for the January 2011 Board meeting. The MVWIB will refine its ITA Tracking Tool as needed for it to be useful to Board, staff, vendors and other system partners.

1. Regional Labor Market Strategies and Goals:

As described in our initial Strategic Plan Introduction and Background Section pages 1-5, the MVWIB began the HPWB Planning Process by hosting a regional presentation on the labor market by Paul Harrington of the Center for Labor Market Studies at Northeastern University.

The presentation provided significant information on the demographics, characteristics, and composition of both workers and employers in the region. It set the stage for the development of a Strategic Plan that has evolved throughout the subsequent months. Our plan includes the direct involvement of employers, economic development groups, sector focus groups, education and training providers, community service agencies, workers and jobseekers.

The original submission determined that the Strategic Plan would embrace the three comprehensive workforce priorities outlined by the Governor:

- ◆ Building the capacity of the workforce system
- ◆ Addressing the region's skill gaps in key industries
- ◆ Enhancing the youth pipeline to employment

Our effort to meet the first priority item has been described above and will continue to be addressed throughout this document. The next sections address the second and third of the Governor's priorities.

ADDRESSING KEY EMPLOYMENT SECTORS:

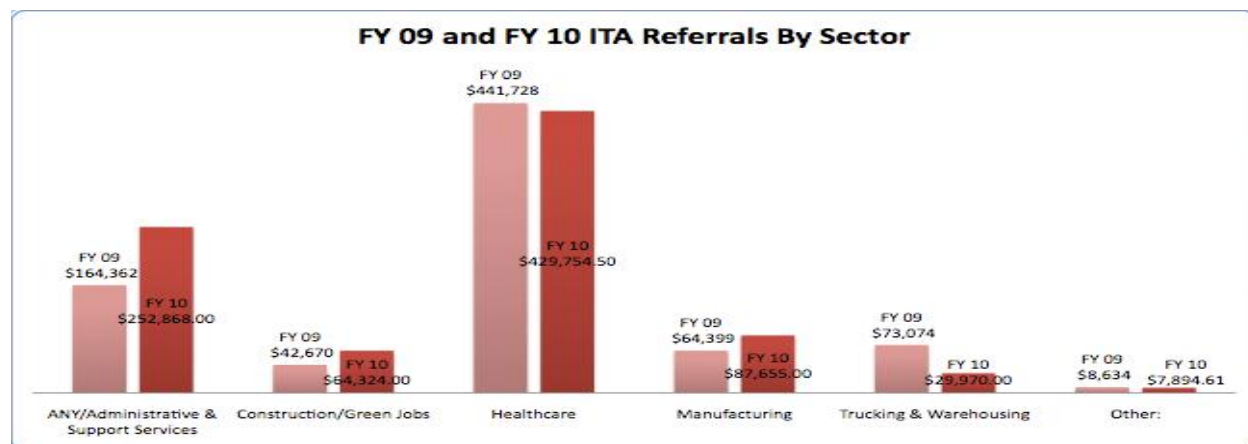
Throughout the economic changes and upheaval of the last eighteen (18) months, healthcare and manufacturing remain the two most important employment sectors in the region. The MVWIB's Strategic Plan continues to give each of them special focus. At least seven additional projects and interventions designed to meet evolving health care and manufacturing needs are included in our plan.

Some of the projects have recently been modified to better match client interest as well as national and regional changes in the short-term growth of green sector, health care and manufacturing jobs. Other future projects and interventions will be implemented as needed to ensure the MVWIB's best possible use of public and private resources.

Green Construction/Energy and Industries and Life Sciences are two additional sectors identified by the MVWIB as having potential future significance in this region. Because the economic recession has affected the rate at which these industries are growing regionally and at the state and national levels, the MVWIB has accordingly adjusted the implementation of its ongoing strategic plan.

Healthcare:

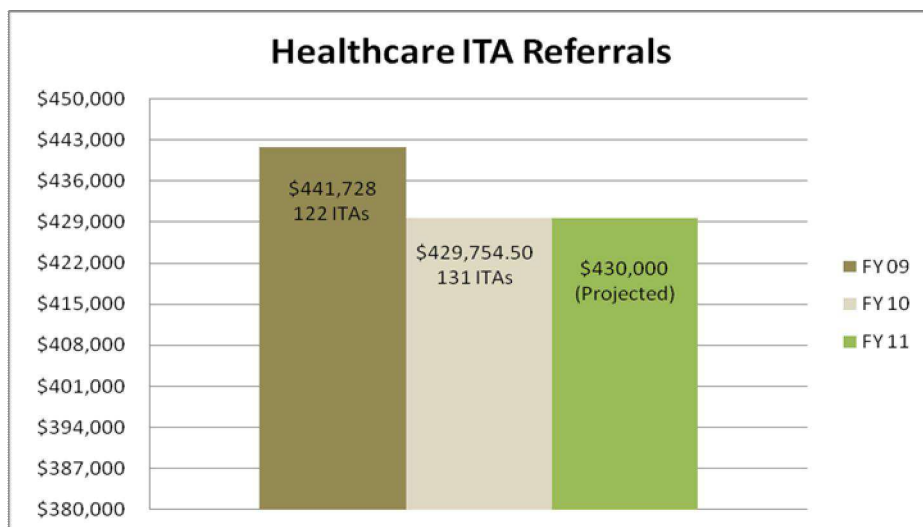
Healthcare-related training and job placement forms the largest part of our WIA training efforts. As seen in the below chart, the largest share of MVWIB formula funding and a majority of its customer training funds are targeted toward this sector.



The MVWIB has also utilized ARRA funding to develop new healthcare group training programs for sixty (60) adults and older youth interested in becoming Emergency Medical and Pharmacy Technicians. Programs in other healthcare occupations include youth group and ITA training slots for 18 CNAs, 10 Medical Assistants, 20 Nurses Aides, 16 Medical Billing/Coding workers, LPNs, Phlebotomists, and others.

As illustrated by the following chart, healthcare will continue to constitute the largest percentage of our ITA referrals. Because separate FY11 ARRA youth health training funds have been

allocated, and because there has been a slowdown in healthcare sector related job placements, we plan to maintain the amount of ITA activity in this area to no more than level funding.



(A FY10 eight person difference between the above and the number in the MVWIBs ITA Tracking Tool is due to eight medical administrative assistants being included therein.

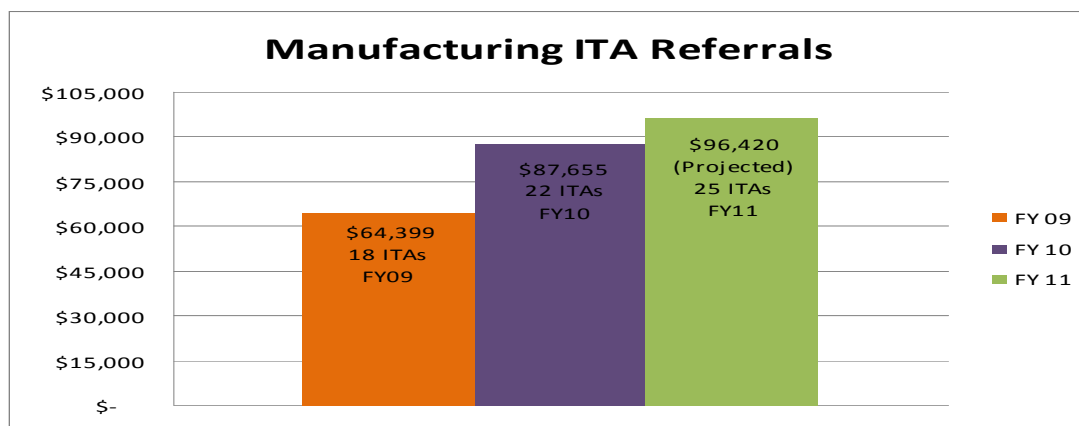
Manufacturing:

The MVWIB's focus on manufacturing is best seen in five ongoing activities and plans.

- A. Machine Shop Training** The MVWIB developed this in response to requests from employer members of the Northeastern Massachusetts Customized Manufacturing Partnership (created through a Workforce Competitiveness Trust Fund project) and the Merrimack Valley Manufacturing Advocates group which was formed as a result of a U.S. DOL Regional Innovation Grant. As a result of our joint efforts, twenty four (24) future machinists are in a group Machine Shop Training program. This innovative group training program was made possible by an ARRA grant.
- B. Advocacy for WTF** The MVWIB worked with the State to write and receive approval for a waiver from U.S. DOL which reduced the amount of employer contribution required for Customized Training. This effort was also in response to inquiries from manufacturers interested in potential workforce expansion and training. We are currently working with our regional partners and the Workforce Training Fund staff to explore additional funding options for worker training or retraining in this important sector. Until recently, the MVWIB was unsure that WTF would have FY11 or FY12 funds to allocate. Now that the fog has risen, we will advertise the availability of WTF funding and work to help this region's manufacturers qualify for it.
- C. Merrimack Valley Wide Interstate Partnerships** The WIB partnered with the Greater Lowell WIB and the State of New Hampshire WIB, manufacturing employers from each of the regions, and state and local economic development partners in the development of a

Regional Innovation Grant Strategic Plan for the Manufacturing Sector over several meetings. The Strategic Plan and Asset Mapping submitted to the U.S. Department of Labor in June 2010 is designed to promote the inter-State alignment of workforce and economic development resources to ensure the continued vitality and expansion of the manufacturing sector throughout northern and southern sides of the Merrimack Valley. With our US DOL submission, the MVWIB is strategically placed to capitalize on additional inter-state regional manufacturing initiatives that may be released by Washington.

- D. Rapid Response** The RIG partners also produced an Interstate Rapid Response Agreement between the partners to ensure timely and effective coordinated services for employers and employees who may be affected by interstate downsizings or plant closings. Some of these closings occur in older smoke-stack manufacturing. The MVWIB will continue every means to facilitate employer and employees' transition to new growth manufacturing.
- E. National Emergency Grant State Set Aside efforts** Many plant closings are occurring in the manufacturing sector as old industries go overseas and new ones take their place here in the Merrimack Valley. For example, In August, 2008, Procter & Gamble announced that it planned on closing its Gillette packaging plant in Devens, Massachusetts. This closing of the Sonoco plant will occur by the end of December, 2010 and will affect 800 to 1200 Sonoco and Debbie's Staffing employees remaining at the site. Most of them reside in Greater Lawrence. Procter & Gamble cited escalating labor costs as the reason for the closing. They plan to move the packaging operations to Mexico and Poland. In light of this decision, Rapid Response was notified and MVWIB/VWCC filed a Trade petition on 10/09/2009. Both Sonoco Packaging Products and Debbie's Staffing were Trade certified on 12/09/2009 and the MVWIB has now submitted a National Emergency Grant (NEG) Application. With those funds, we expect to be able to NEG- train several laid off workers in order to fill several entry-level manufacturing jobs. We qualify our efforts by saying 'entry level' because virtually every Sonoco and Debbie's Staffing customer will have English-language proficiency and basic literacy issues. Local manufacturers are crying out for well-trained individuals and only a few of these dislocated workers may qualify.
- F. Manufacturing-related ITAs** The MVWIB will work to increase enrollment in manufacturing-related ITAs. This is in keeping with its strategic plan and continues to reflect a significant number of this region's employer needs.



A manufacturing employer on the MVWIB released part of our 2011 annual survey. It assesses and identifies current manufacturing workforce training needs, employment and hiring expectations, and other workforce development issues affecting the manufacturing sector throughout the region. A copy of the survey is included in the attachments.

The MVWIB's FY 10 employer survey helped the Board design its five-program, ARRA funded menu of group training programs that resulted in funding for twenty-four (24) new group machinist training slots in addition to the ITA funding illustrated above. This injection of ARRA funds about doubled the numbers of people being trained as machinists to forty-nine (49).

The manufacturing wages and other performance criteria illustrated in our ITA tracking tool supports the near doubling in this sector's allocated resources. The newly developed group machinist training program has now been approved for Trade as well as ITAs. Additional WTF monies may augment this increase even further.

Green Construction, Energy and Industry Jobs:

The MVWIB convened a Green Jobs Advisory Board and regularly met with it as documented in our earlier submission. The advisory board is comprised of employers, education and training providers, and workforce stakeholders. It met quarterly to explore opportunities for collaboration in this potentially important sector.

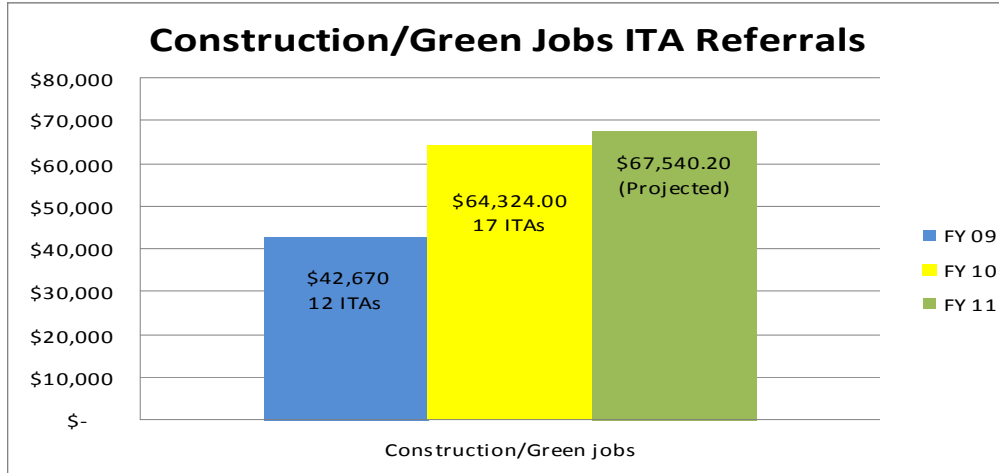
Following the advisory board's suggestions, ARRA funding was utilized to fund a "Green Handyman Program" which is preparing fifteen (15) enrollees for jobs in light construction and energy saving device installation.

The WIB is also collaborating with Northern Essex Community College (NECC) in support of ITA based energy auditor training by Clean Edison at the NECC Lawrence campus and throughout the region. Six (6) FY11 ITA slots have so far been filled toward this end.

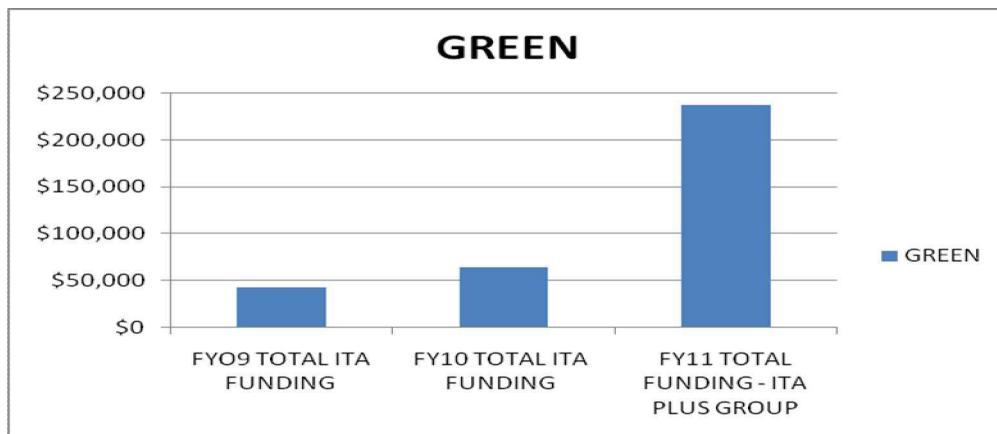
A regional project recently funded by the Massachusetts State Energy Sector Partnership (SESP) adds to the MVWIB list of past collaborations with the Greater Lowell and North Shore WIBs and Career Centers. Through this project, area community colleges, technical schools and other training providers will work with green industry employers to prepare thirty-five (35) new and thirty-three (33) incumbent workers from each of the three regions for positions in targeted green industry sectors over the next eighteen months. All participants will receive Green related training and job placement when necessary.

It should be noted that the MVWIB Chair Joe Bevilacqua is a member of the State Energy Sector Partnership (SESP). MVWIB Chairman Bevilacqua will continue to ensure that his colleagues on the MVWIB and the MVWIB staff are up to date on green energy developments. The MVWIB is now in discussion with the Merrimack Valley Chamber and NEXAMP on how to provide up to 68 new and incumbent green workers with tailored industry-related training at up to 25 companies throughout the Merrimack Valley and North Shore region.

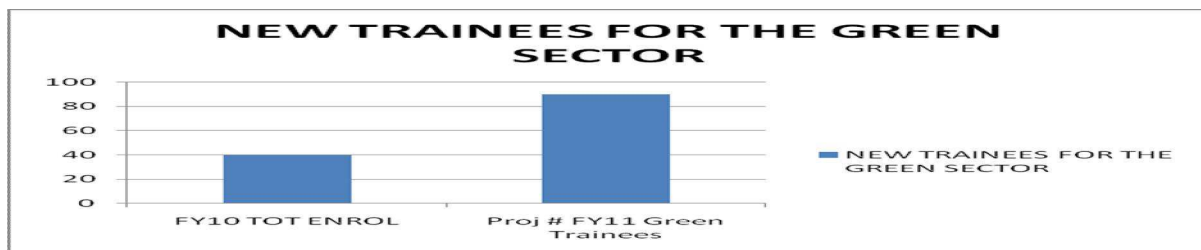
Chairman Bevilacqua plans to present information on the Merrimack Valley Chamber's Green program with NEXAMP to approximately twelve MVWIB SESP partners at our October 7, 2010 partnership meeting. As the chart below indicates, our Strategic Plan objective is to continue to increase ITA funded training in this sector during FY 11.



If one adds the FY 11 ARRA-funded group program at IIGL (\$70K) and the SESP funded portion that's for new employees (approximately \$100K) to the above, MVWIB FY11-FY12 Green program funding is multiplied by more than 400% in FY11.



The number of new, green sector employee trainees more than doubles in FY 11. It should be noted that an additional thirty-five (35) incumbent Green Sector workers will also be trained. and that number is not included in the following chart.



Due to potential changes in the national and state political picture, the MVWIB will closely track green sector job opportunities. We are now striving to make new connections in order to succeed in this sector.

Life Sciences:

The Life Sciences sector includes elements of both manufacturing and healthcare, including businesses in medical instrumentation, biomedical technology, pharmaceuticals and biomedical devices. While not currently a major sector for either group training or ITA referral, the development of a large scale Nano-technology center at UMass Lowell will likely draw a larger number of related companies to this area.

By making Life Science one of its critical workforce development focus areas, the MVWIB is attempting to ensure that this region will be ready to respond to the labor market needs of high growth industries in both the near and more distant future.

The MVWIB and its one-stop career center collect useful emerging industry job opening information. About three hundred and fifty of our non-training assisted job placements describe themselves as engineers, managers, mathematicians or other dislocated professionals who possess stronger academic backgrounds. It is certain that many other people in those categories continue to look for work.

In keeping with longer term strategic planning, our board has also made the decision to help prepare more inner-city area youth for emerging technologies that require good STEM skills. This is more completely outlined in the next section.

2. Youth Pipeline:

The MVWIB is focused on four major impact strategies designed to increase and enhance the pipeline of youth preparing for employment in our region. They are as follows:

- A. Expand program access for the region's economically disadvantaged youth** At their September 2010 meetings, the MVWIB Youth Council and Planning Committees voted to expand the list of eligibility barriers applicable within the MVWIB (September 2010 meeting minutes are attached). This change will allow more economically disadvantaged youth to be eligible for our program services. The change is also intended to help remind youth that educational achievement and effort are rewarded. The additional barriers are:
- a. Youth living in designated census tract poverty areas
 - b. Youth living in non-traditional households
 - c. Youth living in public housing

These additional barriers will allow enrollment training for economically disadvantaged area youth who do not have critical educational issues. It will create a larger pool from which to draw STEM capable or interested youth.

B. Increase training options for Out-of-School Youth: Three new group program offerings were developed in FY10 for out of school youth. Prospective vendors were encouraged to submit innovative proposals for services not provided under our current ITA and youth group training systems. The MVWIB specifically encouraged programs focusing on green and manufacturing jobs. Our request for proposal was written, and received proposals were reviewed, with importance given to adding additional OSY training vendors and expanding the range of gender neutral training options (minutes previously submitted). As a result, the following programs are taking place in FY11.

- **A Green Handyman Training Program with an ESOL component.** Students learn light construction and building and device enhancements that promote energy conservation and the use of green materials. This International Institute of Greater Lawrence program will result in NABCEP or Commonwealth Handyman certifications and will provide career ladders for some of our hardest to serve job seekers, including up to fifteen (15) older youth with limited English language skills.
- **An Automotive Technologies Program** In this program, twelve (12) youths and adults are trained in auto repair and maintenance. This activity is undertaken through a collaboration that includes a private vendor and a regional technical high school.
- **A Culinary Arts Program** for twenty-four (24) youth who are being trained in a public regional technical high school by a separate, private vendor.

Group OSY programs similar to the above will occur in FY12 and later if program results, availability of funds and youth interest justify refunding.

Going forward, the MVWIB's recent expansion of eligibility barriers opens the door for more in-school youth training. The MVWIB plans on expanding our menu of training services for both in- and out- of- school youth using not only WIA and other public dollars but also foundation and corporate funding.

After years of trying, the MVWIB received its 501C3 approval from the IRS in September 2010. 501C3 certification will allow the MVWIB to solicit funds that are not available to state and local governmental entities.

The Lawrence CEO also approved funding for a new MVWIB Resource Development Manager position focused on finding new public and private sources of revenue for our activities. The position was filled in late September.

C. Increase High School Diploma/GED attainment for out-of-school youth: The MVWIB believes that the attainment of a high school diploma or GED is essential for future economic and personal success. All youth who receive services through the ValleyWorks Career Center will be provided with information and referral to programs designed to meet their particular educational needs. All WIB funded youth programs and projects will either provide or connect with credential or non-credential offering intermediate and basic level educational programs.

D. Increase Youth Work Experience. The MVWIB believes that work experience is essential for youth to develop a successful work ethic that increases their chances of future employment and employment success. This summer, the MVWIB and ValleyWorks facilitated YouthWorks summer employment for a total of 227 youth in Lawrence, Haverhill and Methuen. Their private and public sector employment included jobs in:

- Office and technologies
- Child Care
- Camp Counseling
- Landscaping
- Recreation
- Health Fields

The following is a list of the employers that participated in this year's programs:

ABE BASHARA BOATHOUSE	LAWRENCE CITY HALL COMPTROLLER
APPLE WIPER	LAWRENCE CITY HALL DPW
ARC OF GHN	LAWRENCE CITY HALL ELECTIONS
BELLEVUE CEMETERY	LAWRENCE CITY HALL PERSONNEL
CARDINAL SHOE	LAWRENCE CITY HALL REC DEPT
CATHOLIC CHARITIES	LAWRENCE CITY HALL WATER DEPT
CITY OF HAVERHILL HIGHWAY DEPT	LAWRENCE DPW MUNICIPAL YARD
CITY OF HAVERHILL PARK DEPT	LAWRENCE HIGH SCHOOL
CITY OF HAVERHILL WATER DEPT	LAWRENCE RECREATION DEPT
COMMUNITIES TOGETHER	LEO & SONS AUTO
COMMUNITY ACTION	LHS CELL PHONE PROJECT
COMMUNITY DAY CARE	LITTLE DELI
COMMUNITY GROUP	LITTLE SPROUTS
CONSENTINO SCHOOL	M V CHAMBBER OF COMMERCE
EMMAUS, INC	M.V COMM SERVICE CORP
ENCORE STAFFING	MASS REHAB COMM
ESSEX ART CENTER	METHUEN ARLINGTON CENTER
FOOD FOR THE WORLD	METHUEN HOUSING AUTHORITY
FRAME MY TV	MOODY SCHOOL
GLCAC	MVCSC
GLTS	NAPA METHUEN
GREEN VISION	NEIGHBORS IN NEED
HADLEY WEST APTS	NEW BALANCE
HAV WASTEWATER TREATMENT PLANT	PARKSIDE
HAVERHILL BOYS GIRLS CLUB	PENACOOK PLACE
HAVERHILL HIGH SCHOOL	PRESIDENTIAL GARDENS
HAVERHILL ICE RINK	RIVERSIDE PARK
HERITAGE PLACE	RUMBO

KAZMIERA MARINA	RUTHS HOUSE, INC
KIMBALL INSURANCE	SALS PIZZA
LAMBERT ROOFING	SILVERMANE
LAW/METH COMM COALITION	STRYBNY FARMS
LAWRENCE BOYS GIRLS CLUB	ST MARY CEMETARY
LAWRENCE CITY HALL ATTORNEY	ST VINCENT DEPAUL
LAWRENCE CITY HALL ASSESS OFFICE	YMCA HAV
LAWRENCE CITY HALL BUILDING COMM	YWCA HAV
LAWRENCE CITY HALL CITY CLERK	YWCA LAW

The number of municipal jobs on the above list attests to the involvement and commitment of the Mayors of Lawrence, Methuen and Haverhill in the support of youth employment throughout the region. Other MVWIB and Youth Council members on the above Summer Youth employment list include the MV Chamber, Sal's Pizza, Community Action and the YM and YWCAs.

- E. Though continuing Federal and State funding is critical, the MWIB will continue to engage its private and public sector partners to offer at least as many public and private, subsidized and unsubsidized jobs available to youth in the coming years. The MVWIB chairman has set a goal of increasing the number of private sector participants in our youth work experience programs by 5% in each of the coming four years for a total private sector participation increase of 20% by FY 2015.

Regional Performance Targets/Measures
--

1. ***Main Goal:*** *Once the Board identifies its major impact strategies, how does it track and communicate progress to the Board/external world? Describe how these processes will be embedded in and drive the Board activities. (Questions 1, 12 and 14 relate to these issues.)*

MVWIB Response:

Our **Quarterly Career Center Performance Scorecard**, already submitted, tracks Planned Versus Actual Performance. A multi-page **MVWIB Workforce Development Dashboard** is now also added to our submission package. Our dashboard includes various pieces of information, including the percentage of people referred to vendor training by VWCC Career Service Advisors after they were classified as possible candidates by center Job Specialists. An **ITA Tracking Tool** has also been added by the MVWIB. Our ITA tool tracks training outcomes in a detailed but understandable way. The Executive Committee feels that it will be a valuable board tool.

The information included in the newly developed tools has previously been provided to the MVWIB in varying list and graphic formats. The MVWIB executive committee has reviewed and approved the new tools that are included in this resubmission's attachments. It is expected that they will help clarify complicated information. It will help all board

members be aware of the trade-offs involved in choosing one course of action over another one.

Copies of the tools will be provided at quarterly and annual meetings to give cumulative quarter on quarter and year on year pictures of the health of the organization. Both board members and community stakeholders will have access to hard copies at our meetings and electronic copies on our website.

2. **Board Discussion:** *Sponsor and document a discussion(s) / working session(s) with the Board to determine how it will report progress on the region's strategic goals. What "measures" will the Board hold itself to? It is expected that Board members will engage in this work. [Documentation could be in the form of minutes of meeting with the Board etc.]*

MVWIB Response:

Our original submission referenced various board and subcommittee meetings in which MVWIB members developed the goals included in our HPW package. The Board relied on the Executive Director and his staff to develop specific policy items and the nuts and bolts of the tools needed to track goal performance. Board, and especially Executive Committee members, were consulted every step of the way. The new products responded to MVWIB developments over the past five months. The tools created were amended by committee chairs who also approved the final product.

The board has met on the following occasions. The listed meetings, whose minutes are included in the attachments, all included discussions and decisions on issues that have a direct bearing on the MVWIB's HPW action plan.

General Quarterly MVWIB Meetings

6/24 1] Chairman Bevilacqua thanked members for participating in the development of the MV HPWIB application and requested that members continue being involved in the package's development. He thanked the Newburyport Mayor for participating 2] The annual plan was discussed and a motion was passed to approve it. 3] The new ED gave his first report, he thanked the board for their past and ongoing support for the MVWIB HPW application.

4/27 1] current performance and new ARRA programs approved by the Planning Committee outlined by its chair 2] Youth program funding outlined by Youth Council Chair. Differences between YC and the Planning Committee are not mentioned. 3] HPW package and its necessary resubmission is outlined 4] RIGG MV Manufacturing Advocates outlined 5] NDEC Health Training Program outlined 6] the retiring ED thanks the board for their leadership and staff for their support. The new ED was announced to start in May. 7] DGA grievance

policy adopted 8] Wray Wrobel, a regional credit union employer, accepted into the MVWIB

Executive Committee

9/27 1] The executive committee approves this High Performing WIB package, earlier forwarded to them for their review. 2] The Chairman recounts his and the boards involvement in its preparation

6/17 A critical, HPW-related discussion was caused by a disagreement between the Planning Committee and a vendor on one side and the Youth Council, VWCC and MVWIB staff on the other. Outcomes include the ED being directed to analyze and create appropriate procedures as part of CQI and the Advocacy Committee being changed to the Education Committee with its membership provisionally comprised of Executive Committee members.

3/30 1] The reasons for MA DOLWD's rejection of the MVWIB HPW package was discussed. Motion by Peter Matthews seconded by Cal Williams to re-affirm that the Executive Committee, on behalf of the board, is fully engaged in the application for HPWIB. 2] New delays in the MVWIB's 501C3 application were outlined 3] Fred Carberry announces his upcoming retirement as MVWIB executive director

Planning Committee

9/15 The Planning Committee supports expanding the number of youth eligible for WIA training after the Mayor of Lawrence argues on its behalf. The Youth Council recommendation not to raise second year funding for a program that did not fully meet first year performance goals is approved. The committee approves adding several new items to the High Performing WIB package. The approved list is included in the attachments.

8/18 1] A board member who owns a manufacturing company again states that portions of his industry are facing a worker availability crisis. He will be sending a employer needs survey to his colleagues in that industry 2] State and Regional Performance plan numbers outlined using lists 3] the choice between WIA ITA and the possibility of group training with other funds provided as part of CQI 4] the committee discussed new items to include in its HPW submission.

6/16 1] Open meeting law, the award process and conflict of interest standards heatedly discussed in terms of two youth group medical training programs and as part of policies and procedures related to CQI. 2] Board involved in preparing the annual plan.

5/19 Contentious debate on whether underperforming contracts should be refunded for a second year. This discussion is a critical HPW item that caused a refocusing on our youth eligibility and training referral methods. Also a statement that vendors should have equal opportunity. An ED letter to the Title 1 Administrator recounting the meeting is included in the attachments. This letter was shared with the MVWIB.

4/21 1] Third Quarter Performance Report, with info presented on written lists, is recounted. It illustrates how the MVWIB received performance information in the past. 2] The contentious issue of refunding underperforming programs first arises in the committee and is tabled. 3] HPW rejection discussed and the Executive Committee is mentioned as an entity needed to bolster the MVWIB 4] the then Executive Director again announces his retirement effective 5/1.

Youth Council

9/ 8 1] the ED apologized for the process confusion that was resolved once the Mayor's office took action 2] there was a discussion on whether to increase funding for the one 2nd year contract that was funded as a result of the Mayor's compromise. The Youth Council decided not to increase funding. 3] a motion was approved to expand the eligibility barrier and thus allow more youth to participate in training and job placement.

6/9 YouthWorks, ITAs and ARRA youth initiatives discussed. The Youth Council Chair recommends that members attend the June 16 Planning Committee Meeting where the three underperforming contracts will be discussed.

5/12 The new ED was introduced and he gave a brief bio. The Youth managers outlined the status of the new ARRA youth contracts. Amongst many other things, the underperforming contracts were again discussed.

4/14 Among the many topics discussed, the council recommended that three youth training programs at one vendor site not receive 2nd year refunding.

3. **Performance Tools for Board:** *Describe/provide the tools used by the Board's to track key impact strategies and labor market challenges. Show tracking against the broader regional performance targets for the Board. (e.g. How do the results of programs and activities of the Board and its regional partners "roll up" to increase the STEM pipeline in the region?) Question 12 directly asked how the Board measures its impact.*
- ***Create or refine the use of tools*** (e.g. "dashboard" or scorecard) *to track outcomes for regional strategies and Board activities.*

- *Describe ways in which the Board structure (committees, agenda structures/items, process etc) support the achievement of the Board's goals and intended results.*
- *Provide evidence of Board meetings in which the new performance tools were utilized.*

MVWIB Response:

Following the submission of our initial application, the scorecard was developed, with input from the High Performing WIB Advisory Council at their meeting on January 22nd. This scorecard will be one of the tools used to determine progress on the region's strategic goals. The methodology for tracking progress on the Plan was again reviewed by the Board at its meeting on March 30, 2010.

Different statutory interpretations resulted in changing the Advocacy Committee to an Education Committee at the June Executive Committee meeting. The Executive/Education Committee directed the executive director to analyze and clarify policy in relationship to a specific Youth Council-related funding procedure which he has done.

The amount and use of available training funds was discussed and questioned at all but general membership meetings. Members' questioned the training eligibility criteria and whether vendor performance or the unemployment situation was causing issues. Members asked staff to clarify the situation.

As a result

- The previously submitted scorecard will be used by appropriate committees to track progress and help develop and implement new strategies as needed. Primary responsibility for tracking will fall to the newly formed Executive Committee with input from the Planning Committee, the Nominating Committee and the Youth Council. The Executive Committee will report our progress to the full Board at the quarterly Board meetings.
- The general MVWIB membership will use the dashboard to track quarterly client service performance.
- The Planning and Executive Committees will use the ITA tracking tool to track quarterly training ITA resource allocation and outcome. A condensed version of the same tool will be provided to the general membership at their quarterly meeting.

4. **Results of Board Work:** *Demonstrate the impact of the Board to date in the key areas the Board is trying to affect.*

This has been answered throughout this document. Updates will occur as requested or as new developments arise.

Board Management and Engagement
--

1. **Main Goal:** *Overall goal of the bullets below is to describe and communicate the Board Chair and Executive Director's intention to ensure strong Board membership and participation on all Board discussions and activities. If the Board has developed a Business Plan for itself as an organization to support the implementation of the region's strategic plan, please attach. N/A*
- A. *Please describe the process and structure for how the Board will support and execute the Strategic Plan, high level goals and results. (Question 20) Describe and document in summary form, how the Board identifies the need for new members and the recruitment process as tied to the labor market solutions of the Strategic Plan.*
Strengthening the Capacity of the Board:

MVWIB Response:

Process to Analyze Need For Board Members:

The Board identifies the need for new Board members based on federally set eligibility criteria, current labor market information, and the recommendations of the CEO and other knowledgeable private and public employee hiring officials in the region.

As was previously stated, healthcare and manufacturing are currently the largest employment sectors in the Lower Merrimack Valley Area. Current membership and activities reflect those emphases. Over half of the MVWIB is comprised of private employers and fully two thirds of those are either in the healthcare or manufacturing sectors. Minority owned business representation is an additional priority that the MVWIB is starting to meet. Currently -

- Board membership includes representation from 9 (nine) of the region's 15 (fifteen) municipalities.
- We have 7 (seven) board members from the manufacturing sector and 9 (nine) members from the healthcare sector.
- The Board proactively responded to the Governor's call to support the Clean Energy Industry and has created a Green Jobs Advisory Council chaired by Joseph Bevilacqua, chairman of the MVWIB. Members of the advisory council include board members, training vendors, economic development professionals and "green jobs" employers.
- The Board established an Education committee to ensure the involvement and engagement members and vendors in developing programs and training to meet the needs of industry and future job seekers.
- The Board is also actively recruiting other private and public employers for board membership.

Current membership and represented industries/partners:

An updated chart will be submitted after our October 5, 2010 Annual meeting where several new members will be inducted to the MVWIB.

B. Describe and document the Board activities to ensure strong Board MEMBER participation and engagement. (Question 21)

MVWIB Response:

Members of the board are active participants in many board activities. Examples of existing engagement include the following:

- Chairman Joseph Bevilacqua is co-chair of the Commonwealth WIB alongside Governor Patrick. He recently sponsored a United States Governors WIB information session, luncheon and events that featured both Congressman Tierney and Congresswoman Tsongas. They happened in the City of Lawrence, the seat of the MVWIB.
- Chairman Bevilacqua is a member Commonwealth's SESP committee and his Chamber recently received a Federal Department of Energy Grant for area business energy assessments. He is a driving force in our WIBs connection to NEXAMP, a growing green energy company, and to twenty-four other companies located in the Merrimack Valley.
- Peter Matthews, a representative from the private industry sector, chairs the Planning Committee and acts as Vice-Chairman. He and other chair-people help prepare committee agendas for the quarterly board meetings.
- Youth Council agendas are prepared by the Youth Council Chair and staff manager to reflect past discussions and new developments.
- All committee chairs run their committees and each describes their committee activities and decisions to the general membership at MVWIB's quarterly meetings.
- Eighteen board members attended and actively participated in Regional Workforce Summits. They were instrumental in developing our manufacturing industry focus and in preparing us for interstate manufacturing partnerships via our RIGG plan.
- Three board members agreed to participate on the advisory board of the Northeastern Massachusetts Customized Manufacturing Partnership.
- In addition, Kim Abare, President of New England Die Cutting and WIB member is a partner on the Older Workers' Retention Grant.
- Eleven board members agreed to be on the High Performing WIB Advisory Board. Information and progress on the High Performing WIB Initiative has been presented to the Planning Committee on a monthly basis and to the full board every quarter for their input and advice.
- Paul Durant, President of Techprint, Inc. and WIB member agreed to be an employer partner on the EX-offender Re-entry Grant.
- There is now an Executive Committee to drive strategic goals. The Executive Committee has also assumed the responsibility of being the MVWIB Education Committee to clarify MVWIB policies and practices during these difficult economic times. As reflected in Executive Committee minutes, the Education Committee supplants the Advocacy Committee that is now abolished.

- All Committee Chairs come from the private sector. Committee chair-people help develop and approve all agendas.
- But for the executive director report, board members present each agenda topic.

C. Describe the Board CQI process for its own activities. (Question 18)

MVWIB Response:

The Executive Committee that was formed last year is responsible for Board CQI activities. They utilize and amend the scorecard and other tools as necessary toward that end. The Executive Committee tasks the Executive Director and his staff to update or prepare tools and informational packets for their review, amendment and approval as questions and issues arise.

Executive Director performance will sometimes be assessed by how he addresses issues before they arise as significant ones. It should be noted that both the Planning and Youth Council Chairs are Executive Committee members alongside the MVWIB and Nominating Committee Chairs. They all have direct connections to the full board membership.

Using information related to our scorecard, dashboard and ITA tracking tools, monthly Planning Committee meetings will also serve to track and measure MVWIB success in achieving the goals outlined in our plan. This committee is key in utilizing evaluation information to drive strategic planning.

Earlier in our HPWIB submission process, the Planning Committee made key decisions regarding the use of ARRA funds to support group training initiatives and in prioritizing the key sectors. It also approved the development and official request for a waiver for customized training employer contributions. The Planning Committee directed the analysis and made the change recommendation before they were moved to the full, quarterly Board meeting for final approval.

Executive Committee members always report progress to the full Board at quarterly, general membership Board meetings. The Planning Committee consists of a Chair and eight other MVWIB members, all of whom are currently from the private sector. They are especially well positioned to measure per MVWIB performance against regional employer need.

This year, the Planning Committee was joined by four new private sector Board members. They and other members recently both recommended and approved the Youth Council recommendation to expand the youth eligibility criteria for access to education and training. It accepted adding additional barriers for youth training eligibility – an issue that will soon be presented for full board approval at the next quarterly meeting. All of the additional eligibility barriers had previously been CommCorp and DCS accepted at several other Massachusetts Workforce Investment Board regions.

Financial Resources

- *Develop a Revenue Plan that reflects the region's strategic plan goals and identified labor market solutions. Build a chart or tool that shows the major goals for the Board, the existing resources to support those goals, the needed resources and the fundraising activities to address gaps.*
- *Please describe how the Board will review progress on its Revenue Plan and how the Board will track the "return" on the staffing or financial investments made in its activities (Question 27)?*

MVWIB Response-

The MVWIB Revenue Plan that was previously submitted outlines the Strategic Objectives and Existing Resources currently available to the WIB, the impact of funding shortfalls in achieving our strategic objectives, potential resources for addressing the funding gaps and the methodology that will be used to measure progress in increasing funding and additional workforce system resource collaborations. Progress will be reviewed by the Board at least semi-annually. It will be updated annually to reflect shifts in emphases and focus as appropriate.

Closing Comments:

As previously described and evidenced within this response, throughout the High Performing WIB process, the MVWIB looked for opportunities to collaborate and develop programs and projects in support of the goals outlined in our Strategic Plan. Successful proposals have been submitted to federal and state funding sources focused on additional healthcare, green energy and manufacturing training options.

The MVWIB itself has gone through a restructuring both at the Board level reestablishing the Executive Committee and creating an Education Committee, and at a functional and operational level with the realignment of roles and responsibilities between the MVWIB, the WIA Grant recipient, the City of Lawrence, and the ValleyWorks Career Center.

During this transition, the performance of the region in achieving performance goals and objectives has remained among the highest in the State. The new MVWIB CEO has shown an intense interest in the successful implementation of youth employment skill training and the MVWIB Chairman has again been successful in highlighting the Commonwealth's Workforce Investment Board efforts. The MVWIB is now positioned to be even better in the future.

We look forward to your approval of our High Performing WIB application. With approval, the Merrimack Valley Workforce Investment Board and its partners will focus our joint attention on more quickly implementing, regularly analyzing and improving upon the strategies, goals and objectives here planned and in the process of being carried out.

***Merrimack Valley Workforce Investment Board
Revenue Plan***

Strategic Objectives	Existing Resources	Shortfall	Potential Resources	Measuring Success
Building Capacity: Building the competitive workforce advantage of the Merrimack Valley region in key and emerging sectors	<ul style="list-style-type: none"> • Pathways Grant • Ex-Offender Grant • WIA • DTA • Wagner-Peyser • NEG/TAA • WTF • Older Workers Grant • Regional Innovation Grant • Learn at Work Grant 	<ul style="list-style-type: none"> • Lack of unrestricted funding • Lack of additional funding for MVWIB and VWCC staff • Inadequate cost/time in-house systems analysis • Customer eligibility barriers • Limited availability of workforce education funds 	<ul style="list-style-type: none"> • Commonwealth Corp WCTF Sector Initiatives • Dept of Youth Services • Dept of Social Services • Connecting Activities • Dept of Education • Potential ARRA \$ • Utilization of apprenticeship programs • English Works Campaign • Increase Pell Grant Activity participation • Other private foundation grants • Other private corporate grants • Leveraged private sector resources 	<ul style="list-style-type: none"> • More efficient use of resources i.e. reducing number of customer visits needed for training referral • Semi-annual scorecard review by Board including Executive and Planning Committees • Increased number of customers entering training • Increased collaborations resulting in additional grant awards
Closing the Skills Gap: Resources aligned with employer and job seeker needs to meet skill requirements in key sectors: <ul style="list-style-type: none"> • Health Care • Manufacturing • Life Sciences • Green Jobs 	<ul style="list-style-type: none"> • State Energy Sector Partnership Grant • Healthcare Skills Gap Grant • ARRA Group Training Programs • OJT's (WIA/ARRA) • Customized Training (ARRA) 	<ul style="list-style-type: none"> • 9-C WTF Budget Cuts • Lack of dedicated employer-funded grant availability • Lack of incumbent worker initiatives 	<ul style="list-style-type: none"> • Employment Partnership Grant • Submit grant applications to: <ul style="list-style-type: none"> -Public/Private Ventures -Corp for Skilled Workforce • US Depts of Labor, Energy, Education and Commerce, NIH • WIA, EOLWD and DWD • Collaborate with other WIBs on regional sector grants • Budget Line Item • State and Regional grants • Mass Clean Energy Center • Other private corporate and foundation grants 	<ul style="list-style-type: none"> • Development of at least two new sector based training programs in response to employer-driven demand • Semi-annual scorecard review by Board including Executive and Planning Committees • New marketability criteria put in place to facilitate more effective use of training funds.

***Merrimack Valley Workforce Investment Board
Revenue Plan***

Strategic Objectives	Existing Resources	Shortfall	Potential Resources	Measuring Success
Promote and support activities that will retain or expand employment opportunities for targeted populations: <ul style="list-style-type: none"> •Older workers •Ex-offenders •People with disabilities •Others with barriers to employment 	<ul style="list-style-type: none"> • WIA • ARRA • Older Workers Grant • Ex-offenders Grant 	<ul style="list-style-type: none"> • Lack of grant funding at the State and Federal levels 	<ul style="list-style-type: none"> • Private foundation grants • Outreach and performance assessment • Commonwealth Corporation • DESE 	<ul style="list-style-type: none"> • Scorecard Review • Increased grant applications for target populations
Increase basic skills of incumbent workers in need of ABE/ESOL to enhance career ladder opportunities	<ul style="list-style-type: none"> • WTF • Healthcare Skills Gap Grant • Learn at Work Grant • State Energy Sector Partnership grant • Green Handyman Group Training Program (funded by ARRA) 	<ul style="list-style-type: none"> • Lack of non-WIA grant dollars coming into the area • Sector-specific workforce development allocations 	<ul style="list-style-type: none"> • Potential funding through private foundations, ie., Robert Wood Johnson, John A. Hartford, Hitachi “Jobs to Careers”, Bayer USA, Gates Foundation • WTF • DOL RIG • TAA • NEG • DESE 	<ul style="list-style-type: none"> • Scorecard review • Increased WTF applications providing ABE/ESOL training

Merrimack Valley Workforce Investment Board Revenue Plan - Youth

Strategic Objectives	Existing Resources	Shortfall	Potential Resources	Measuring Success
Enhancing the Youth Pipeline: Supporting the development of a pipeline for youth in Merrimack Valley key labor market sectors	<p>Funding:</p> <ul style="list-style-type: none"> • WIA Youth • YouthWorks • Pathways to MCAS Success • Connecting Activities • Private sector match <p>Placements:</p> <ul style="list-style-type: none"> • Private Sector • Public Sector • Non-profit <p>Partners:</p> <ul style="list-style-type: none"> • DWD • DESE • Employers • Municipalities • CommCorp • High Schools • Two-and four-year colleges • Youth Council members • Training Vendors • Other WIBS • Other Youth serving organizations 	<p>Loss of funding:</p> <ul style="list-style-type: none"> • ARRA • P21 <p>Reduction in Funding:</p> <ul style="list-style-type: none"> • YouthWorks • Connecting Activities <ul style="list-style-type: none"> • Need more unrestricted funding for non-eligible youth <ul style="list-style-type: none"> • Many appropriate youth-serving agencies /partnerships fail to apply for MVWIB funding due to strict requirements and cumbersome youth eligibility process <ul style="list-style-type: none"> • Lack of training in the MVWIB area for some critical industries <ul style="list-style-type: none"> • Need for more employer support 	<ul style="list-style-type: none"> • MVWIB-leveraged relationships between appropriate youth-serving agencies, high schools, and two-and four-year colleges • Private sector representation on the Youth Council • Private sector financed teacher externships • Private sector financed internships • Funding through private foundations, e.g., national youth- serving organizations; STEM organizations • NECC, technical school, and employer partnership to develop new training venues for critical industries • Collaborations with other WIBs in creating and sustaining cross regional programs through additional grant applications • Job Corps, US DOJ, MA District Attorney's Office, MA DYS, Other Public Safety Donors 	<ul style="list-style-type: none"> • Ten percent (10%) annual increases in sector partnerships providing successful training programs to youth • Monthly Youth Council meetings with quarterly use of Scorecard for performance assessment, risk identification and mitigation, and issue resolution • Increased business participation by \$10K per year through private payment externships • Increase in private sector-financed internships by 10% per year • New programs for youth in critical industries • Increase in collaborations with other WIBs in creating and sustaining cross-regional programs • Increase in private funds for training programs

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD STRATEGIC PLAN PERFORMANCE SCORECARD

Priorities	Time Frame	Status	Healthcare Sector	Time Frame	Status	Manufacturing (traditional and advanced), Green Jobs, and Life Sciences
Priority 1: Building Capacity-Building the competitive workforce advantage of the Merrimack Valley region in key sectors.						
A. Build the capacity and effectiveness of the WIB and Youth Council as a primary convenor and resource for labor market information and workforce development activities in the region..	7/09-6/12	Complete Actively recruiting members from AHEC Advisory Board, expect appointment in October, 2010.	<ul style="list-style-type: none"> ◆ Maintain active participation of WIB members from healthcare sector. ◆ Add healthcare employer to Youth Council 	7/09-6/12	Complete for 2009 & 2010	<ul style="list-style-type: none"> ◆ Add one new WIB member from manufacturing, green jobs or life science sector each year
B. Increase linkages between sector employers, higher education, training providers, and career centers	7/09-6/12		<ul style="list-style-type: none"> ◆ Establish and convene Regional Healthcare Planning Group with healthcare providers, community colleges, education and training providers, and career centers. 	7/10-6/12		<ul style="list-style-type: none"> ◆ Utilize RIG Merrimack Valley Manufacturing Advocate (MVMA) sub-committee forum to explore development of pipeline activities that increase interest and awareness of career opportunities in manufacturing.
	7/09-6/12	Complete for 2009	<ul style="list-style-type: none"> ◆ Convene annual vendor meeting to highlight healthcare training gaps and encourage corresponding course development 	7/09-6/12	Complete for 2009	<ul style="list-style-type: none"> ◆ Convene annual vendor meeting to highlight needed occupational training to fill skill gaps and encourage corresponding course development .
	7/10-6/12	Complete for 2010	<ul style="list-style-type: none"> ◆ Collaborate in the development of training curricula, articulation of career ladders, and design of staff development curricula. ◆ Create a sequential training model for applications to major funding sources 	7/10-6/12		<ul style="list-style-type: none"> ◆ Focus youth education/skill programs on identification and acquisition of STEM skills needed for careers manufacturing, green jobs and life sciences.
	7/10-6/12	Exceeded goal for 2010, almost doubling number of critical & emerging industries utilizing career center services.	<ul style="list-style-type: none"> ◆ Increase number of critical and emerging industries utilizing Career Center services by 5% each year 	7/10-6/11	Survey conducted by Board member, Mike Munday to area manufacturing companies to identify job openings and training needs. Completed in September, 2010	<ul style="list-style-type: none"> ◆ Develop and implement one or more manufacturing-based projects in region
				7/10-6/12	Exceeded goal for 2010, almost doubling number of critical & emerging industries utilizing career center services.	<ul style="list-style-type: none"> ◆ Develop and execute at least one new cross regional partnership activity through MVMA group ◆ Collaborate with employers and education and training partners in the development of training curricula, articulation of career ladders, and design of staff development curricula for sectors.
				7/10-6/12	Complete for manufacturing in 2010.	<ul style="list-style-type: none"> ◆ Increase number of critical & emerging industries utilizing Career Center services by 5% each year. ◆ Increase number of OJT's in each industry each year

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD STRATEGIC PLAN PERFORMANCE SCORECARD

C. Expand visibility of MVWIB as community resource for students, parents, and educational institutions.	7/09-6/12		<ul style="list-style-type: none"> Host annual Healthcare Career Awareness Community Forum for students, parents, teachers, and guidance counselors 	7/09-6/12		<ul style="list-style-type: none"> Host "Preparing for the 21st Century", Career Awareness Community Forum for students, parents, teachers, and guidance counselors focusing on STEM occupations.
--	-----------	--	--	-----------	--	---

Priorities	Time Frame	Status	Healthcare Sector	Time Frame	Status	Manufacturing (traditional and advanced), Green Jobs, and Life Sciences
Priority 2: Closing the Skills Gap-Resources aligned with employer and job seeker needs to meet skill requirements in key sectors						
A. Continue work with sector partner teams to build career ladders	7/09-6/12	In process	<ul style="list-style-type: none"> Utilize Healthcare Planning group to develop plan to create career ladder in key healthcare sector identifying steps, required education and training and potential funding sources and timeframe for each step. Continue work on identifying other healthcare training needs, identifying potential funding sources, preparing grant proposals 	7/09-6/11	In process	<ul style="list-style-type: none"> Utilizing MVMA education and training committee Identify career ladder with associated education and training requirements for each step. Identify potential fundings sources and timeframe for sector initiative Disseminate information on career ladders/best practices to broader education/training community
	4/10-6/12	In process	<ul style="list-style-type: none"> ARRA Commcorp funded WIB Partnership grant with NECC for enhanced CNA training with focus on geriatrics and customer service. 			
B. Provide education and training targeted to job seekers with barriers to employment, including ex-offenders, older workers and those in need of remediation/English skills	7/10-6/11	Currently working with AHEC partners to assist with an application for WTF funds for ESOL training for partnering healthcare facilities.	<ul style="list-style-type: none"> Develop an ESOL/ABE program in at least one healthcare facility each year for incumbent workers. 	4/10-6/12		<ul style="list-style-type: none"> Develop and implement a vocational ESOL/ABE/occupational skills program in conjunction with employers, DESE education providers, and skills training providers, e.g., in a manufacturing environment.
	4/10-6/11			4/10-6/11	Complete	<ul style="list-style-type: none"> Implement Green Handyman training program with International Institute for 15 adults needing remediation in English and math.
		In process	<ul style="list-style-type: none"> "Bridge to Allied Health Careers" tAcademic remediation for incumbent workers in healthcare field program funded by Commcorp in partnership with Northern Essex CC. Increase number of successful transfers from ABE/ESOL programs to WIB funded ITA's or training in healthcare field by 5% each year. 		In process	<ul style="list-style-type: none"> Identify and engage employers (thru ex-offenders grant) willing to hire ex-offenders.
C. Increase training opportunities in priority sectors					A two-way mentoring program was implemented at New England Die Cutting in Haverhill, MA.	<ul style="list-style-type: none"> Implementation of older worker retention strategies developed thru the Commcorp funded Older Worker Retention Strategies Grant.

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD STRATEGIC PLAN PERFORMANCE SCORECARD

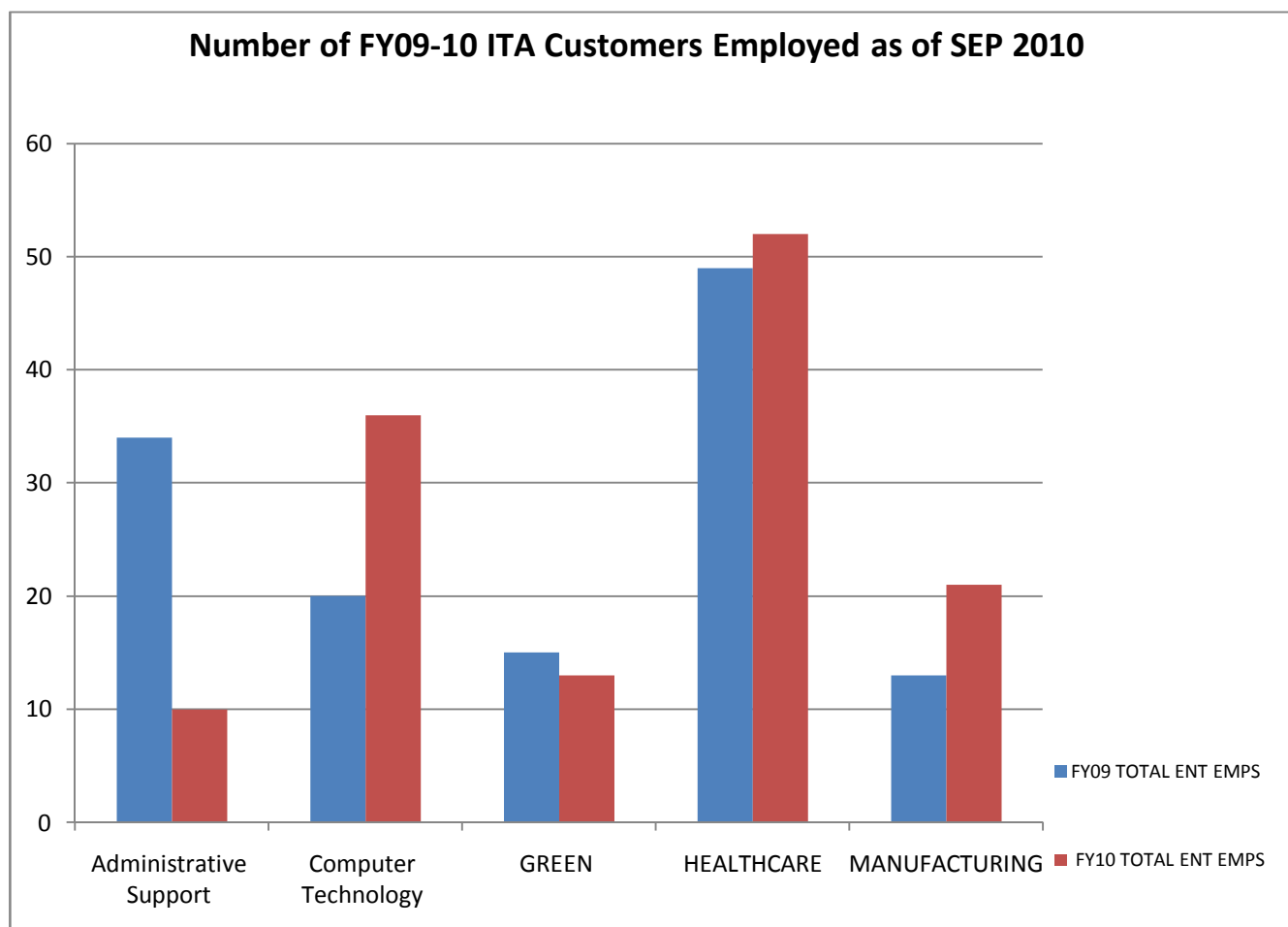
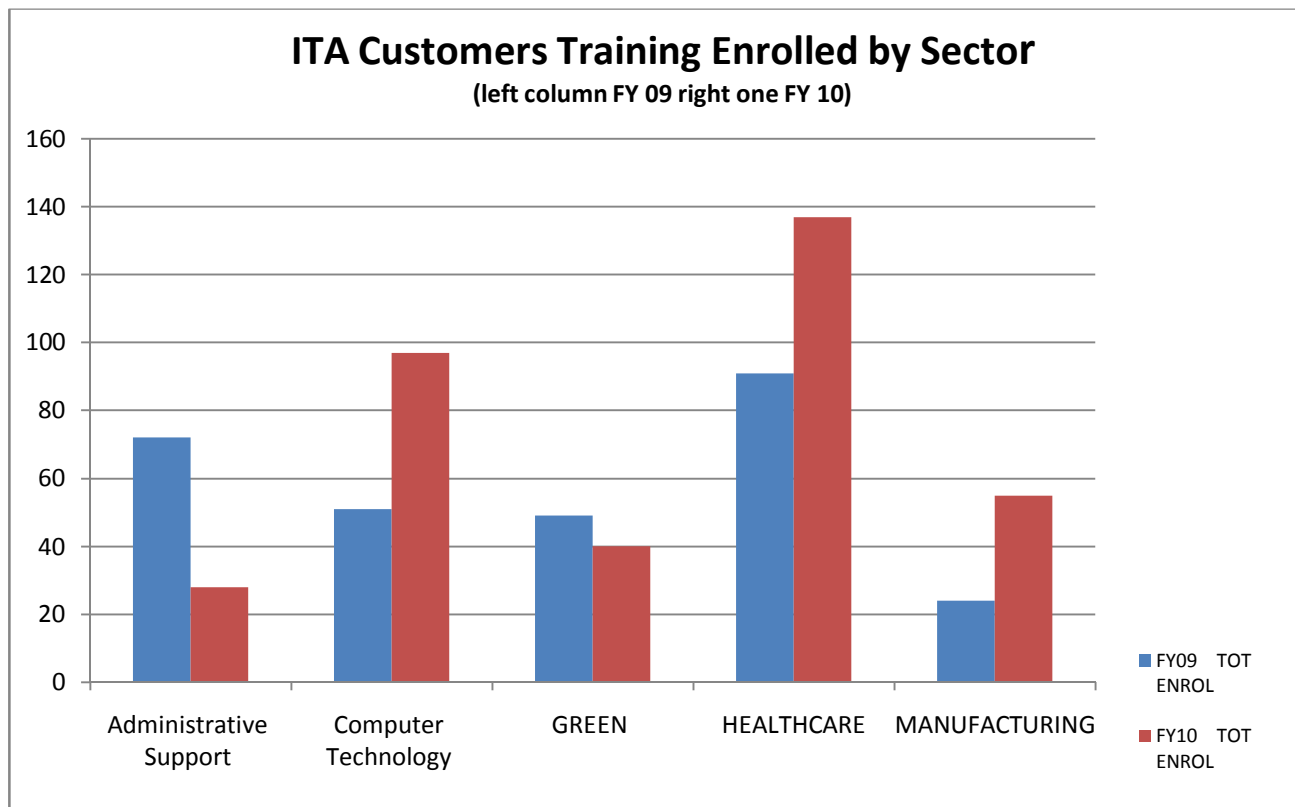
		Complete, 2010	<ul style="list-style-type: none"> Implementation of older worker retention strategies developed thru the Commcorp funded Older Worker Retention Strategies Grant and a previously funded ECCLI Grant. 			
	4/10-6/12	Complete	<ul style="list-style-type: none"> Increase healthcare training programs on Approved ITA Provider list by 10% 	7/10-6/12	Complete	<ul style="list-style-type: none"> Increase sector training programs on Approved ITA Provider list by 10% Increase successful WTF projects in manufacturing/green jobs/life sciences sector each year. Add at least one customized training project for manufacturing each year. Increase OJTs in manufacturing by 5% each year
		Complete for 2010	<ul style="list-style-type: none"> Identify and develop or collaborate in at least one proposal each year in identified growth area in healthcare field. 		Complete for 2010	
		In process	<p>Through ARRA Funding:</p> <ul style="list-style-type: none"> Implement EMT Training for 30 older youth and adults Implement Pharmacy Tech Training for 30 older youth and adults 		In process	<p>Through ARRA Funding:</p> <ul style="list-style-type: none"> Implement CNC program (manufacturing) for 24 older youth and adults Implement Green Handyman Training (Green Jobs) for 15 adults with extremely low English and math skills
					In process	

MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD STRATEGIC PLAN PERFORMANCE SCORECARD

Priorities	Time Frame	Status	Healthcare Sector	Time Frame	Status	Manufacturing (traditional and advanced), Green Jobs, and Life Sciences
Priority 3: Enhancing the Youth Pipeline: Supporting the development of a pipeline for youth in the key labor market sectors						
A. Ensure that youth internships and jobs are developed in priority industries	7/09-6/12	In process Complete 2010 and in process for 2011	<ul style="list-style-type: none"> ◆ Increase the number of youth in healthcare-related jobs by 5% each year. ◆ Increase the number of Connecting Activities internships in healthcare by 10% each year. ◆ MVWIB-funded youth programs will include healthcare career awareness information. 	7/10-6/12	In process	<ul style="list-style-type: none"> ◆ Increase the number of youth in manufacturing and/or green jobs by 5% each year. ◆ Increase the number of summer jobs/Connecting Activities internships in manufacturing industries by 10% each year ◆ MVWIB-funded youth programs will include manufacturing career awareness information. (Green Jobs, Life Sciences, Advanced Manufacturing, Machining, etc.)
B. Increase training options for out-of-school youth	7/10-6/12	Ongoing 2010 Youth are pursuing adult ITA and group training. With 501©(3) we can pursue new grants.	<ul style="list-style-type: none"> ◆ Increase percentage of slots in healthcare group training and ITAs for youth by a minimum of 5% each year. ◆ Adapt adult training models for youth populations as appropriate. ◆ Identify new funding sources and develop proposals for new programs. 	7/10-6/12	Ongoing 2010 and Youth are pursuing adult ITA training. With 501©(3) we can pursue new grants.	<ul style="list-style-type: none"> ◆ Increase percentage of slots in manufacturing sector training/ITAs for youth by a minimum of 5% each year. ◆ Work with employers, NECC and high schools to develop new manufacturing training venues in the Merrimack Valley. ◆ Identify funding sources and develop proposals for new programs.
C. MVWIB-issued youth RFPs will require linkage to an educational provider for youth without a high school degree or GED	7/09-6/12	Complete for 2009 and ongoing	<ul style="list-style-type: none"> ◆ Increase percentage of youth obtaining GED/HSD by 5% each year to allow them to pursue healthcare careers and training. 	7/09-6/12	Complete for 2009 and ongoing	<ul style="list-style-type: none"> ◆ Increase percentage of youth obtaining GED/HSD by 5% each to allow them to pursue life sciences careers and training.
D. Develop mentoring/tutoring model or program component for out-of-school youth	1/11-6/12	Will begin in January	<ul style="list-style-type: none"> ◆ Research and identify best practice models and requirements. ◆ Provide technical assistance and information about mentoring/tutoring to training providers and employers. ◆ Recruit healthcare employer mentors. 	1/11-6/12	Will begin in January	<ul style="list-style-type: none"> ◆ Explore and establish at least one manufacturing project for youth and employers (Dream It do IT campaign from NMTA, Robotics Competition, etc). ◆ Provide technical assistance and information about mentoring/tutoring to training providers and employers. ◆ Recruit green/manufacturing employer mentors.
E. Support the development of gender neutral programs in key sectors	7/10-6/12	In process Ed and EMT programs	<ul style="list-style-type: none"> ◆ Increase male enrollment in healthcare-related training by 10% each year 	7/10-6/12	In process and ongoing.	<ul style="list-style-type: none"> ◆ Increase percentage of female participants in manufacturing, green jobs, life science programs by 10% each year ◆ Increase OSY male enrollment in MVWIB-funded training by 25% each year.

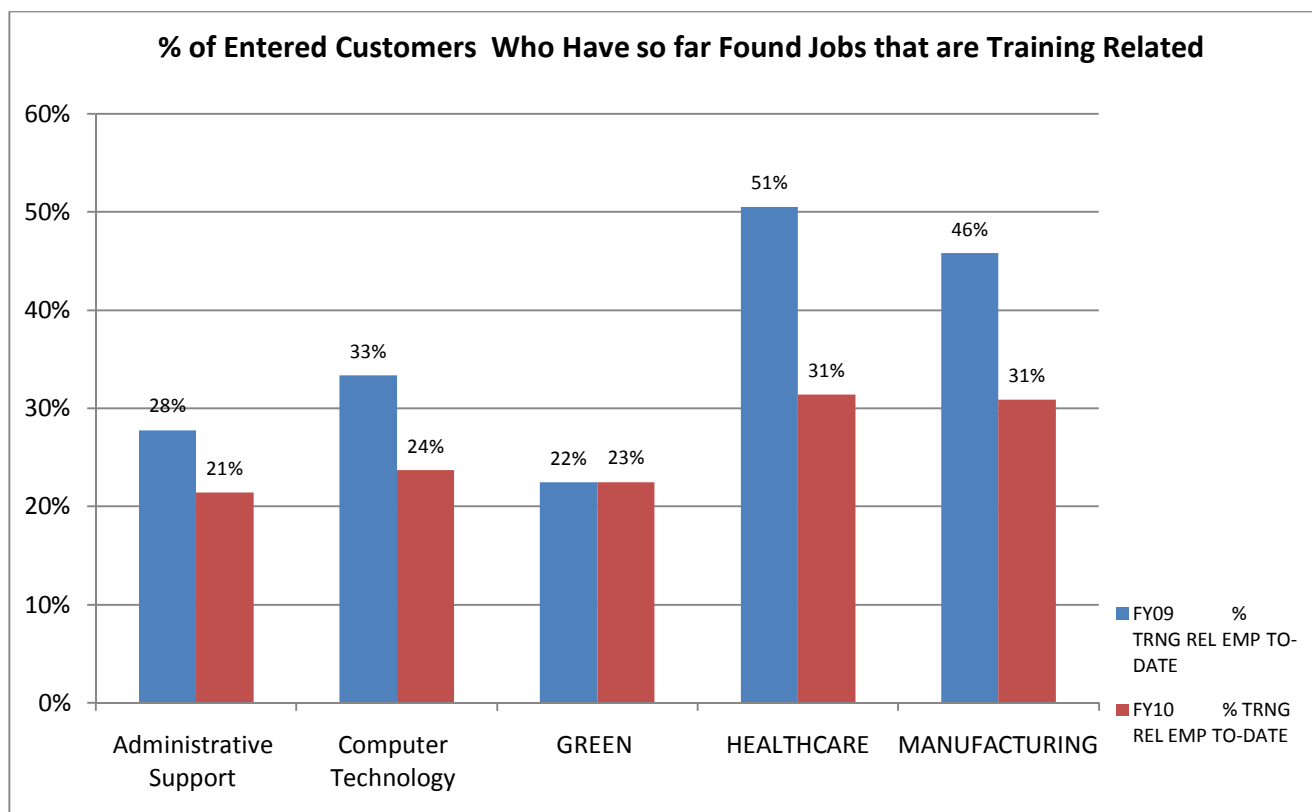
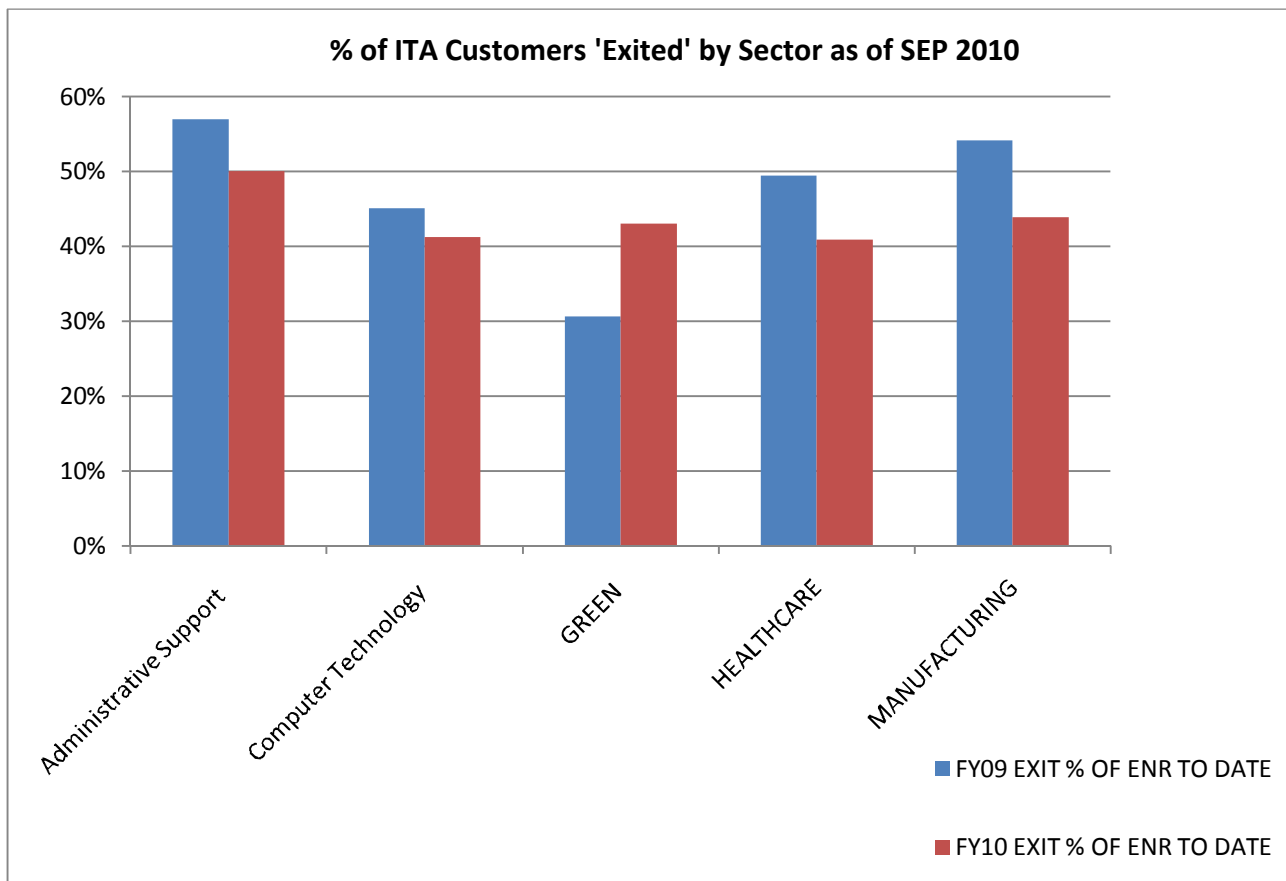
Merrimack Valley Workforce Investment Board

Individual Training Accounts Tracking Tool pg 1



Merrimack Valley Workforce Investment Board

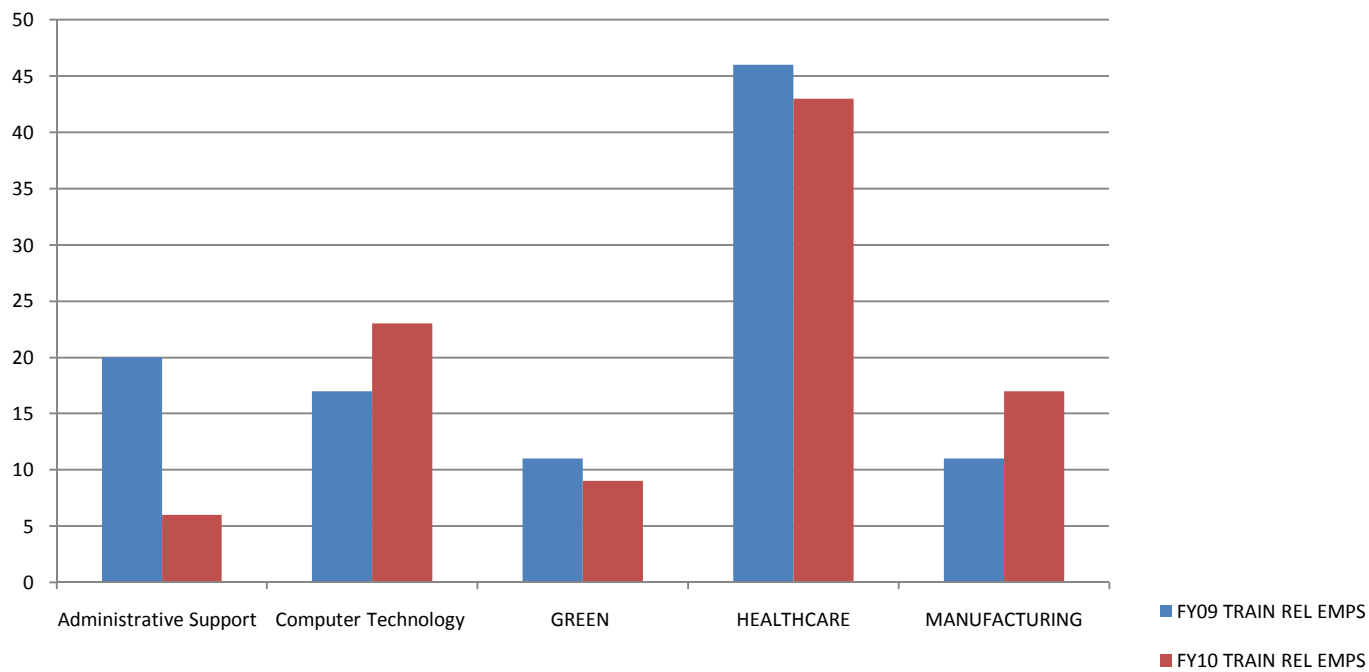
Individual Training Accounts Tracking Tool pg 2



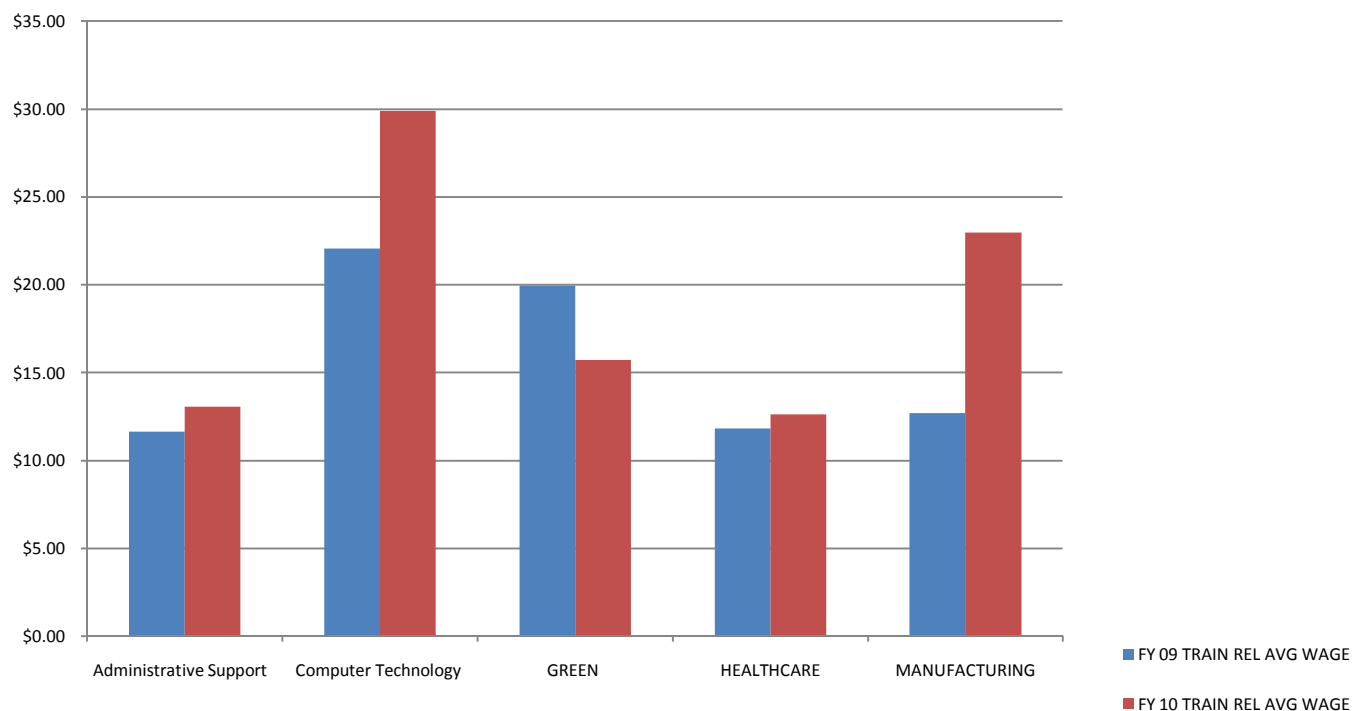
Merrimack Valley Workforce Investment Board

Individual Training Accounts Tracking Tool pg 3

Number of FY09-10 ITA Customers with Training-Related Jobs



Training-Related Average Wages



MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD
FY 2010 YEARD END SUMMARY
(July 1, 2009 - June 30, 2010)

TOTAL FUNDING **\$9,992,463**

Unemployment Rate: **10.10%**

JOB SEEKERS INFORMATION

**Total Customers
Served**
14,152
91% of Plan

**Customers Served
with Disabilities**
723
93% of Plan

**Unemployment
Insurance Claimants**
7,471
91% of Plan

**Veterans
Served**
1,149
124% of Plan

**Total Job Seeker
Unemployed**
13,275
94% of Total
Customers Served

**Total Staff Reportable
Job Placements**
2,402
104% of Plan

WIA Youth Served
191
65% % of plan:

**WIA Funds
Invested in
Training:**
\$967,568

**Entered Employment
Average Wage**
\$17.84

**Youth Entered
Employment: 81**
69% of plan

**CSA
Training
Referral
Rate:** ~10%

**Average time for CSA
Training Referral:**
~ 9 weeks

**MERRIMACK VALLEY WORKFORCE INVESTMENT BOARD
FY 2010 YEARD END SUMMARY
(July 1, 2009 - June 30, 2010)**

EMPLOYERS INFORMATION

**Total Employers
Served**

1,929

168% of Plan
**Highest in the
State**

**Employer Service
Contacts**

6,923

2,546 **more
than in FY 2009**

**Employers Served
Who Were New to
Career Center**

806

230% of Plan
Highest in the State

**Employers Listing
Job Orders**

480

104% of Plan

**Employers Served
With Jobs in
Critical Industries**

729

146% of Plan

**Employers Served
With Jobs in
Emerging Industries**

113

113% of Plan

**The ValleyWorks Career Center
Operated Five (5) Job Fairs
That Attracted a Total of
Seventy (70) Employers and
2,341 Job Seekers**

**In FY 2010, ValleyWorks Career
Center Earned a Total of
\$35,679 from Enhanced
Fee Based Services**

Dashboard-J

Development Version: Crystal Reports XI, Service Pack 2. **Special Note:** *This report runs best with Crystal Reports Version XI. In earlier versions, not all chart features will work correctly, and tailoring of the report may be required--possibly each time it is run. For assistance with earlier versions, please contact the report developer. Note also that this report is intended for printing in color.*

First Issuance Date: 1/25/10.

Parameters: Location Level (Statewide All, Statewide Career Centers, Region, Career Center, Local Office), Region, Career Center, Local Office, Start Date, End Date.

Parameter List of Values Updated Date: N/A

Update of Job Placements from Wage Record Matches (every February for the previous fiscal year): N/A

Key Features: The Dashboard report shows five pages of dashboard metrics in chart form, followed by explanations of the logic underlying each chart. Each page represents a specific set of workforce development metrics, as follows (Note: the pages are not numbered so that the user can select subsets of pages to print without the appearance of "missing pages"):

- 1- **Job Seeker Customers** - Numbers served across the years; number of visits across the years; type of services provided (current year); customers served and customer visits month by month as compared to the same period in the previous year; new training enrollments (current year) - top 10 occupational categories.
- 2- **Job Seeker Characteristics** - Gender by Fiscal Year; Education Levels by Fiscal Year; Education Levels (current year); Ethnicity by Fiscal Year; Ethnicity (current year); Age by Fiscal Year.
- 3- **Job Seeker Outcomes** - Job Placements by Fiscal Year; Average Wage by Fiscal Year; Job Placements (monthly comparison to same period previous year); Job Placements - Top 10 Industry Sectors (current year); Job Placements - Top 10 Occupational Categories (current year).
- 4- **Employers** - Employers Served by Fiscal Year; Employer Service Contacts by Fiscal Year; Employer Services (current year); Employers Served (monthly YTD - this year vs. last); Employer Service Contacts (monthly YTD - this year vs. last); Job Orders and Associated Job Openings by Fiscal Year.
- 5- **Employer and Job Opening Characteristics** - Employers: Top 10 Industry Sectors (current year); Job Openings: Top 10 Occupational Categories (current year).

The report can be run all statewide offices, all career centers statewide, or for a specific region, career center, or local office.

The selected start date must always be the beginning of a fiscal year (July 1) and should allow at least one previous fiscal year to appear in addition to the current fiscal year. The selected end date should be the last date of a month (since many charts are based on date that is compiled only monthly). While the report could be run with other end dates, the chart labels would not accurately reflect the dates of the actual underlying data in some cases. Upon refreshing the report, the user will be alerted if the selected End Date is not the end of a month and told to rerun the report the correct end date.

Pop-up messages: This report is comprised of about 20 subreports, many of which use the OSCCAR Reports table, which is updated monthly. If you see repeated pop-up messages that say a table has changed and **asking whether to update the report, always say "OK"**. If you receive a pop-up message that says "cannot find" a certain table and **asks whether to remove the table from the report, always say "No."** These messages do not mean there is anything wrong with the report.

Exporting: This report may be exported to pdf format for distribution.

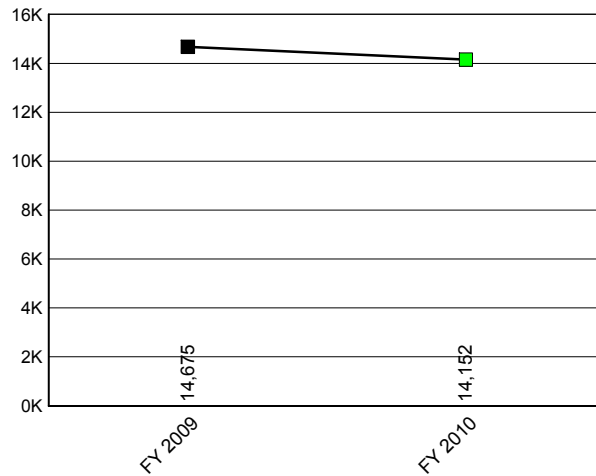
Report Run Times: About 5 to 15 minutes.

Report Feedback: This report has been tested for accuracy; however, we encourage your feedback--if you get unexpected results or have other suggestions, please contact the report developer below.

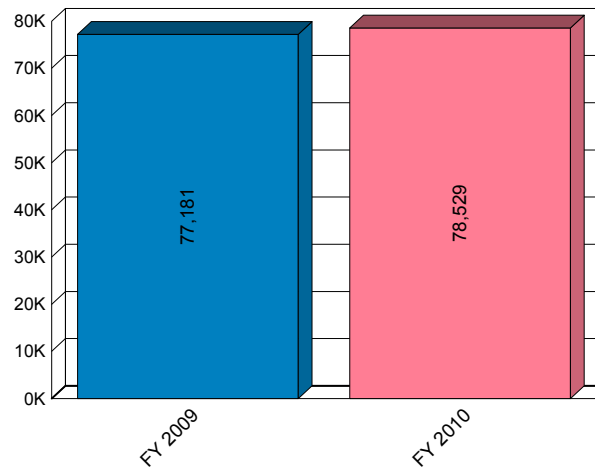
Report Developer: Linda Bass, lbass@detma.org, 617-864-1570.

Job Seeker Customers

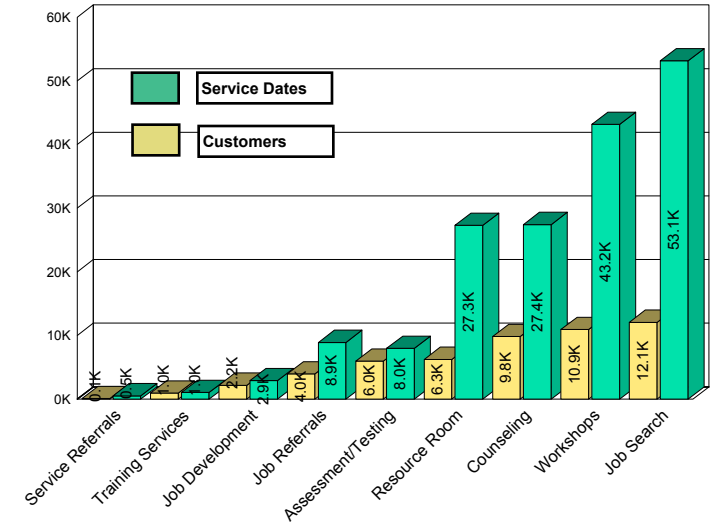
Total Customers Served



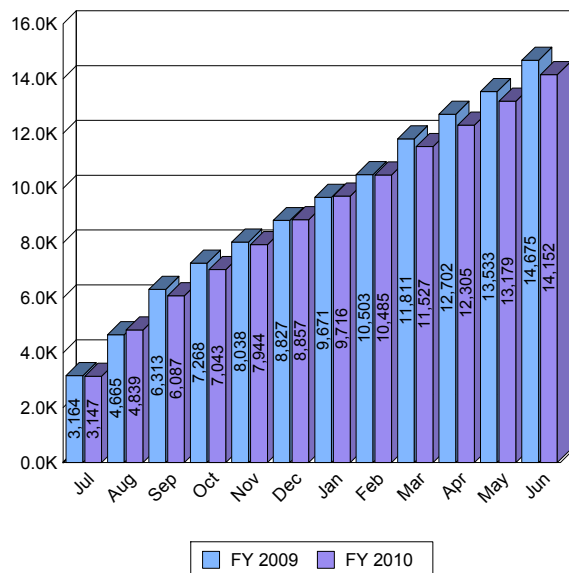
Total Customer Visits



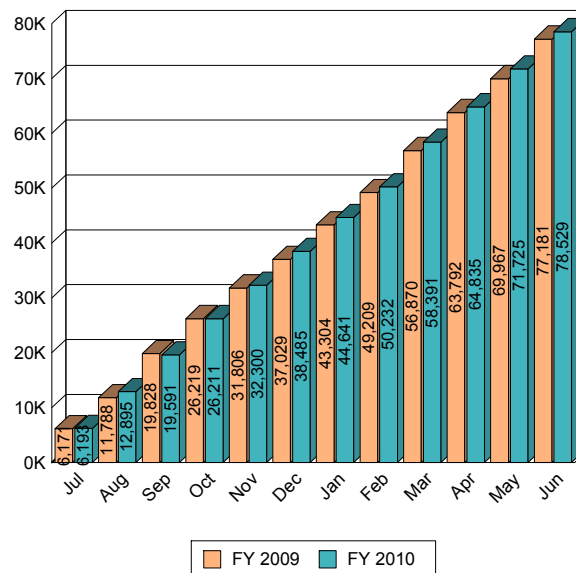
Individual Services Provided
July 01, 2009 to June 30, 2010



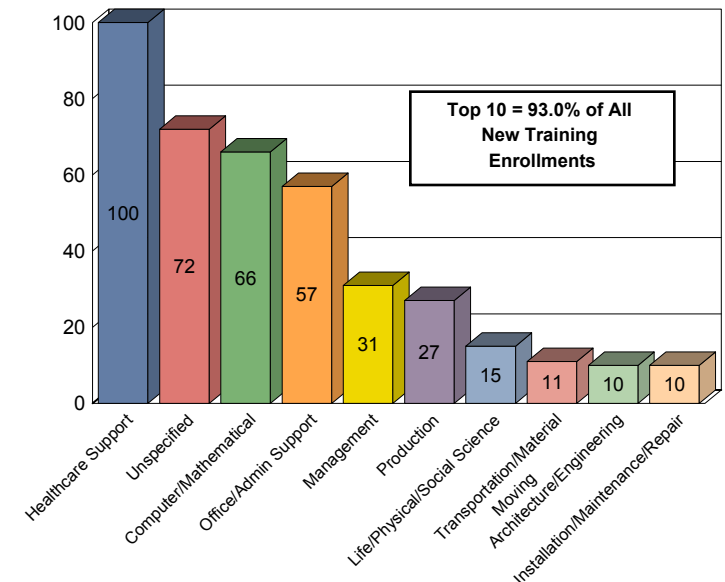
Customers Served
Monthly YTD Totals - This Year vs. Last Year



Customer Visits
Monthly YTD Visits - This Year vs. Last Year

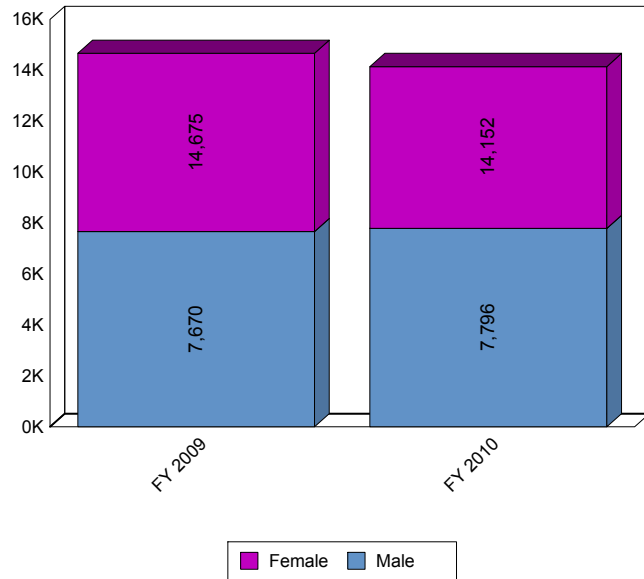


New Training Enrollments: Top 10 Occupational Categories
July 01, 2009 to June 30, 2010

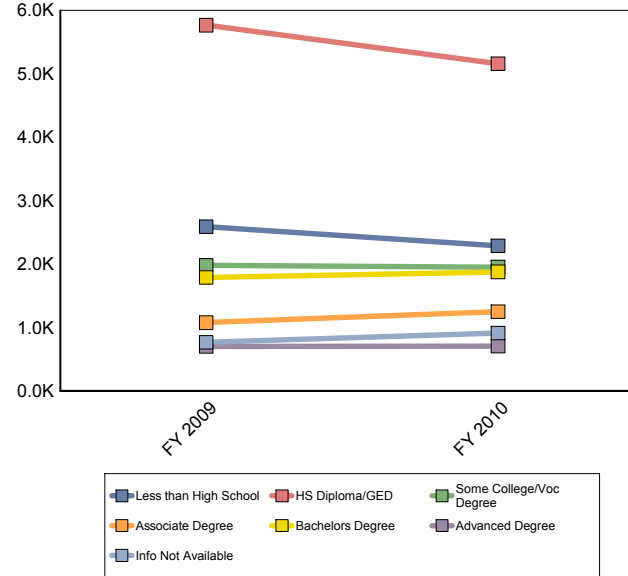


Job Seeker Characteristics

Gender by Fiscal Year

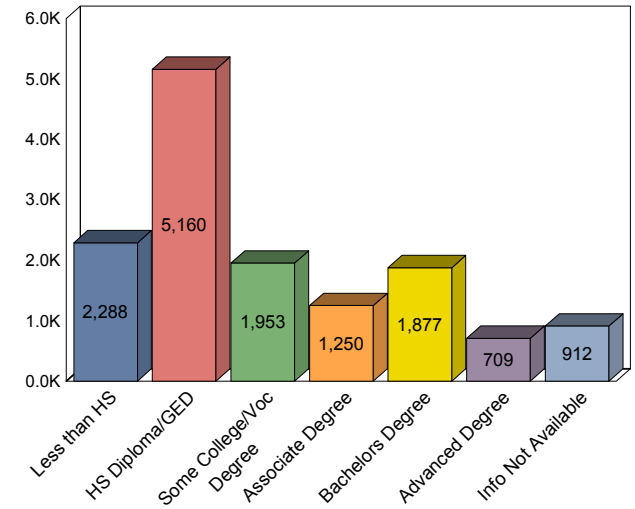


Education Levels by Fiscal Year

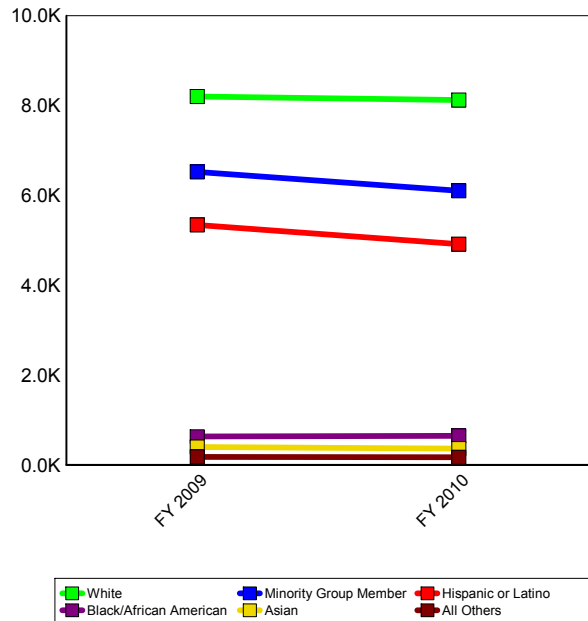


Education

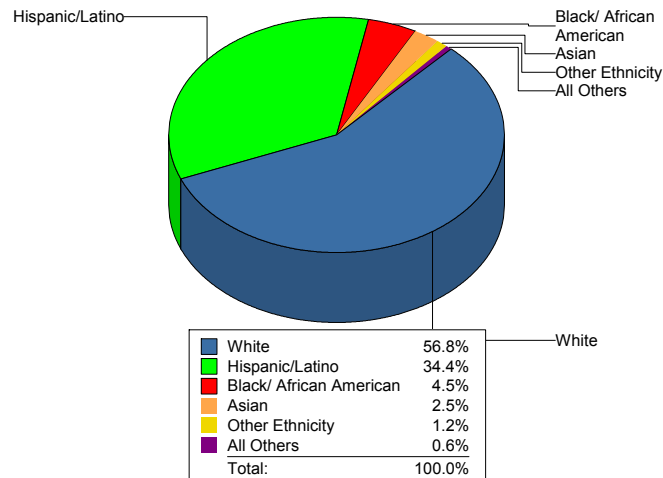
July 01, 2009 to June 30, 2010



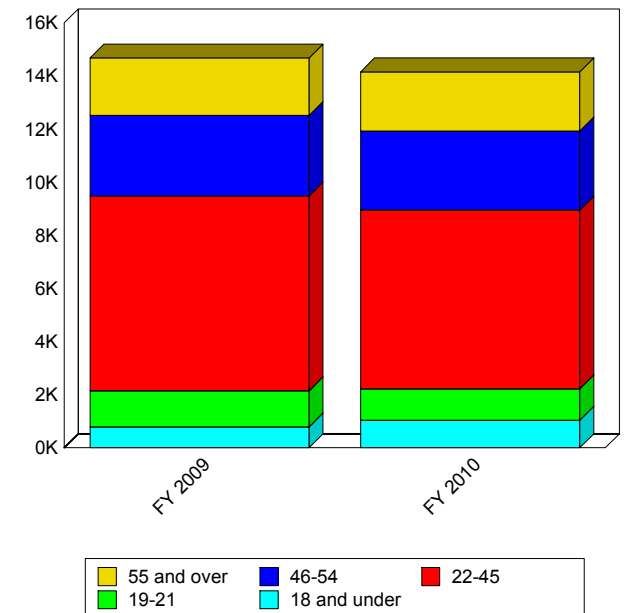
Ethnicity by Fiscal Year



Ethnicity July 01, 2009 to June 30, 2010

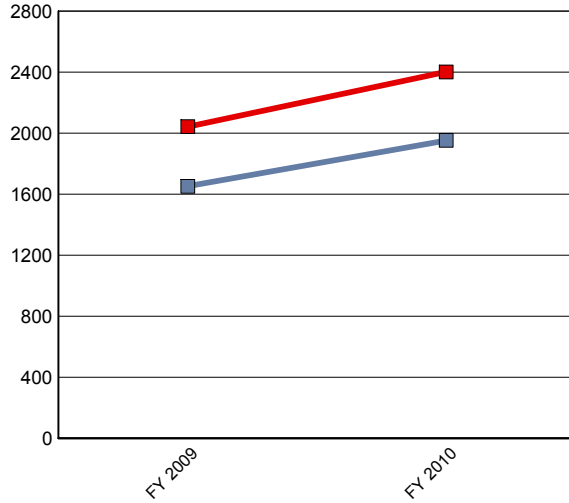


Age by Fiscal Year



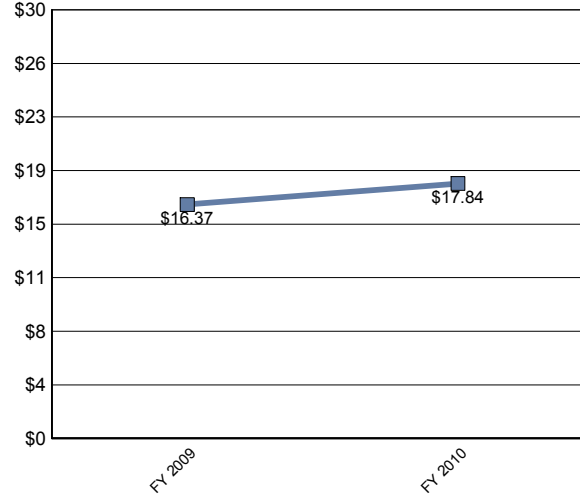
Job Seeker Outcomes

Job Placements

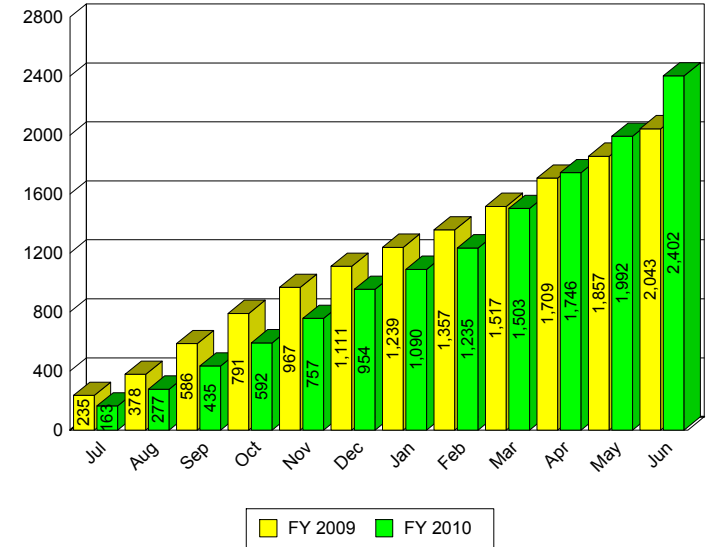


■ Job Placements - Wage Record Matches
■ Job Placements - Career Center Data
■ Full-time Jobs - Career Center Data

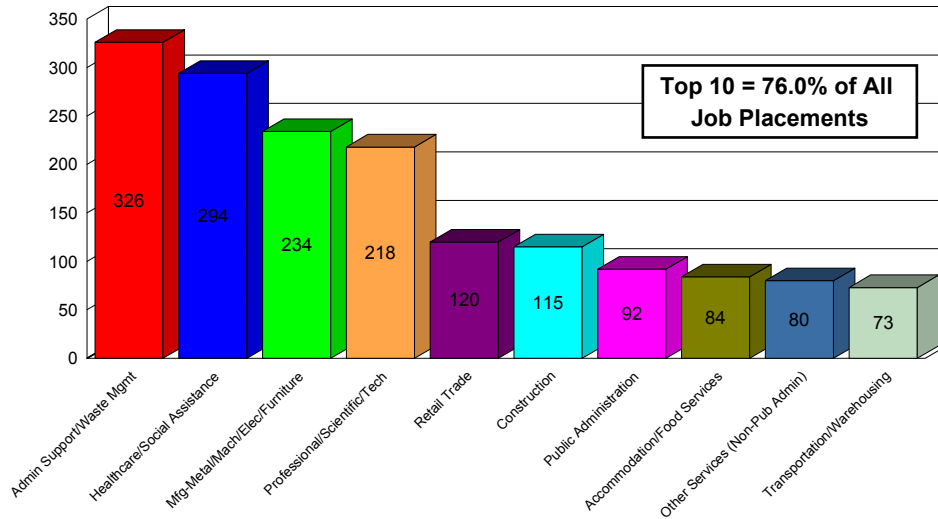
Average Wage



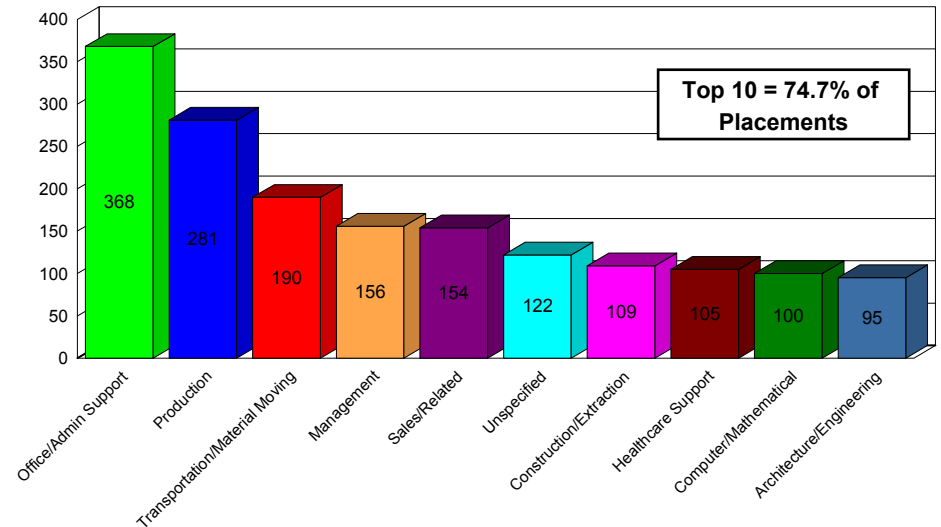
Job Placements of Individual Customers
Monthly YTD Totals - This Year vs. Last Year



Job Placements: Top 10 Industry Sectors
July 01, 2009 to June 30, 2010

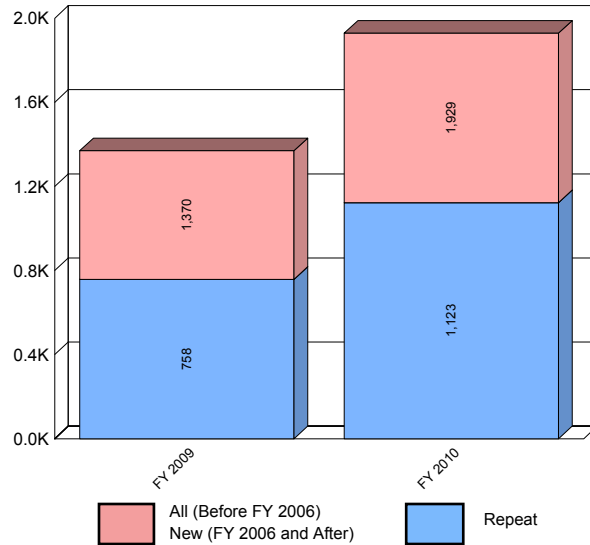


Job Placements: Top 10 Occupational Categories
July 01, 2009 to June 30, 2010

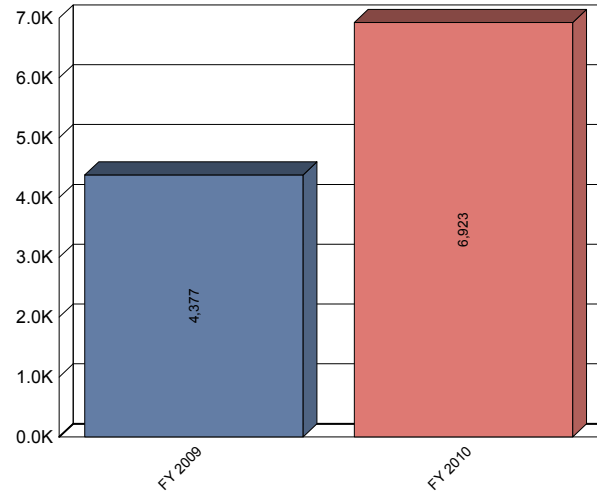


Employers

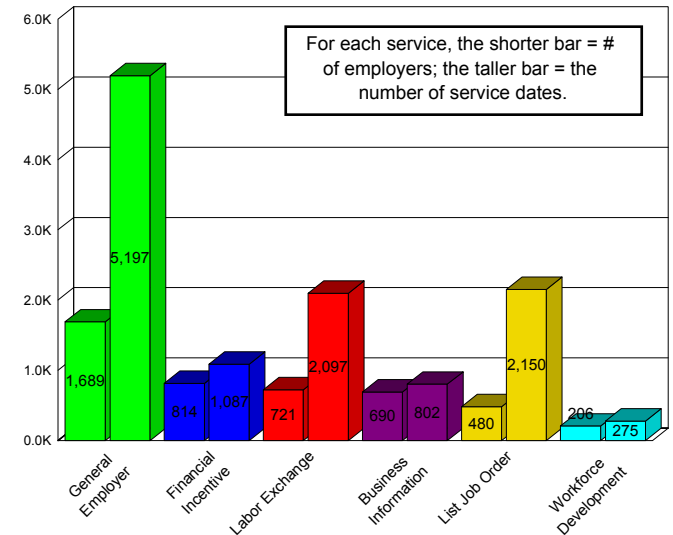
Employers Served



Employer Service Contacts

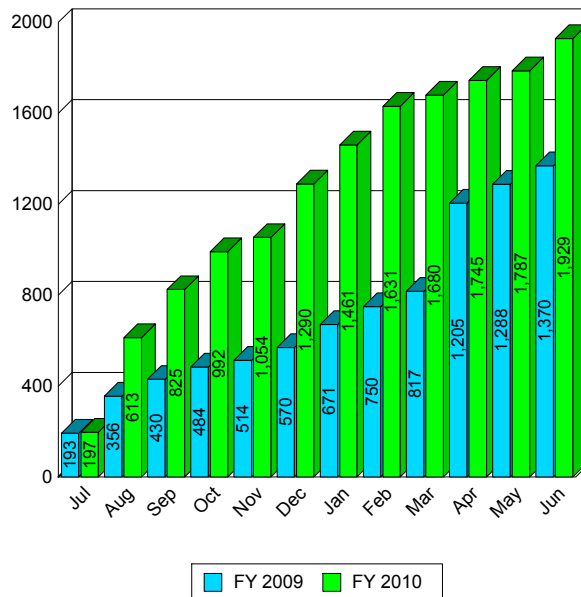


Employer Services
July 01, 2009 to June 30, 2010



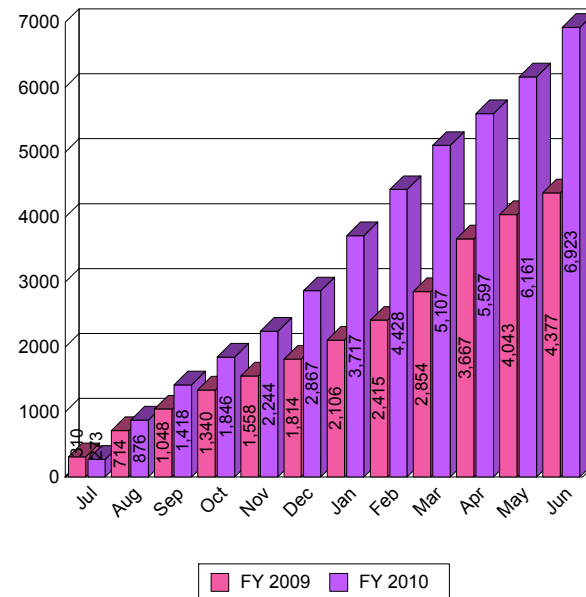
Employers Served

Monthly YTD Totals - This Year vs. Last Year

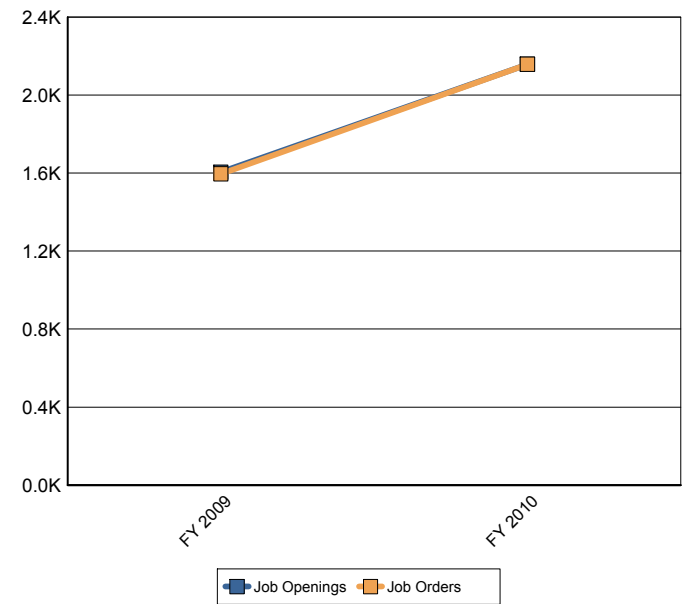


Employer Service Contacts

Monthly YTD Totals - This Year vs. Last Year



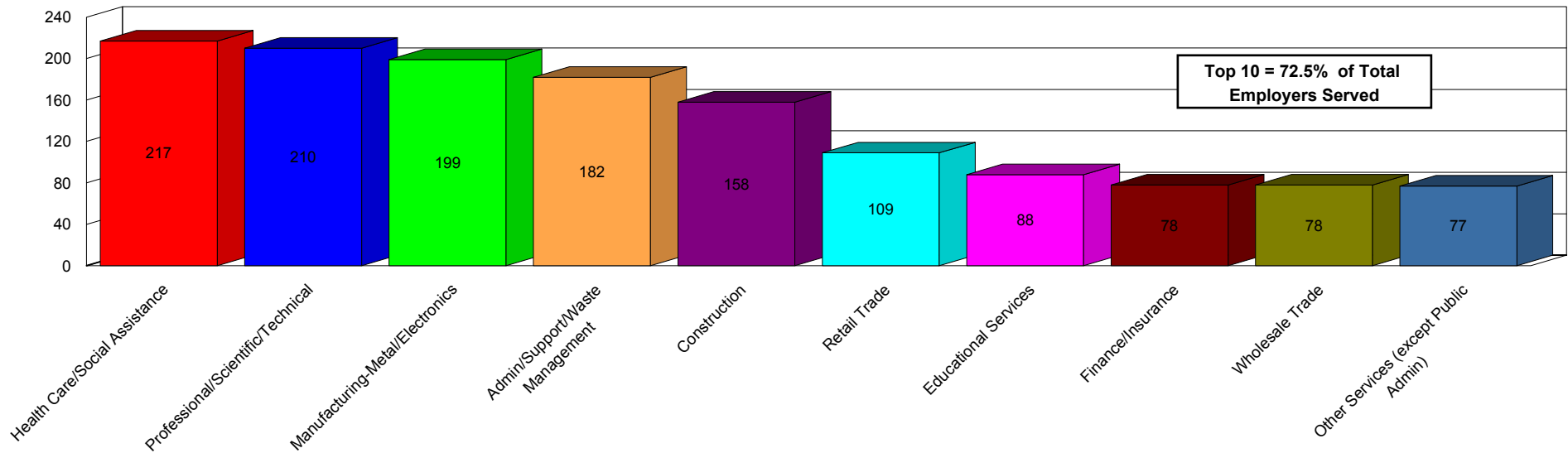
Job Orders and Associated Job Openings



Employer and Job Opening Characteristics

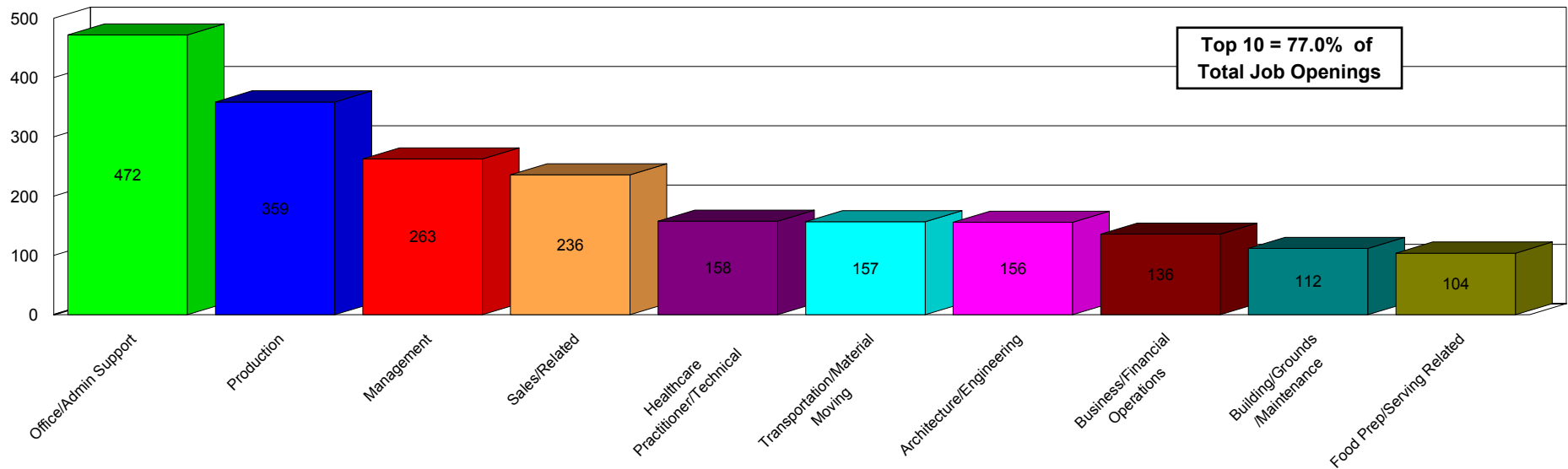
Employers: Top 10 Industry Sectors

July 01, 2009 to June 30, 2010



Job Openings: Top 10 Occupational Categories

July 01, 2009 to June 30, 2010





Performance Dashboard Merrimack Valley

For the Period:
July 01, 2008 to June 30, 2010
(Unless Otherwise Specified)

Notes on the Charts

In General: Charts based on the One Stop Career Center Activity Report (OSCCAR) make use of transaction (data entry) dates vs. service dates. Note that if the selected report end date is not 6/30 of a given year, the fiscal year count will reflect only activity through the month of the selected end date, assuming the selected end date is the last day of the month. If the selected end date is not the last day of the month, the charts will reflect counts through the last full month.

Total Customers Served: The distinct count of all customers with an approved (non-administrative) service during each fiscal year. Based on the OSCCAR Report.

Total Customer Visits: Customer visits reflect the number of distinct dates on which a customer visited a center or received an approved (non-administrative) center service per fiscal year. This is a measure of the intensity of center usage. Based on the OSCCAR Report.

Individual Services Provided: The distinct count of customers who receive services of each type during the most recent fiscal year in the report period is shown in the first bar for each service. The count of distinct service dates for those customers is shown in the second bar, e.g., if 50 customers participated in one or more workshops during the period, the left bar would show the number 50. The right bar would show the number of distinct service dates for this category for these customers. If each customer participated in two workshops on different days during the period, the right would show 100 service dates. Based on the OSCCAR Report.

Individual Customers - Monthly YTD Totals and Monthly YTD Visits - This Year vs. Last: These two charts show a comparison by month of customers served and of customer service dates for this year compared to last. Based on the OSCCAR Report.

New Training Enrollments: Top 10 Occupational Categories: This chart shows all new enrollments in occupational skills training courses by occupational categories specified for the training. Only the top 10 occupational categories are shown. The text box explains what percentage these enrollments represent of all occupational skills training enrollments. Note that only new enrollments for the period are shown, i.e., customers who were enrolled in a the previous fiscal year and are still in training are not reflected here. This report is based on all adult/youth customers during the report period who are enrolled in a course with an occupational skills activity, regardless of funding source. This report is drawn from the Massachusetts One-Stop Employment System (MOSES) statewide database.

Gender by Fiscal Year: This chart shows the number of male customers at the bottom of the stacked bar, and the female customers at the top of the stack, by fiscal year. Note that the counts are cumulative, so that the lower number shows the number of males, and the higher number shows the total of males and females. Based on the OSCCAR Report.

Education Levels by Fiscal Year: This chart shows the trends in highest education level attained by customers receiving services across fiscal years. Based on the OSCCAR Report.

Education: This chart shows the breakout of highest education level attained for the current fiscal year. Based on the OSCCAR Report.

Ethnicity by Fiscal Year: This chart shows the trends across fiscal year in customers served based on ethnicity. Based on the OSCCAR Report.

Ethnicity: This pie chart shows the share of all customers served represented by the top 5 ethnic groups for the current fiscal year. Based on the OSCCAR Report.

Age by Fiscal Year: This stacked bar chart shows the share of total customers represented by each age group across fiscal years. Based on the OSCCAR Report.

Job Placements: If run at the Statewide - All Locations or Regional level, this report will show the number of job placements (in green) included in federal reports which is obtained from wage record matching and supplemented by career center data. This data is drawn from Tab 10, Chart 2, of the 2nd Quarter Performance Reports for each year. The data in this chart reflects the year-end results for the previous fiscal year (July to June). In addition, the chart shows job placements (in red) as captured by career center staff, with another line (in blue) which shows how many are full-time jobs. For other report levels, only career center reported job placements appear--for all jobs and for full-time jobs. ***If running the report at other levels (Statewide Career Centers, Career Center or Local Office), the wage matching line will not appear. Please note that the number of job placements captured by career center staff is much lower than would be reflected in wage match reports, which may show two or three times as many placements as reflected in career center totals.*** For the career center reported data (red and blue lines), the line chart shows the distinct count of customers who received a service at the selected location at any time and who are recorded in MOSES during a particular fiscal year as entering employment. The red line shows all job placements, and the bottom (blue) line shows those that are full-time (30 hours or more). The career center data is based on the OSCCAR Report. Note that the job placements that are attributed to a selected location are based on the individual having received a service at the location at some time in the past, regardless of whether the placement was reported by the selected location or by another location.

Average Wage: The average wage of customers entering employment across fiscal years. Based on the OSCCAR Report.



Performance Dashboard Merrimack Valley

For the Period:
July 01, 2008 to June 30, 2010
(Unless Otherwise Specified)

Job Placements of Individual Customers: Monthly YTD Totals - This Year vs. Last Year: This chart shows the cumulative monthly count of job placements by month for the most recent fiscal year compared to the previous fiscal year. Based on the OSCCAR Report.

Job Placements: Top 10 Industry Sectors: This chart is based only those job placements with a start date during the most recent fiscal year included in the date range selected for the report and which have been *reported by the selected location*. *Note that the total job placements are less than the placements reported in the OSCCAR, since the OSCCAR only requires that the individual received a service at the location at some time in the past, whether reported by the current location or not.* Industry sectors are based on NAICS Division Codes, and only the top 10 industry codes are shown; however, the text box shows what percentage the placements in these industries represent of all job placements. In some cases, you might see "Unspecified"--this means that the industry sector has not been recorded in the MOSES database.

Job Placements: Top 10 Occupational Categories: This chart is based only those job placements with a start date during the most recent fiscal year included in the date range selected for the report and which have been *reported by the selected location*. *Note that the total job placements are less than the placements reported in the OSCCAR, since the OSCCAR only requires that the individual received a service at the location at some time in the past, whether reported by the current location or not.* Only the top 10 occupational categories are shown; however, the text box shows what percentage the placements in these occupations represent of all job placements. In some cases, you might see "Unspecified"--this means that the occupational category has not been recorded in the MOSES database. Note that since job placements may be legitimately assigned to multiple occupational categories, customers are counted distinctly only within occupational categories, i.e., the top10 may include some multiple counts of the same job placement. To make the ratio valid, the denominator ("all placements") was based on the sum of job placement counts at the occupational category level.

Employers Served: For Fiscal Years earlier than FY 2006, all employers are shown; in FY 2005, the definition of new vs. repeat customers was revamped and the new breakout did not occur until the following year. For FY 2006 and after, the stacked bar chart shows the number of repeat employer customers at the bottom of each stack and the number of new customers at the top by fiscal year. Note that the number at the top is cumulative, including both new and repeat customers. A new employer customer is considered one who received their first approved service in the selected location during the report period. Repeat customers are all employer customers minus new employer customers. Based on the OSCCAR.

Employer Service Contacts: This chart shows the number of distinct employer service contact dates by fiscal year. Based on the OSCCAR Report.

Employer Services: This chart shows the number of employers served and the number of employer service dates by type of service for the most recent fiscal year in the report period.. Based on the OSCCAR Report.

Employers Served and Employer Service Contacts: Monthly YTD Totals - This Year vs. Last Year: These two charts track month by month cumulative counts of employers served and total service dates. Based on the OSCCAR Report.

Job Orders and Associated Job Openings: This report shows the number of job orders posted during the period and the related job openings, i.e., a particular job order may include only one job opening or it may include 10 or even 100 job openings. Job orders reflect a specific employer contact, while job openings show the scope of openings posted that are related to that contact. This report is based current and archived job orders that have created dates during the selected report period for the selected location. Data is derived directly from the MOSES database. Because this chart accesses archived records, the number of job orders shown will exceed the number of Employer Visits for Employers Listing Job Orders in the OSCCAR Report.

Employers: Top 10 Industry Sectors: This chart shows the top 10 industry sectors represented by employers served during the most recent fiscal year for the selected location. The text box shows what percentage the top 10 represent of total employers served by this location during the time period. The industries are defined based on NAICS divisions. If you see "Unspecified," it means that the industry sector was not entered into the MOSES database for those employers. This chart is based on data taken directly from the MOSES database. Note that because it captures employers whose job orders may have been archived during the period, the total employer number will be larger than the OSCCAR Employers Served total, which only includes employers with approved services and/or non-archived job orders created during the period.

Job Openings: Top 10 Occupational Categories: This chart shows the top 10 occupational categories of job openings listed by employers during the most recent fiscal year for the selected location. Note that in some cases a job opening may be assigned to and counted in more than one occupational category because more than one logically apply. The text box shows what percentage the top 10 represent of total job openings (the sum of category totals, including some multiple assignments) listed with this location during the time period. If you see an "Unspecified" category, it means that the occupational category was not entered into the MOSES database for those job openings. This chart is based on data taken directly from the MOSES database.

MVWIB Press Release Regarding Expanded Eligibility for Youth Training Services

The Merrimack Valley Workforce Investment Board (MVWIB) expanded its eligibility criteria for regional youth employment and training services earlier this week.

Until now, the MVWIB trained young people who are both poor and have either academic, criminal or personal problems. The MVWIB Youth Council recommended and the MVWIB Planning Committee approved expanding its guidelines to include other youth at or near Federal poverty guidelines.

William Lantigua, City of Lawrence Mayor and MVWIB Chief Executive Officer, spoke at a board meeting in support of the change. He noted that "educational and personal problems surrounding many youth prevent them from pursuing job training. Let's not exclude anyone but instead add young people who want to turn their life around and can stick to it. We must ensure that our WIB's youth training money is fully and effectively spent."

Current youth job training must follow the Federal Workforce Investment Act of 1998. That Act stipulates that job training funds must be used to train the neediest youth but it allows regional WIBs to add additional eligibility criteria. This week the MVWIB included youth who live in U.S. Census designated poverty areas, non-traditional households or state subsidized housing.

Peter Matthews, Chairman of the MVWIB Planning Committee and President of the Merrimack Valley Credit Union notes that "Economically disadvantaged young people must be trained for jobs at the real companies that will hire them. We are here to help youth and adults meet those companies' standards."

Cal Williams, Youth Council Chair and United Way Development Director adds that "education and effort have been ways out of poverty for many of this country's poor people. We must help our youth remember that this is still the case."

Mayor Lantigua explains that "with high unemployment and public budgets harder to balance because resources are scarce, we cannot afford to spend and do things as we did in the past. We won't exclude anyone but we need to help today's motivated poor kids so that they can work and be future tax payers who can in turn help other poor kids out of poverty.

Rafael Abislaiman, MVWIB interim Executive Director and a former refugee states that we need to get back to basics and help more immigrants and other poor people enter this country's economic mainstream.

June 2, 2010

Anne Randazzo, DGA Administrator
Lawrence City Hall
200 Common Street
Lawrence, MA 01840

Dear Anne:

I write to you in your role as our Title 1 Administrator and in your professional capacity as a lawyer familiar with the Commonwealth's General Laws (G.L.C.). This letter attempts to outline issues related to the May 19, 2010 meeting of the Merrimack Valley Workforce Investment Board (MVWIB) Planning Committee. Draft meeting minutes of the May 19 meeting are attached. Most of that meeting and all of this letter deals with the Committee's discussion and vote on meeting agenda item *IV: Youth Council Recommendation on refunding two, LARE Out-of- School Youth (OSY) Training Programs for an additional year.*

G.L.C. Chapter 268A governs the conduct of public officials or employees. It states that "Unless you make a proper, public disclosure in writing -- including all the relevant facts -- you may *not* take any action that could create an appearance of impropriety, or could cause an impartial observer to believe your official actions are tainted with bias or favoritism."

As Mayor Lantigua's MVWIB Interim Executive Director, I am concerned that the Planning Committee's vote and my executive action to refund said contracts may cause "an impartial observer to believe" that the process was "tainted with bias or favoritism" toward LARE/American Training.

At the meeting, Arthur Chilingirian, ValleyWorks Career Center Executive Director, questioned whether Tom Connors, LARE CEO, should be allowed to speak. G.L.C. 39.23C states the following: "Any person who asks to address a public meeting must have the permission of the presiding officer. When the presiding officer requests silence, all persons shall be silent".

Mr. Connors asked for permission to speak and the Chairman granted him permission. In that light, I believe that no rules were impinged. His participation in the discussion may, however, raise the conflict of interest issue.

There are questions as to whether staff and/or committee members should or should not have spoken with Mr. Connors prior to the meeting. The MA Attorney General's 2008 Open Meeting Law Guide states that "the Law does not apply to any "chance" or "social" meetings of a governmental body or members of the body at which matters relating to official business are discussed, so long as no final decision on such business is reached. No decision can be seen to have been reached before the meeting so, in my opinion, no relevant rules were impinged.

Although the phrase was never mentioned, Mr. Chilingirian's attempts to prevent Mr. Connors from speaking at the meeting were not so much related to the open meeting law as to his concern that the proceedings not be tainted by a potential conflict of interest (COI). Mr. Connors is a MVWIB member with a financial interest in the items under discussion. The LARE contracts in question receive WIA funding. Section twenty of the Code of Federal Regulations (CFR) 667.200 pertains to U.S. Department of Labor General Fiscal and Administrative rules as they apply to WIA title I funds. CFR667.200 states the following:

*(i) A State Board member or a Local Board member or Youth Council member must neither cast a vote on, **nor participate in, any decision-making capacity** [my emphasis] on the provision of services by such member (or any organization which that member directly represents), nor on any matter which would provide any direct financial benefit to that member or a member of his immediate family.*

The above statement's "nor participate in" would appear to preclude the LARE CEO from participating in a discussion that would provide him "any direct financial benefit". But the above also raises a question on whether attending and speaking at a public meeting constitutes participating in "any decision-making capacity".

Why didn't the statute simply state 'nor participate in any decision making process related to the provision of services? Why does it instead include the phrase 'any decision-making capacity'? Does a vendor who is also an MVWIB member have "decision-making capacity" when the decision he attempts to influence continues to reside within a committee of which he is not a member? Or is a unique opportunity for a MVWIB member to argue and persuade committee members at a public meeting within the definition of "decision-making capacity"?

Our Procurement Policy, which was certified by the Commonwealth and which ultimately needs State recertification in order to be altered, is more proscriptive. It states "No employee, officer, agent or board member...shall participate in procurement activities resulting in the selection or award of contracts where a real or apparent conflict of interest may be involved." In the case of WIA or State funding, a policy developed by a local board or entity can be more restrictive than State or Federal policy but it cannot be less restrictive.

The local MVWIB Conflict of Interest Policy (COI), which is signed by all WIB members, defines COI as "whenever the interests or concerns of any officer, director or employee may be seen as competing with the best interest of the WIB." But then the question becomes whether renewing the underperforming contracts in question is in the MVWIB's "best interest". My arguments are in the minutes and I will not repeat them here.

Five of six Planning Committee members thought that the WIB's best interests coincided with the interests of LARE/American Training. Their reasons are as follows:

- The contracts' degree of underperformance is not a negative to the WIB. The employment performance rates cited in our contracts are goals and requirements. Given the region, State and country's current economic and unemployment problems, the vendor's job placement rate may reasonably be seen as adequate, or even as good.

- Inadequate performance was a result of the highly unusual, unanticipated character and life circumstances of a majority of clients served. It is in the best interest of the WIB to recognize that the vendor and career center are not to blame and that they are both victims of an unlucky set of clients.
- The vendor's performance has historically been excellent and denying the vendor second year renewal funding could impact its ability to provide similar services in the future. Denying it the stated funding may thus damage the MVWIB's future performance.

I believe that the last point has merit and should be weighed against the damage to be done by re-contracting for second year services when first year services did not meet the negotiated, employment placement rates that were clearly cited in the contracts in question. It should also be noted that the performance of every training vendor has a direct impact on the WIB and the region. Failure to meet performance results may result in corrective action and loss of State incentive funds. Re-funding unsuccessful programs without changing them may seriously undermine the region's performance

Federal law states that a Youth Council should provide youth program funding recommendations to a WIB. At least one Planning Committee member insinuated that MVWIB Youth Council information was being filtered and manipulated by staff. In consequence, the perception exists that the Federally-mandated decision making process was compromised. My subsequent investigation has shown that, although the relevant Youth Council minutes were posted on the MVWIB web site, Planning Committee members did not receive hard copy minutes of the April 4, 2010 Youth Council meeting. Planning Committee members may have been unaware of their contents when they voted to refund the LARE OSY programs. The Youth Council recommendation not to refund those contracts may not have had sufficient impact on the process.

It also appears that LARE never received an official written notice stating that their first year employment placement rates disqualified them from second year funding. The case can reasonably be made that neither the Youth Council nor the Planning Committee needed to be involved in the process outside of a formal grievance procedure.

Second year contract renewal is not a procurement nor is it new program planning. The continuation or termination of an existing contract is normally done by professional staff who are tasked with enforcing contractual details. The MVWIB may best be used as an appeal tribunal for decisions that a vendor considers unreasonable, arbitrary or capricious.

In this instance the process broke down because staff never sent LARE a second-year contract termination letter, something that was within their purview as contract administrators. LARE was in-turn unable to follow the normal grievance procedure.

It should also be noted that there was some confusion on whether the Planning Committee's discussion was to fund one, two or three programs. The May 19, 2010 draft minutes indicate that at least one of the five members who voted for two contract renewals looked to re-contract only the Educational Medical Assistance Program and considered the other contract "*a waste of money*". The Minutes of the April 21 Planning Committee Meeting also includes a motion to refund only the Educational Medical Assistance Program.

The Conflict of Interest Statement which all MVWIB members sign includes the following statement:

V. Additional Procedures Necessary to Approve Any Conflict of Interest Involving a Material Financial Interest.

The Board of Directors shall not approve any transaction to which (the) WIB would be a party in which an officer, director or employee of (the) WIB has a material financial interest unless and until the Board of Directors has specifically and in good faith determined after reasonable investigation that:

- 1. It is aware of all material facts concerning the transaction and the officer's, directors' or employees' interest in the transaction;*
- 2. The Corporation is entering the transaction for its own benefit;*
- 3. The transaction is fair and reasonable as to (the) WIB; and*
- 4. The Corporation could not have obtained a more advantageous arrangement with reasonable effort under the circumstances*

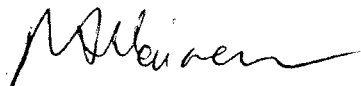
Given that one member who voted for the final motion considered part of what the motion proposed to refund a "waste of money", questions arise as to whether the motion passed by the Planning Committee was entirely fair or reasonable.

I do not know if the MVWIB approved or is familiar with The Division of Grants Administration Procurement Policy (Revised 02/2006). Its page four Section E is entitled "Approve the selection of contractors or service providers" and states "Following review and approval by the pertinent specific WIB committee, a recommendation is made to the WIB Executive Committee for final approval."

On the above basis, I hope to bring the issues contained in this letter to the MVWIB Executive Committee. I do not know the answers to many of the questions raised above and look to include your opinion, as both a lawyer and our Title 1 Administrator, in my presentation to the Executive Committee.

The Executive Committee is planning to meet at 9 AM on Thursday, June 17, 2010. I thank you in advance for your prompt and thoughtful reply to this letter.

Respectfully,



Rafael Abislaiman
Interim Executive Director

Cc MV WIB Executive Committee
Arthur Chilingirian, VWCC Executive Director
Tracy Myszkowski, DGA Finance Director

The Role of the Youth Council in the WIB's Fund Allocation Process

As seen in the following Workforce Investment Act of 1998 excerpts, Youth Councils have a Federally-mandated role - their recommendation is needed before a program is reviewed by any other WIB entity. Hence, their role is not simply an advisory one. It is an integral part of the decision making process and a critical step before youth funds are allocated to new activities.

[Please know that all of the above and the below **bolded** comments within [] italics are the MVWIB Director's. The rest is in the Workforce Investment Act of 1998, the law under which we currently operate.]

[WIA youth grant awards are contingent upon the recommendation of the Youth Council. We can reasonably assume that the Board can reject, increase or reduce Youth Council recommendations. The Board cannot however create a recommendation and then also approve it.]

(2) Selection of operators and providers.--

(A) Selection of one-stop operators.--Consistent with section 121(d), the local board, with the agreement of the chief elected official--

(i) shall designate or certify one-stop operators as described in section 121(d)(2)(A); and

(ii) may terminate for cause the eligibility of such operators.

(B) Selection of youth providers.--Consistent with section 123, the local board shall identify eligible providers of youth activities in the local area by awarding grants or contracts on a competitive basis, **based on the recommendations of the youth council....**

(h) Youth Council....

(4) Duties.--The duties of the youth council include--

(A) developing the portions of the local plan relating to eligible youth, as determined by the chairperson of the local board;

(B) **subject to the approval of the local board and consistent with section 123--**

(i) **recommending eligible providers of youth activities, to be awarded grants or contracts on a competitive basis by the local board to carry out the youth activities; and**

(ii) conducting oversight with respect to the eligible providers of youth activities, in the local area;

(C) coordinating youth activities authorized under section 129 in the local area; and

(D) other duties determined to be appropriate by the chairperson of the local board....

[Again, WIA youth contracts are awarded based on the recommendation of the youth council]

SEC. 123. IDENTIFICATION OF ELIGIBLE PROVIDERS OF YOUTH ACTIVITIES.

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....

[We are as yet unclear as to what appeal process there should be in regards to youth council recommendations. It may be appropriate for the planning committee to hear vendor appeals. But then a vendor would need to prove that the contested recommendation was "arbitrary and capricious" and that is very difficult to do.]

Merrimack Valley Workforce Investment Board Manufacturing Surveys

Numbers below are anticipated new employee requirements per category based on 9 employers responding.

	2010	2011	Total '10-'11	2012	2013	2014
Entry level Assembler Entry	5	10	15	10	10	10
Intermediate	2	9	11	11	4	4
Experienced	1	5	6	2	2	2
Deburrer/ Polisher Entry	1	4	5	1	3	1
Intermediate	1	4	5	5	4	2
Experienced	4	4	8	3	2	2
Prototrak/Manual Mill Entry						
Intermediate						
Experienced	1	3	4			
Manual Lathe Entry						
Intermediate	1	1	2	1	1	1
Experienced		2	2	1	1	
NC Mill Entry					1	
Intermediate	5	13	18	10	9	7
Experienced	9	13	22	10	11	11
NC Lathe Entry	4	4	8	4	4	4
Intermediate	3	7	10	5	2	3
Experienced	5	11	16	8	6	6
Screw Machine Entry						
Intermediate		1	1	1	1	
Experienced		1	1			
Cylindrical Grinder Entry	1	1	2	1	1	1
Intermediate		2	2	1		
Experienced		1	1	1		
Manufacturing Engineer Entry				1		1
Intermediate	1	2	3	1	1	1
Experienced	1	7	8	3	1	1
Quality Engineer Entry						
Intermediate	1	2	3	3	4	2
Experienced		4	4	3	1	1
Quality Inspector, Mechanical Entry						
Intermediate	3	3	6	7	5	1
Experienced	1	7	8	3	2	1
CMM Operator Entry						
Intermediate	2	4	6	4	2	2
Experienced	1	4	5	1	1	
NC Programmer Entry						
Intermediate	1	2	3	3	1	2
Experienced	1	5	6	3	1	2
CMM Programmer Entry						
Intermediate	1	4	5	2	1	1
Experienced		5	5			

2015

10
6
2
3
3
2
1
7
8
4
2
4
1
1
1
4
1
2
1
2
1
1

Merrimack Valley High Performing WIB Strategic Action Plan Development Grid

