

MONTANA'S WORKFORCE INVESTMENT ACT PROGRAM YEAR 2011 ANNUAL REPORT



July 1, 2011 through June 30, 2012



OFFICE OF THE GOVERNOR
STATE OF MONTANA

BRIAN SCHWEITZER
GOVERNOR



JOHN BOHLINGER
LT. GOVERNOR

A MESSAGE FROM THE GOVERNOR OF THE STATE OF MONTANA

I am honored to present the Work Force Investment Act (WIA) Program Year 2011 Annual Report.

Throughout the 2007-2008 recession and subsequent recovery, Montana's economy has outperformed the U.S. economy with lower unemployment and stronger gains in personal income. Montanans have tightened their belts, buckled down and put our state in a great position for generations to come. It is because of their diligence that we have more than \$453 million in the bank, and have maintain seven consecutive years of record budget surpluses.

The energy sector continues to provide new opportunities for our workers; though, other emerging industries such as information and advanced technology, health services, value-added agriculture, tourism and communications are strong and growing. A diverse economy requires a skilled and educated workforce. As workers continue to develop their skills, wages increase as well as the standard of living for all Montanans.

As the global economy recovers, more of Montana's products will be in demand overseas, leading to stronger income and employment growth. Our workforce is our number one resource, and investing in that workforce now will increase the likelihood workers will stay in Montana. We must also invest in our youth and provide them with the knowledge and skills necessary to enter and succeed in high skill, high wage careers.

As stakeholders in the future development of Montana's workforce system, it is up to us to ensure that our workers are ready for tomorrow's jobs today.

Sincerely

A handwritten signature in blue ink, appearing to read "B. Schweitzer".

Brian Schweitzer
Governor



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EXECUTIVE SUMMARY

Montana's vision for its workforce investment system is based upon two long-term goals:

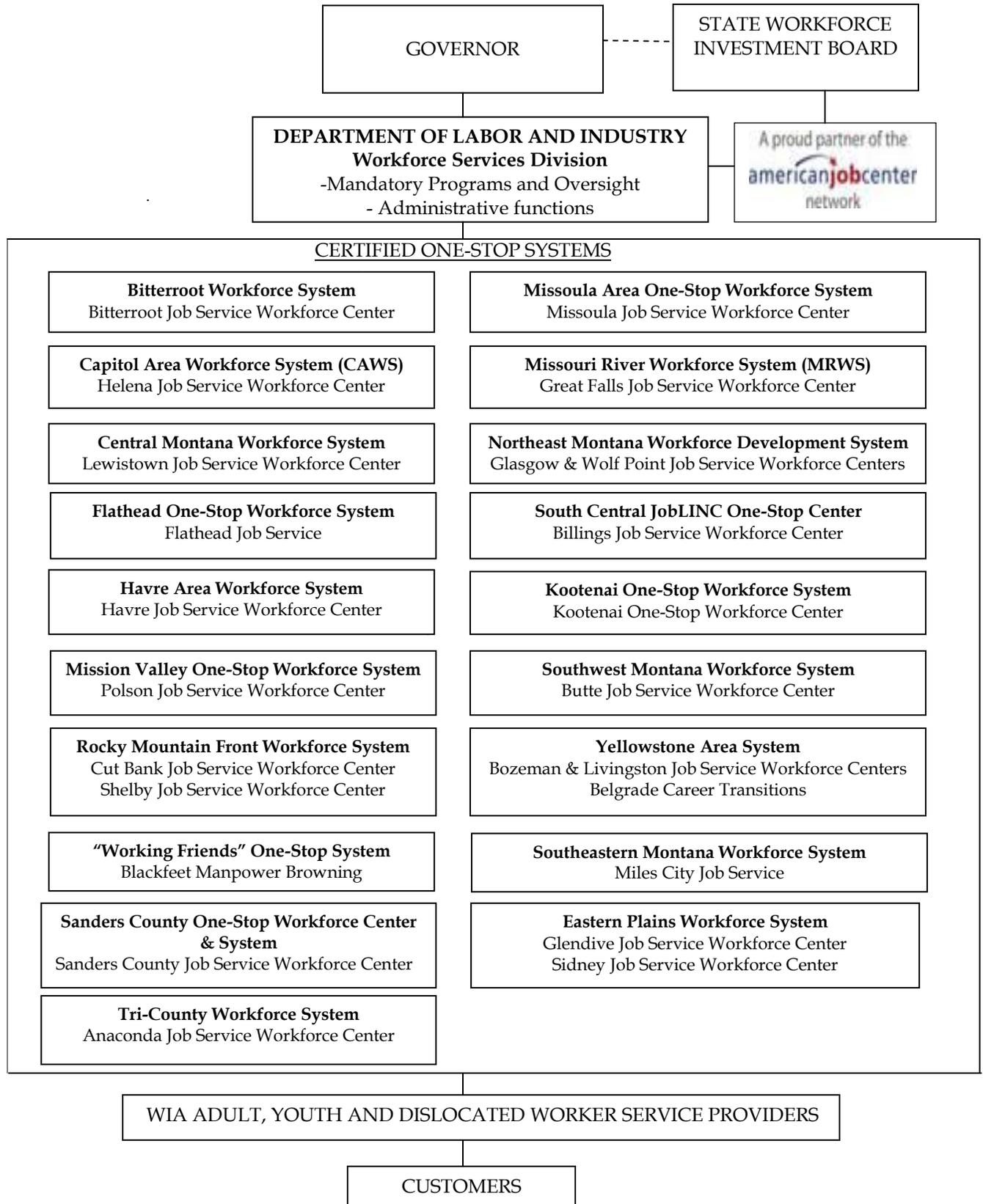
- ❖ promoting a diverse economy by providing skilled workers to emerging Montana industries, specifically those in information and advanced technology, health services, value-added agriculture, and communications; and
- ❖ promoting continual skill development, increasing wages, and an enhanced standard of living for all Montanans while preparing Montana's youth with the knowledge and behavior skills necessary to enter and succeed in high skill, high wage careers.

These two objectives are guided by the following five key principles:

- ❖ Our workforce system must be accountable to the people we serve;
- ❖ Our workforce system must be customer driven to meet individual needs and choices;
- ❖ Our workforce system must be accessible to all;
- ❖ Our workforce system must be efficient in providing services to guarantee maximum impact; and
- ❖ Our workforce system must be focused on promoting personal responsibility.

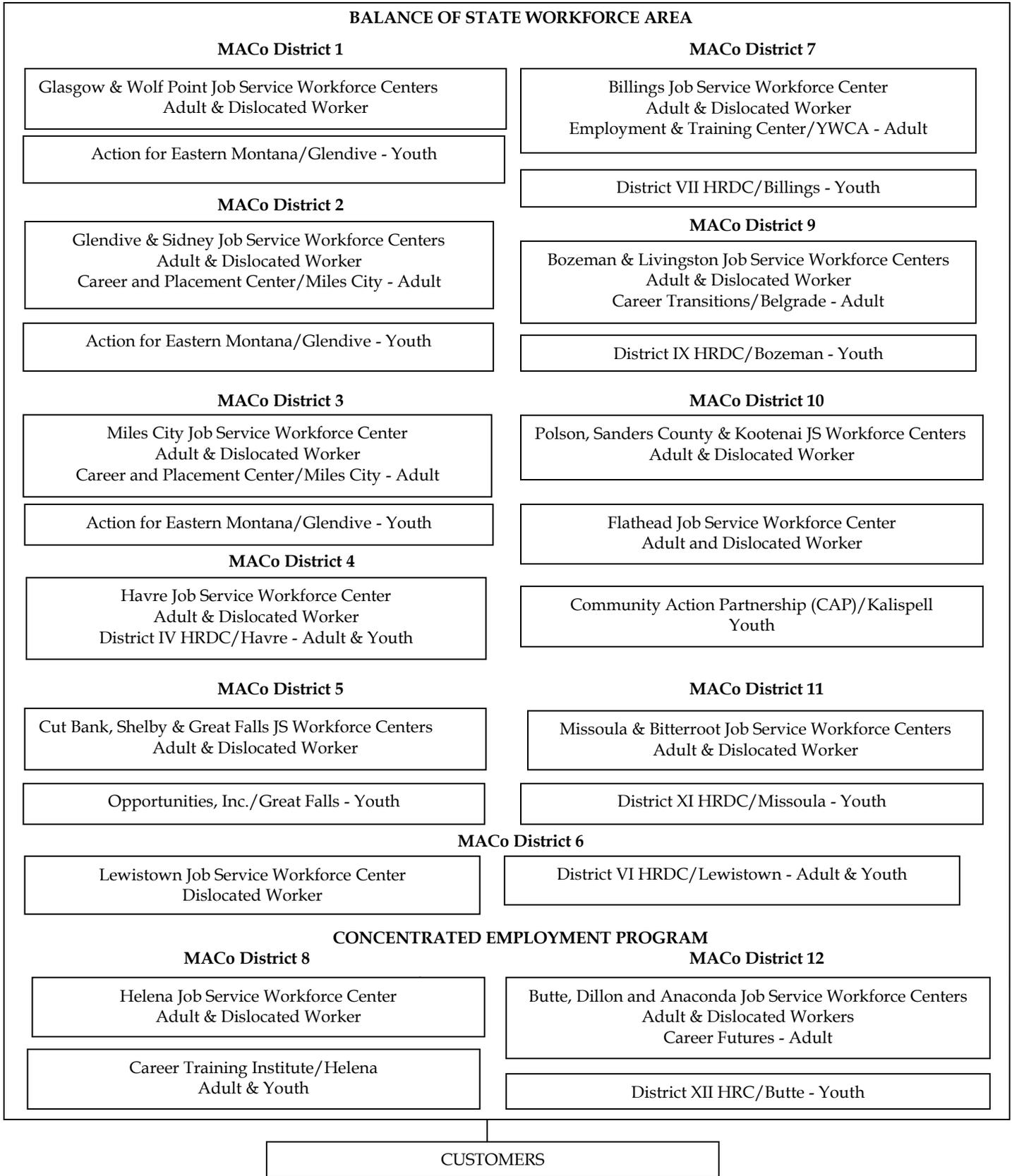
MONTANA'S WORKFORCE SYSTEM

ORGANIZATIONAL CHARTS



WIA SERVICE PROVIDERS

Adult, Dislocated Worker and Youth Programs by Workforce Area



SINGLE STATEWIDE PLANNING AREA

The State of Montana has been a single statewide planning area since 2006. There are two local areas, the Balance of State (BOS) and the Concentrated Employment Program (CEP), within the single statewide planning area. The Montana Department of Labor and Industry is the designated State Workforce Agency and the Statewide Workforce Programs and Oversight Bureau in the Workforce Services Division is responsible for the administrative oversight functions under WIA Title IB, which serves adults, dislocated workers and youth.

State Workforce Investment Board Certified One-Stops: The State Workforce Investment Board has 19 Certified One-Stop Systems and 24 Certified One-Stop Centers including the first Tribal One-Stop on the Blackfeet Reservation. One-Stop Centers provide services in all 56 counties and 7 Indian Reservations. Recertification occurs every two years. SWIB has recently amended the certification and recertification process based on the feedback from service providers. Guidelines and forms can be found on the SWIB website, www.swib.mt.gov. The recertification documentation requires One-Stop System Contact Information, Organizational and Facility Information, Marketing and Identifiers, Local Economy data, Partnerships, Service Delivery, Employer Services, Challenges, Innovation & Success information. MOU's are required between the SWIB and Operators as well as One-Stop and their partners to also include a roster of their One-Stop Community Management Team.

Community Management Teams were organized under the original WIA 5-Year State Plan in regions – areas within a hundred miles of a community that offers workforce development services. The CMTs include mandatory and many optional partners. Under the guidance and support of the Private Industry Councils and the State, those original CMTs began the process of preparing for One-stop certification under the Workforce Investment Act of 1998. The State Workforce Investment Board's commitment to promoting the role of the CMTs under the State Plan affords maximum flexibility for local development of the certified One-Stop System. MACo continues to play a role in collaborating with CMTs, Job Service Employer Councils (JSECs), the State Board, and regional and local economic development organizations, and participates in the development of the one-stop system at the most local level.

The State Workforce Investment Board's commitment to promoting the role of the CMTs under the State Plan affords maximum flexibility for local development of the certified One-Stop System. MACo continues to play a role in collaborating with CMTs, Job Service Employer Councils (JSECs), the State Board, and regional and local economic development organizations and participate in the development of the one-stop system at the most local level.

Co-location of One-Stop Centers is encouraged, however Virtual One-Stops and affiliate sites are allowable under this plan where local CMTs and the State Board determine it is in the best interest of the community, or when it is not financially or otherwise reasonable to co-locate. Montana has a large land mass so this approach allows access to services, not to a single "site". This will actualize the Governor's vision to coordinate and integrate services to effectively leverage local resources and meet needs at the local level.

Bitterroot Workforce One-Stop System: Serving Ravalli County, the Bitterroot Workforce System utilizes a campus approach to their One-Stop System. The designated One-Stop Center is at the Bitterroot Job Service Workforce Center in Hamilton. An affiliate site is located at the District XI HRDC. The communities of Corvallis, Darby, Hamilton, Stevensville, and Victor have satellite sites.

The Capitol Area Workforce System (CAWS) is a group of employment and training providers serving Lewis & Clark, Broadwater, Jefferson and Meagher counties who came together to form a new partnership in September of 1998. The designated One-Stop Center is the Helena Job Service Workforce Center.

The Central Montana Workforce System is made up of two formalized entities, the CMWS Community Management Team (CMT) and the Central Montana One-stop Center (CMOC). These two entities are made up of numerous agencies, organizations, and individuals located throughout MACo District VI as well as agencies and organizations from outside the district whose service area includes parts of MACo District VI. Over 200 different entities and programs offered throughout the district leverage their resources to serve Ferguson, Judith Basin, Petroleum, Wheatland, Golden Valley, and Musselshell Counties. The designated One-Stop Center is located at the Lewistown Job Service Workforce Center.

The Eastern Plains Workforce System serves a large portion of Eastern Montana, with 1-Stop Centers located in Dawson and Richland counties, and outreach sites in Dawson, Garfield, Prairie, Richland, McCone, and Wibaux counties, eastern Roosevelt County, and southeastern Sheridan County. Required partners are collocated at the Glendive Job Service and Sidney Job Service.

The Flathead Workforce System Community Management Team provides an integrated service delivery system for education, employment and training, business support, and economic development resources and services to the citizens of Flathead County. The designated One-Stop Workforce Center is located at the Flathead Job Service.

The Havre Area Workforce System has its designated center at the Havre Job Service Workforce Center. Their mission is to “Meet the employment related needs of North Central Montana by providing high quality, meaningful services in a seamless, effective and comprehensive employment and training partnership.” The Havre Area Workforce System has 19 partners serving Blaine, Choteau, Hill, and Liberty Counties, including the Rocky Boy’s Indian Reservation and the Fort Belknap Indian Reservation. Strong Tribal partnerships exist throughout the service delivery area. The Rocky Boy’s Indian Reservation is working to revitalize their economy by focusing on tourism. Aggressive projects to attract tourists have begun which not only provide employment during construction phases, but also provide jobs in the tourism industry for the local population.

The Kootenai One-Stop Workforce System serves the Lincoln County section of MACo District X. The Kootenai One-Stop Workforce System is a consortium of community partners established to collaboratively provide, and continuously improve, the seamless delivery of Workforce Development services in Lincoln County through efficient and effective coordination of workforce programs, information sharing, appropriate referrals and equal opportunity accessibility for all customers. The Kootenai One-Stop Workforce System is fully functional with the Job Service Workforce Center, serving as the designated One-Stop Center, complementing the Consortium.

The Mission Valley One-Stop Workforce System is a collaboration of service providers throughout the Greater Mission Valley, located in various physical locations. The designated One-Stop Center is in Polson at the Lake County Job Service Workforce Center. Close collaboration between agencies in this region has developed an effective network of communication and service delivery to a diverse base of customers, including businesses and job seekers.

Missoula Area One-Stop Workforce System: The Missoula/Mineral One-Stop Workforce Center is the Missoula Job Service Workforce Center. The Center has a commitment to serve all of Missoula and Mineral

counties. The Missoula One-Stop Workforce Center houses Experience Works, Job Corps, Job Service and Rural Employment Opportunities (REO). Center services and programs include: Wagner-Peyser, WIA Adult IB, WIA Dislocated Worker, Rapid Response, TAA, Veterans Employment and Disabled Veteran Programs, Re-employment services, Business and HR consulting services, links to Unemployment Insurance, WoRC, FSET and Older Worker services.

The Missouri River Workforce System (MRWS) delivers services to the counties of Cascade, Choteau, and Teton. The Center is located in the Great Falls Job Service Workforce Center. The MRWS has numerous community partners linking education, workforce development and business. The MRWS holds quarterly meetings, during which there is typically a morning learning session to cross-train staff from one-stop partner agencies. They also hold a business meeting to ensure cooperation, collaboration and efficient delivery of workforce services by all partners.

The Northeast Montana Workforce Development System is located in MACo District I. It serves Phillips, Valley, Daniels, Sheridan, and Roosevelt Counties. Northeast Montana Workforce System has two centers; one at the Glasgow Job Service Workforce Center, and one at the Wolf Point Job Service Workforce Center. A satellite site is in Poplar. The Wolf Point center and Poplar satellite site are on the Ft. Peck Indian Reservation.

The Rocky Mountain Front Workforce System has designated centers at the Job Service Workforce Centers in Cut Bank and Shelby. The Rocky Mountain Workforce System serves Toole, Pondera, and the balance of Glacier County not served by the "Working Friends" One-Stop system.

The Sanders County One-Stop Workforce Center & System encompasses Sanders County and includes areas lying within the boundaries of the Flathead Indian Reservation. This is a rural area with seven different communities lying along US Hwy 200, which runs east and west through the geographic area. It also includes MT Hwy 28 and towns located along that north-south route. A significant portion of the Flathead Indian Reservation lies within Sanders County. Sanders County is Montana's eighteenth most populous county, with an estimated 11,138 residents as of July 2006. Thompson Falls is the county seat is the state's 48th largest city, with a population estimated 1,313 in 2010.

The South Central JobLINC (SCJ): The South Central JobLINC One-Stop Center (SCJC) is located in the Billings Job Service Workforce Center. The SCJC services the counties of Big Horn, Carbon, Stillwater, Sweet Grass and Yellowstone. The SCJC has a Hotelling Center at the HRDC office in Hardin and provides outreach services at locations in Carbon, Stillwater and Sweet Grass Counties. Fourteen programs and agencies are located in the SCJC and nine programs and agencies hotel at the SCJC.

The Southeastern Montana Workforce System, for the purpose of the Consortium Agreement is the counties of Custer, Carter, Fallon, Prairie, Garfield, Powder River, Rosebud and Treasure. The Southeastern Montana Workforce System is the name of the partner agencies and organizations that provide an integrated service delivery system for education; employment and training; and economic development resources and services to the citizens of southeastern Montana. The mission of the Southeastern Montana Workforce System is "To meet the needs of our customers in the vast reaches of rural Southeastern Montana by providing efficient, coordinated, and continuously improving resources and services through a "no wrong door" concept."

The Southwest Montana Community Management Team in Butte serves the counties of Powell, Granite, Deer Lodge, Silver Bow, Madison and Beaverhead. The Center is located in the Butte Job Service Workforce Center. The Southwest Montana Community Management Team is active across a large region and has centers located in Dillon and Anaconda and computers for use in rural libraries and courthouses. They have clearly demonstrated responsibilities and cross training to other programs. Each site has resource manuals and works with employers, not just job seekers, supplying resources and assistance.

The Tri-County Workforce System is established to provide a variety of services to better serve our universal customers, job seekers and businesses. The services and system is marketed under the JobLINC system. The communities currently being served are: Anaconda, Warm Springs, Galen in Deer Lodge County, Deer Lodge and Garrison, Avon and Elliston in Powell County and Philipsburg, Hall, Maxville and Drummond in Granite County. Due to economic conditions (transportation costs/lack of public transportation, higher unemployment rates) in this area, certifying and designating this system as a stand-alone will give those seeking any services through a One Stop the opportunity to seek those services locally instead of traveling the 45-50 miles one way to access a certified one stop center in Butte. This separate system will allow better communication, better coordination and better concentration by those partners servicing only these communities in meeting and addressing those needs.

The Yellowstone Area System (YAS) has three centers: Bozeman Job Service Workforce Center, Livingston Job Service Workforce Center, and Belgrade Career Transitions, Inc. In Gallatin, Park, Meagher, Sweet Grass, and Madison Counties, the YAS diligently works to provide services to job seekers and employers. The YAS is a cooperative of employment and training agencies, social service agencies, and private sector business owners whose mission is “To empower individuals to thrive and excel; to manage change; to provide training and learning opportunities; to provide an educated and prepared workforce to area employers; and to help employers adapt to changes in technology, the economy, and the workforce.”

The “Working Friends” One-Stop System is the first and only Native American one-stop center in Montana and serves Native Americans on the Blackfeet Reservation.

Workforce Investment Act Adult, Youth and Dislocated Worker Service Delivery System: Montana has 37 service providers that deliver adult, dislocated worker and youth services in Montana’s two workforce areas. There are seven adult, youth and dislocated worker service providers in the Concentrated Employment Program (CEP) workforce area and 30 in the Balance of State (BOS) workforce area. Adult, youth and dislocated worker service providers are active members of the One-Stops in their area and some adult and dislocated worker providers are a One-Stop Center.

Adult and youth service providers were selected through the Request for Proposal process in June 2012. Contracts are written with the CEP and BOS service providers in each MACo (Montana Association of Counties) District. There are 12 MACo districts in Montana (refer to the chart on page 3 for the providers by workforce areas and MACo districts). In most MACo districts the Adult program funding is split between two providers, generally a private non-profit and a job service workforce center, through a single contract between the Statewide Workforce Programs and Oversight Bureau and the providers. New contracts are put in place on July 1st and run through June 30th of each program year. Dislocated Worker funding is contracted to the Job Service Operations Bureau by the Statewide Workforce Programs and Oversight Bureau and distributed to Job Service Workforce Centers across the state. Youth funding is contracted to providers in each MACo district. The existing service providers have traditionally been providing WI adult, youth and dislocated worker services since 2000 when Montana implement the WIA program.

LEADERSHIP

GOVERNOR’S STATE WORKFORCE INVESTMENT BOARD

The **mission** of the Governor’s State Workforce Investment Board (SWIB) is to engage, encourage and lead alignment across workforce development, education and economic development so that the maximum numbers of Montanans are gainfully employed. The SWIB advises the Governor on responding to industry’s needs for skilled workers, and workers’ needs for good jobs.

The SWIB's **vision** is to promote Montana's economic vitality and sustainability by ensuring that jobseekers have the education, skills and workforce preparation to meet employers' needs.

The SWIB's primary role in achieving its mission and vision is to:

- ❖ **Build An Aligned System Of Education And Training That Is Responsive To Montana's Industries:** Connect and facilitate alignment so that supply-side systems are efficiently and effectively meeting the demand of industry for skilled workers;
- ❖ **Focus On Workforce Challenges In Priority Industries:** Using a sector-based approach, convene system stakeholders and develop solutions for key industry workforce challenges that leverage both WIA and external resources; and
- ❖ **Oversee WIA Programs:** Direct and monitor Federal investments and system service delivery, developing policies and standards to increase efficiency and performance

The Montana workforce investment system is comprised of a large network of stakeholders. Each plays a vital role in ensuring that employers have access to a prepared workforce and that jobseekers have access to services and resources that will enable them to obtain and keep good jobs. The SWIB acts as a leader in this network through its ability to both make connections among these stakeholders and leverage Workforce Investment Act (WIA) resources to bolster the overall effectiveness of the system.

As a high-performing, business-led Board, the SWIB's charge is to lead broad strategic initiatives that leverage resources beyond WIA funding, while providing necessary system oversight. In 2009 the SWIB underwent an intensive planning process that resulted in identifying the following as key priority areas for action and committee development that have continued into PY 2012.

- ❖ **Sector Strategies:** (forest/timber, energy i.e. coal & bio mass/bio fuels, healthcare i.e. IT nursing, allied health & long term care, green), Industry Skills Panels
- ❖ **Youth Activities** - Statewide GED Initiative (FutureForGED) & Summer Employment Programs in partnership with Department of Health & Human Services, Temporary Assistance to Needy Families (TANF)
- ❖ **Life Long Learning Opportunities:** Innovative Employment & Training Models i.e. I-Best Pilot, Adult Career Pathways & Credentialing

The SWIB committees include the Executive Committee, Workforce Investment Act (WIA) Committee, Life-Long Learning Committee, Sector Strategies Committee, and The Youth Council. These committees conduct business as an advisory body to the Governor on statewide workforce system issues, as well as to assume responsibility for performing all Workforce Investment Act (WIA) local workforce board duties.

Executive Committee: The Executive Committee consists of private sector leaders from each of the three workgroups (described below), appointed representative(s) from the WIA Committee, the SWIB Chair, the SWIB Director, and others as deemed necessary. The Executive Committee leads the SWIB workgroups and has the authority to act on behalf of the SWIB. The Executive Committee's responsibilities are to:

- ❖ Oversee implementation of the strategic plan;
- ❖ Track workgroup plans and progress;
- ❖ Offer leadership around alignment of Workgroups;
- ❖ Offer leadership around leveraging system partners; and
- ❖ Drive the provision of critical workforce data

WIA Committee: The WIA committee is the Regulatory committee that provides oversight, ensures compliance with the applicable laws and regulations governing WIA Title IIB employment and training programs and develops meaningful accountability measures and outcomes.

Lifelong Learning Committee: The Lifelong Learning Committee’s focus is on training and education models that provide the current and future workforce with lifelong learning opportunities that are also responsive and aligned with new and changing economies. Such models emphasize “earn while you learn”; lifelong learning/advancement; meeting employers needs immediately (i.e. on-the-job-training, apprenticeship, workplace-based); and using skills upgrading as a strategy to re-build declining economies.

Sector Strategies Committee: Sector Strategies work to develop deeper understanding of the interrelationships between business competitiveness and the workforce needs of the target industry, crafting workforce tailored solutions to that industry and its region.

Youth Council: The Youth Council provides leadership by serving as a catalyst to connect out-of-school youth and at-risk youth with quality secondary and post-secondary educational opportunities and high-growth and other employment opportunities.

ACTIVITIES OCCURRING FROM 7/1/2011 – 6/30/2012

- ❖ **Montana’s Career Pathways Technical Assistance Initiative** – Montana was 1 of 10 states awarded. Initiative culminated in a statewide career pathways summit;
- ❖ **WIN/WorkKeys Pilots** - in ABE centers, Job Service centers, high-schools, and an alternative high school;
- ❖ **Incumbent Worker Program** – Grant program for small businesses to meet their training needs, preserve existing jobs, and/or enhance employers and workers skills. Piloted in 2007-2009 in 12 counties. Legislation of 2009 enacted it as a statewide program;
- ❖ **Apprenticeship** – on-going outreach, modernization and new opportunities i.e. Green Technology Curriculum, Pre –Apprenticeship Linemen Program , Women’s Prison Pre-Apprenticeship Culinary Program – Recipient of the 2012 Trailblazer and Innovators Award by US DOL Office of Apprenticeship;
- ❖ **Re-designed the One-Stop Center Certification and Re-Certification process.**
- ❖ **College! NOW** - 2 Year College System Changes – SWIB representation;
- ❖ **Expanding Business Engagement Initiative Grant** -SWIB representation;
- ❖ **WIA-Wagner-Peyser Integrated State Five Year Plan 2012-2016;**
- ❖ **Request for Proposal (RFP’s) for Adult and Youth WIA Statewide Service Providers** - contracts issued 7/1/2012;
- ❖ **Montana Healthcare Workforce Statewide Strategic Plan** in partnership with Montana Healthcare Workforce Advisory Committee & Montana Office of Rural Health/ Area Health Education Center, November 2011.

GOVERNOR’S DISCRETIONARY (5% SET-ASIDE): The following projects were funded using the 15% Set-Aside funds: No new projects are being considered at this time due to the current reduction in funds to 5%.

- ❖ **Jobs for Montana’s Graduates**
 - Middle School program: Regional Adventure Day
 - High School program: Student Scholarships
 - Student Conferences – Funding to attend the JAG National Student Leadership Conference in Washington D.C.; the Career Development Conference, Billings MT; and the Fall Leadership Conference, Helena MT
 - Career Specialists for JAG National Training Seminar
 - Winter Training Professional Development

- Supplemental Funding for Schools to allow JMG to offer select schools additional funding so they can retain the program at its current levels.
 - National Award Recipients for Seventh Year in a Row
- ❖ **Montana Associations of Counties (MACO)** receives annual support from Set-Aside funds to support the SWIB's MACO representative's attendance at the national association. Currently one MACO representative serves on the SWIB.
- ❖ **WIN/WorkKeys Assessment/Certification Pilots** to be used in eight job service workforce center sites across Montana to pilot for two year project period the WIN/WorkKeys testing and certification program. A positive outcome of workplace skills training is that a person who obtains the Career Readiness Certificate may receive extra consideration when applying for a position. Additional goals include transitional credits, preferential screening and pay differentials with select employers and workforce readiness credentials recognized at a local, state and national level-going.
- ❖ **Math and Science Initiative** to secure and continue a state initiative to promote math and science as a key to preparing a workforce capable of competing in a global economy.
- **Future Work**
 - Continue outreach and distribution of classroom materials that encourage hands-on exploration of math and science through gardening.
 - Funds classroom materials and small amount for distribution
 - Funds travel and materials for workshops to train teachers and volunteers in Gardening/agriculture curriculum
 - Continued promoting program of Roadside Geology Markers
 - Funds travel to geologic signs to meet students and scientists and wages for coordination of events
 - Continue partnerships with teachers, schools, education and nonprofit organizations that are promoting math and science education in Montana
 - Funds travel to events across state and wages for coordination of events
- ❖ **The Eureka Forest Restoration Training Program** is a partnership that is the result of numerous studies, including the Regional Comprehensive Economic Development Strategy and the recent Department of Labor's Regional Innovation Grant (RIG) process identifying the need to build relationships with forest management agencies as it relates to the need to train the forest/timber industry. Eureka Rural Development Agency (ERDA) is leveraging a number of local, state, and federal resources to fund the pilot project/program including local ERDA dollars, ARRA, CDBG-ED and Governor's WIA Set-Aside. ERDP is working with the Federal Forest Service on an ARRA project within the national forest, specifically wild land urban interfacing while providing training and carrying out field research for curriculum development. This is a pilot project in partnership with the local Forest Service, unique to the State and not tried before. The outcome is to have an accredited training program that can be replicated across Montana through the MSU-Extension program. This is a new innovative pilot project unique to this region and State. A partnership and training project of this nature has not been tried before. This project is designed to address those hard hit by the massive decline in the forest/timber industry resulting in high numbers of dislocated timber industry workers. The project recently won the Regional Forests Honor Award.
- ❖ **Angel Investment: An Opportunity for Montana Entrepreneurs Model Training Proposal "Starting and Growing High Impact Montana Businesses"** to assist entrepreneurs who have the intent and skill sets necessary to create jobs. The project will train entrepreneurs how to understand the private investor's point of view and to conceive how new businesses can more effectively raise equity

which will help ensure business success and enhance job creation; serve to connect the entrepreneur with angel fund mentors and advisors, a connection that has proved to be critical on the path to successful enterprise creation; help put the focus on building the entrepreneur training and development side of the equation for companies and individual who want to scale a business beyond self-employment or lifestyle. The Frontier Angel Fund is a group of accredited investors dedicated to providing equity capital to early and mid-stage entrepreneurial companies. In May of 2012, the project lead presented the newly developed curriculum, which is an introduction to start-up capital, examining investment opportunities, exit strategies and options, capital sources for entrepreneurs - angel investors vs. venture capital.

- ❖ ***National Center for Health Care Informatics (NCHCI)*** is working with Montana University System to develop a coordinated approach to creating 4-6 Computational Science courses and a Master's - level curriculum in Computational Science that will prepare a trained workforce to advance science and engineering principles through the application of Computational Science. NCHCI will also identify opportunities to integrate these efforts with existing Science, Technology, Engineering, and Mathematics (STEM) initiatives occurring at the secondary education level.
- ❖ ***Grant/Project Partnerships and Endorsements for Submissions*** for such as: Trade Adjustment Assistance Community College and Career Training Grants, Workforce Innovation Grant, Montana Veteran's Outreach, Montana's College!Now and Rigorous Programs of Study.

WAIVERS

To make the best use of resources, Montana continues to take advantage of federal waiver opportunities to seek relieve from provisions that restrict flexibility and creativity or limit efficiencies. Montana submitted waiver requests covering a broad array of workforce issues as part of the revised State Plan in 2012. The waivers are extended through June 30, 2013. The waivers were developed with the Governor's State Workforce Investment Board. The waivers are listed below:

- ***Waiver to implement the common measures performance standards only for WIA Title IB Adult, Youth and Dislocated Worker Programs:*** Montana is currently working under an approved waiver that allows Montana to implement the nine common measures for WIA Title IB adult, youth and dislocated workers and stop reporting on the 17 performance measures (15 core and 2 customer satisfaction). WIA Staff in the Workforce Services Division continue to develop policies and provide technical assistance to adult, youth and dislocated worker service providers to ensure their understanding of the programmatic and reporting impacts of the measures. The benefit of this waiver to Montana and its providers has been the ability to focus on employment placement and retention, earnings, placement in education, attainment of degree or certificate and literacy and numeracy gains thereby making meeting performance standards more attainable. The State has found that ability to focus on only the common measures ensures a greater probability of success.
- ***Waive the Subsequent Eligibility Determination of Eligible Training Providers:*** Montana is currently working under an approved waiver to postpone the implementation of the subsequent eligibility determination process for Eligible Training Providers. The benefit of this waiver to Montana is that it allows the State to keep previously approved providers and add new providers to the ETPL thus providing customers with training option choices. The result is skilled customers entering the labor marked with increased earnings and retention.
- ***Waiver to Allow A State Board to Carry Out the Roles of Local Boards for a Single State Wide Planning Area Structure:*** Montana received waiver approval from USDOL in 2006 to move to a single statewide planning area structure. The goals identified in the waiver were to: (1) reduce overhead costs and increasing program dollars; (2) expand the number of One-Stops in the State; (3)

redesign youth programs and target youth most at-risk; (4) strengthen the administrative oversight and accountability processes; and (5) increase training opportunities. The positive outcomes that have occurred as a result of the waiver include: maximizing the available money directed to training and services to business; promoting the role of Community Management Teams (CMTs) and including mandatory partners and many optional partners in the One-Stops and CMTs; establishing a Youth Council that is a sub-committee of the SWIB; and serving a greater percentage more participants with WIA dollars.

- **Waiver to Exempt a State From the Requirement to Provide Local Area Incentive Grants:** Montana received approval to exempt it from the requirement to provide local areas incentive grants to reward regional cooperation, local coordination of activities and exemplary performance. With the decline in WIA funds as a whole, the amount of money each provider would receive as an incentive would be insignificant, and the way the state is able to put the entire amount to more meaningful, proven use by providing technical assistance and training conferences and training on the use of the MontanaWorks computer system positively affects all WIA providers.
- **Waiver to Allow the use of Individual Training Accounts for WIA Eligible Youth:** Montana received approval in June 2011 to waive the regulatory prohibition of using Individual Training Accounts (ITAs) for Youth, with the exception of in-school and younger youth. The waiver is in effect until June 30, 2013. The benefit of this waiver is the flexibility in youth program delivery and providing the youth customer a choice regarding selection of schools on the ETPL. Youth learn responsibility by making informed decisions and the waiver allows participants to choose their post-secondary educational provider and allows youth service providers to set up ITAs for youth. Success with two of the youth common measure outcomes may be enhanced by this waiver; attainment of degree/certificate and entered employment/post-secondary education.

MONTANA'S LABOR SITUATION

Montana is in the Rocky Mountain area of the northwestern United States, bordered by the Canadian provinces of British Columbia, Alberta, and Saskatchewan on the north, Idaho on the west, Wyoming on the south, and North and South Dakota on the east. Montana is sparsely populated with 989,415 people spread over 147,138 square miles. It is the 4th largest state in land area and 44th in population.

Montana continues to experience positive growth in population as indicated by an increase of about 14,426 people from 2008 to 2009, or 1.5 percent. Of the nearly one million people living in Montana in 2010, 62.6% of the population fell within the normal working ages of 18 to 64 years old, which is similar to the national rate of 63%. Over the last year, Montana's economy has continued to expand, growing 3.1 percent from 2009 to 2010, with a decline in employment and a slight increase in annual average wages from 2009 to 2010. Some highlights of the past year include:

- Montana's personal income growth exceeded the U.S. in most quarters and did not lose as much personal income during the recession, losing only 4.4% of the prerecession peak compared to 5.6% nationally. Montana's personal income growth has outpaced the U.S. by about 3%. The average annual wage increased by 3.5% in 2011, driving Montana's average annual wage over \$35,000 for the first time.
- Montana's job growth shows that the state has regained 58% of the jobs lost during the recession compared to only 49% nationally. For payroll employment, which does not include self-employed and some agricultural workers. Montana regained about 61% of the jobs lost during the recession, while the U.S. has only recovered about 52% (through December 2011).
- Montana's unemployment rate, seasonally adjusted was 7 percent in 2011.

All areas of the state are now in recovery. The Southwest region added over 2,200 jobs in 2011 and based on job growth in the first half of 2012 is expected to continue this strong growth and add almost 4,000 jobs next year. The Eastern region, which had only one year of job losses in 2009 is also expected to post very strong job growth of over 2,000 in 2012, stimulated by increased income from the exploration of the Bakken oil shale. The South Central region gained about 1,000 jobs in 2011. Growth has slowed somewhat but the region continues to add jobs and may regain its pre-recession peak in 2012. The Northwest and North Central regions are not regaining employment quickly and may take several years to recover. The Northwest, in particular, suffered a large loss in one of its major base industries, wood product manufacturing, which brought significant income into the area. With home building expected to be at depressed levels for some time, demand for wood products and employment in the Northwest may take significant time to recover.

WORKFORCE DEVELOPMENT ACTIVITIES

- **Incumbent Worker Training Program:** serves the entire state with \$1,289,428 authorized per biennium through ESA funding. The Incumbent Worker Training Program is designed to increase the skills of Montana's Workforce which is a top priority of Governor Schweitzer and the Montana Department of Labor and Industry (DLI). An important segment of Montana's Workforce that has been overlooked for skill development is those workers who are currently employed by Montana businesses but who need to upgrade their skill level to remain competitive and productive in the work place. Equally important, Montana businesses - large and small - must have highly skilled workers in order to remain competitive in the global economy. Improving the efficiency and productivity of Montana's workers increases the ability of Montana's businesses to produce goods, serve customers, and remain competitive. With Montana's current economic situation, businesses understand that having the highest-skilled workers is increasingly important for meeting their customers' demands for products and services.

Full-time workers may receive up to \$2000 in grant funding, and part-time workers may receive up to \$1000 in grant funding. Eligible employers may train up to 20 workers per location, so grant limits vary depending on each employer's situation.

The business provides a 20% match for training attended within Montana, plus any amount beyond the allowable grant limit per worker. If training is attended outside of Montana, the employer provides a 20% match for the cost of training, a 50% match for travel and lodging, plus any amounts beyond the allowable grant limits. The final employer match varies depending on the training and training location. Partnerships are numerous, vary by community, and include the Montana Department of Labor and Industry's Job Service offices, workers, labor, businesses, the Business Expansion And Retention (BEAR) program, Small Business Development Centers (SBDC), and Montana Manufacturing Extension Centers (MMEC) throughout Montana. The BEAR program utilizes BEAR teams in communities. These BEAR teams are comprised of local experts in a variety of topics such as marketing, finances, post-secondary education, and the workforce system. Each BEAR team's makeup is unique to their individual community. Local partners work with employers to determine the needs of the employer and their eligibility for resources such as the Incumbent Worker Training program.

◇ **Benefits to Montana:** Workers, because they acquire transferable skills, skills, talents, and knowledge which make them more valuable in the workplace; are positioned for advancement within the business, potentially availing entry-level positions for other workers or job seekers (talent pipeline); and have potential increase in wages; connect with lifelong learning. Business benefits because IWT elevates skills of Incumbent Workers; increases productivity through efficient workers and processes; increases customer base; increases ability to compete in the national and global economy; provides more flexible workforce; increases retention of employees; strengthens and grows the business; and expands the workforce. Montana and its citizens benefit because IWT develops increasingly more skilled and efficient workforce; expands the economy with an increased tax base; potentially lowers the unemployment rate; cultivates lifelong learning; and provides cost-effective, timely training (bang for the buck).

◇ **Comparing Statistics:**

| | SFY2010 | SFY2011 | SFY2012 |
|----------------------------------|--------------|--------------|-----------|
| Funding Granted | \$173,353.92 | \$530,013.02 | \$554,486 |
| # Applications Approved | 54 | 295 | 419 |
| # Workers Trained | 150 | 735 | 793 |
| Average Cost per Employer | \$3,210.26 | \$1,796.65 | \$1,332.9 |
| Average Cost per Worker | \$1,155.69 | \$721.11 | \$699.23 |

◇ **Examples of Incumbent Worker Training** include: Asbestos Inspection / Remediation; Auto Body Repair Techniques; Automotive Claims Processing; Branding / Marketing; Communication Training; Computer Software including MS Word 2010, MS Excel 2010, MS Publisher 2010, MS PowerPoint 2010, accounting packages such as Quickbooks, Adobe products, and website management packages; Conflict Management; Grant Writing; Human Resource Training; Laser Engraving; LEAN Manufacturing; Phlebotomy Certification, and many others.

The Incumbent Worker Training Contact is Chris Wilhelm at ChrisWilhelm@mt.gov

Incumbent Worker Training Program Testimonials and Success Stories

Based on surveys of companies that participated in the program, 97% agreed that the trainings increased employees' production; 100% were satisfied with the IWT Program and would recommend it to other businesses; survey responses include:

- ◇ "Your grant allowed our Board President and Executive Director to attend a national leadership training we would not have had access to due to cost restraints,"
- ◇ "We support the renewal of these funds; it is an incredible help for small businesses,"
- ◇ "I am so thankful there is money allotted to small businesses for the advancement of their education,"
- ◇ "Great resource to make our training dollars go farther,"
- ◇ "Without this help my employees would not have had access to training,"
- ◇ "My customers already benefit from the training, as does my company,"
- ◇ "Our training helped standardize a team of people to handle the bookkeeping with the data entry being consistent. The books reflect an accurate source of financial information. Without this funding, we would be unable to afford the training to take us to the next level of success,"
- ◇ "If it was not for the training I would still be behind in the work needed for the company as we move forward with our growth and strategic planning,"
- ◇ "Your program helped us afford a proper training course,"
- ◇ "My staff was pleased with their training and have already utilized the information learned with success,"
- ◇ "The program allowed my staff to take some critical skills training for their job that is not available on a regular basis, and not covered by our organization's current budget. I am thoroughly impressed with this program and the people who are administering it. Thank you very much,"
- ◇ "This is so great for our small organization to have access to training funds,"
- ◇ "The training was intensive. Our designer came back with two ideas for immediate implementation and suggested we participate in a future training. We would certainly access this program again,"
- ◇ "The training we received was helpful in looking ahead toward improving and implementing new FDA sanitation requirements and procedures,"
- ◇ "Keep funding individualized training. It is such a good match of money to need,"
- ◇ "Receiving \$2,000 to help with our professional development is invaluable. We are so grateful for this program so we can be the most current and cutting-edge professionals possible,"
- ◇ "This program was an enormous help to us and I hope it continues as I could see future uses in other areas where training could be utilized to keep our company the most highly educated,"
- ◇ "Because I was able to attend this training, I was able to gain the full potential needed to run our software in the way it is intended to be run,"
- ◇ "We gained so much from this training. Our efficiency has increased 60%,"
- ◇ "One of the easiest programs to access with a minimum of paperwork,"
- ◇ "It is always helpful to a small business to be able to educate employees on updates to laws and regulations, and to keep them motivated. We will be able to update our employee handbook and procedures to keep our employees informed and updated,"

- ***Energy Training Partnership:*** The Montana Electrical Joint Apprenticeship and Training Committee (MEJATC) and nine other partner JATC's (Ironworker, Plumbers and Pipefitters, Sheet Metal, Carpenter, Laborers, Operating Engineers, Local 44, Lineman, and Bricklayers) received a \$5 million dollar federal grant award from the American Recovery and Reinvestment Act to invest in new energy job training in the state of Montana. The Montana's Department of Labor and Industry acts as the fiscal agent and Montana's State Workforce Investment Board, with 24 certified One-Stop Centers, will complement the grant.

The grant is to help the state's current apprentices and journeyman receive upgraded training for the green energy industries, specifically wind, solar, geothermal, and energy efficiency. This upgraded training will enable Montana's workforce to compete for and/or retain employment in the growing field of renewable energy and grow our standards to meet the needs of the future workforce.

Participants of the grant are receiving training or skills education will be electricians, electrical line workers, sheet metal workers, carpenters, millwrights, laborers, weatherization technicians, ironworkers (welders), HVAC technicians, power plant technicians, plumbers/pipefitters, bricklayers, and heavy equipment operators. MEJATC works collectively with a consortium of nine other JATC partners that represent their respective labor organizations and over 475 business/employers in Montana.

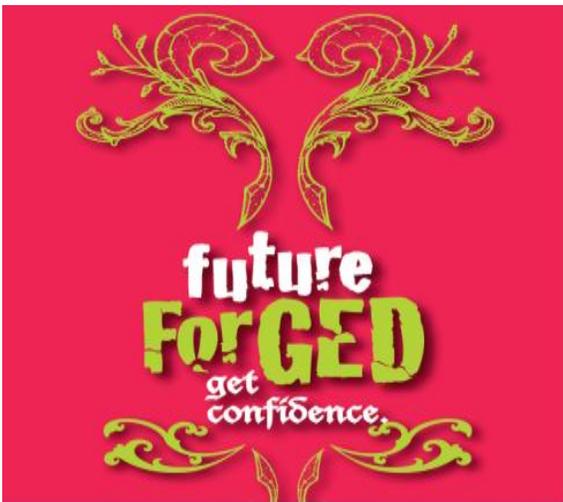
| | | | | |
|-------------------------|--|-----|-----|------|
| 1. | Total Exitters | 635 | 413 | 3489 |
| 2. | Total Participants Served | 415 | 2 | 3491 |
| 3. | New Participants Served | 289 | 0 | 3491 |
| Gender | 3a.i Male | 288 | 0 | 3291 |
| | 3a.ii Female | 1 | 0 | 198 |
| Ethnicity / Race | 3b. Hispanic/Latino | 6 | 0 | 78 |
| | 3c.i American Indian or Alaska Native | 14 | 0 | 132 |
| 3f. | Eligible Veterans | 50 | 0 | 472 |
| 1. | Number Completed Education/Job Training Activities | 293 | 0 | 3478 |
| 1a. | Number Received Credential | 293 | 0 | 3476 |
| (1) | Certificate | 293 | 0 | 3470 |
| (2) | Associate's Degree | 0 | 0 | 3 |
| (3) | Bachelor's Degree | 0 | 0 | 1 |
| (4) | Other Degree | 0 | 0 | 0 |
| (5) | Other Credential | 0 | 0 | 2 |
| 1b. | Total Credentials Received | 569 | 0 | 7599 |
| 1c. | Number Entered Employment | 6 | 0 | 330 |
| 1c.i | Number Entered Training-Related Employment | 6 | 0 | 330 |

STATEWIDE ACTIVITIES

• ***Governor's Interagency Rapid Response Team:*** The Rapid Response Team is a group formed by the Governor to provide immediate, coordinated response to dislocations and lay-offs around the State. The purpose of this team is to ensure that there is coordination and cooperation among the many state agencies that may provide a safety net of resources and information to assist workers and their families impacted by job loss. The team, composed of the Governor's Office of Economic Development, Office of Public Instruction, Office of the Commissioner of Higher Education, and Departments of Labor and Industry and Public Health and Human Services meet regularly to coordinate services and education and training resources for Montanans faced with unemployment and re-employment challenges. Currently, representatives from this group are engaged in the coordination/prioritization of resources that will be made available through the Trade Assistance Act to two year campuses in Montana for workers adversely affected by changes in world trade policy. One significant accomplishment for the Team was the development and rollout of "Surviving a Layoff", a web-based resource geared toward dislocated workers. This new resource can be found at: <http://survivingalayoff.mt.gov/>

• ***GED Initiative:***

In PY'10 the GED Initiative *future ForGED* was launched. The Shared Youth Vision Core Team and the Governor's Youth Council's mission to transition Montana's youth, ages 16-24 that have dropped out of school, and have not attained a diploma into labor force and/or on to post-secondary education became the mission of the Governor's State Workforce Investment Board. The State Workforce Investment Board's Youth Council and the Core Team completed phases one and two of launching the GED initiative. Phase one of the launch included two stakeholder meetings; the second phase of the launch was the distribution of promotional materials to a number of stakeholders including public libraries, one-stop centers, Adult Basic Education Centers, WIA service provider agencies, youth correction agencies, and other high-traffic locales across the state areas. A third phase includes holding a youth roundtable to solicit insight from youth as to the best way to continue the *future ForGED* campaign and looking at offering a reward or incentive for youth for achieving their GED.



Here is what one GED recipient had to say: *My motivation to obtain my GED was my kids, I didn't want my kids to be smarter than me. I also wanted to set a good example for them and be someone they can look up to. My GED helped me because it gave me the confidence to keep going further and in May I graduated from MSUB with my associates degree in process plant technology. It made me realize what I was really capable of and helped push me farther.*

• *Jobs for Montana's Graduates (JMG)*



For many at risk youth there are a lot of obstacles to finishing high school, but programs like the Department of Labor and Industry's Jobs for Montana's Graduates (JMT) Program are clearing the path. That's why for the seventh year in a row, the JMG program was nationally recognized with the "5 for 5" award. "Montana is setting the standard for other states across the country", said Labor Commissioner Keith Kelly. "Our graduation rate is 97% and I am proud to say the continued success of this

program is a reflection of the hard work and dedication of the both the students and the career specialists."

JMG is a program for high school and middle school students to assure that they graduate from high school and have selected a career path. Students are selected for the program due to barriers they may have to completing high school and entering the workforce. In school year 2010-2011, JMG supported a network of 49 programs offering 1079 students the potential for future career development by focusing on staying in school and finding a career path suited to their interests and abilities. JMG also has a middle school program which focuses on getting students to successfully transition into high school with a start on the development of their career plans.

Jobs for America's Graduates (JAG), has established five performance outcomes for students enrolled in JMG. The standards include graduation rate, positive outcomes of transitioning to work, post-secondary education, military, and full-time job placements.

Jobs for Montana's Graduates Receives National Award from Jobs from America's Graduates for Positive Outcomes: At the National Training Seminar, Jobs for America's Graduates awards state affiliates for excellence by analyzing the data in the eNDMS database system. For the most recent complete data year 2010-11, JMG was given the following awards:

| | | |
|--|---|--|
| STATEWIDE 5 for 5 JAG Performance Goals | | |
| PEAK PERFORMANCE AWARD MULTI-YEAR PROGRAMS STATE ORGANIZATION Graduation Rate Positive Outcomes Rate Employment Rate Lowest Unable to Contact Rate Total Participants Return-to-School Rate | PEAK PERFORMANCE AWARD SENIOR-YEAR PROGRAMS STATE ORGANIZATION Graduation Rate Positive Outcomes Rate Lowest Unable to Contact Rate | PEAK PERFORMANCE AWARD MIDDLE SCHOOL PROGRAMS STATE ORGANIZATION Return to School Rate |
| Outstanding Specialists Four of Montana's JMG specialists received this award | | |
| INDIVIDUAL SCHOOLS 5 for 5 performance goals Twenty of Montana's 49 schools were recognized | | |

• **YouthBuild Helena**

Nationally, the purpose of YouthBuild is to assist at risk youth in obtaining a high school diploma or GED and obtaining occupational skills in construction. As part of the training, students build or rehabilitate affordable housing for low-income families.

YouthBuild Helena is administered by Career Training Institute in Helena, Montana. The three-year project is funded by the US Department of Labor with the Helena School District, Helena College-



University of Montana, Montana Department of Labor Apprenticeship and Training program and Mountain West Bank as key partners. In addition, many local businesses and organizations have contributed in-kind or cash to CTI for YouthBuild activities.

In its first year, YouthBuild Helena served 29 youth between 16 and 24. Of those, nearly 80 percent were high school dropouts with the remaining students coming from the local alternative school. Students participated in educational, construction and volunteer service

activities throughout the year. Because so many of the students are high school drop outs, the main emphasis of YouthBuild is to re-engage those students in education that leads to a GED or high school diploma.

The first year was a success. Between October, 2011, and May, 2012, a two-bedroom home was built by YouthBuild students from the ground up. Students learned every aspect of construction, starting with safety and tool use, but also experienced in depth, hands-on instruction on foundations, framing, drywall, roofing, window/door installation, painting, flooring, trim and much, much more. YouthBuild students received OSHA 10, First Aid and CPR training as well. Many students earned earned a Home Builder's Institute Pre-Apprenticeship and Montana Department of Labor and Industry Pre-Apprenticesip certificates. Just as important as construction skills, YouthBuild instructors taught the importance of teamwork, conflict management, problem solving, work ethic, having a positive attitude, time management and good communication.



A public-private partnership has been key to the program's success. Mountain West Bank in Helena made a lot available in the Glacier Point subdivision for the YouthBuild program. Power Townsend provided discounted tools and materials, as well as a generous cash donation. The Lewis and Clark Extension Service staff donated their time to teach students how to lay sod and landscape the yard.

By May, 2012, the house, complete with a single car garage, landscaped yard and underground sprinklers, was ready for an owner. Laurie Koutnik, a local realtor with Landmark Company,



offered her services, at no cost to the program. Finding a qualified buyer was a unique challenge. YouthBuild regulations require that the house be sold to a low-income family as defined by Housing and Urban Development. The house was sold, after only two months on the market.

It's important to mention that students were also engaged in volunteer service throughout the year. The worksites included Habitat for Humanity ReStore, historic Kleffner Ranch, Helena Housing Authority, Lewis and Clark Historic Preservation, Rocky Mountain Development Council, Salvation Army, Toys for Tots and others. The volunteer labor of

YouthBuild students at Kleffner ranch was traded for the opportunity to have the YouthBuild graduation party in the historic barn.

Overall, 72 percent of the students successfully completed the core YouthBuild program. Of these four attained a GED, five received a high school diploma, nine earned HBI PACT certificates and ten earned Montana Department of Labor and Industry pre-apprenticeship certificates. A few students continue to work toward their GED or diploma in 2012. Fifty-three percent improved literacy or numeracy.

YouthBuild students continue working with CTI for up to 12 months after their participation ends. Staff assists students with career and post-secondary counseling, job search, job retention and mentoring. While a few students continue to work toward their GED or high school diploma, other students are working or entering post-secondary education.

OVERSIGHT RESPONSIBILITIES MONITORING

The Statewide Workforce Programs and Oversight Bureau as the oversight entity for WIA title IB programs has the responsibility for monitoring each WIA adult, youth and dislocated worker service provider. Monitoring includes a comprehensive review of program requirements, fiscal controls, management information systems, provider agreements and the eligible training provider application process. No major issues were found during regular PY'10 WIA monitoring and the monitoring process revealed that the service providers are doing a good job serving the participants of Montana.

TECHNICAL ASSISTANCE AND TRAINING

WIA Technical Assistance: The Statewide Workforce Programs and Oversight Bureau of the Montana Department of Labor and Industry hosted one Technical Assistance and Training (TAT) sessions in Program Year 2011. The session was held for adult, youth, and dislocated worker service providers in Helena, October 12, 13, and 14, 2011. In addition to giving the service providers assistance on operating their WIA programs, Dr. Richard Pimentel, a nationally renowned expert on Disability Management, Job Recruitment, Job Retention, Americans with Disabilities Act, and Attitude Change, gave vital information to case managers on how to engage the workforce system to employ people with disabilities.

Case Manager Basic Training: The Statewide Workforce Programs and Oversight Bureau implemented case manager basic training that is held twice per year for new case managers. The new case managers come to Helena and spend a day and a half learning the basics of case management as well as the MIS system, MontanaWorks.

Quarterly GoTo Meetings: The Statewide Workforce Programs and Oversight Bureau also implemented quarterly goto meetings with all service providers. These on-line meetings give the Bureau a chance to provide Technical Assistance in a very cost effective, quick manner. The topics that are chosen each quarter come from problems identified on the quarterly reports the service providers must submit to the Bureau and from any new requirements/initiatives that happen to come along.

TAA Round Table: In June 2012, the TAA case managers came together in Helena for the 2012 Trade Roundtable. This provided a timely introduction to the 2011 Trade Adjustment Assistance Extension Act and the resulting changes in policies, processes and TAA related forms.

PROGRAM MANAGEMENT

WIA Adult, Youth and Dislocated Worker Programs: The Statewide Workforce Programs and Oversight Bureau has statewide oversight and administrative entity responsibilities for WIA adult, youth and dislocated worker programs in Montana. Responsibilities include fiscal controls, grant management, participant data collection and tracking, reporting to the U.S. Department of Labor, monitoring, service provider training, technical assistance, policy interpretation and development. WIA services are provided locally through contracts between the Bureau and service providers.

Rapid Response: The Dislocated Worker Unit in the Montana Department of Labor and Industry is the oversight entity for the Rapid Response program. Assistance and early intervention services for businesses and workers facing layoffs or closures are provided by Montana's Job Service Workforce

Centers through individual appointments or in Rapid Response workshops. At the workshops, the affected workers receive information about various programs that will assist them in their transition to new employment. Rapid Response activities have included: commitments from state agencies for ongoing participation in the design and implementation of the States Rapid Response program to ensure timeliness, quality, and consistency in state services; compilation and dissemination to all state agencies of a comprehensive list of exiting services available to assist dislocated workers and their families, and the creation and maintenance of a master database listing all state jobs available to dislocated workers. The Governor's Interagency Rapid Response Team has continued to provide guidance and resources to local providers of Rapid Response services since its formation in PY08.

Montana's Trade Program: Trade Adjustment Assistance (TAA) is a federally funded entitlement program which offers assistance to workers who lose their jobs or whose hours of work and wages are reduced as the result of increased imports or production being moved to a foreign country. Workers must be included under a petition submitted to and certified by the US Department of Labor in order to access program benefits. TAA offers a variety of benefits and reemployment services to help the unemployed workers prepare for and obtain long-term, suitable employment.

The TAA program was originally established in 1974 with significant amendments made to the program in 2002, 2009 and 2011. Through the TAA program workers may be eligible for training, job search allowances, relocation allowances, and other reemployment services. Weekly Trade Readjustment Allowances (TRA) may be payable to eligible workers following the exhaustion of Unemployment Insurance (UI) benefits. Another benefit that may be available to older TAA eligible workers is a wage subsidy when the worker obtains new employment that pays less than their previous wage.

TAA eligible workers are also eligible for enrollment in the WIA Dislocated Worker program. In addition, some may also be eligible for enrollment in a National Emergency Grant (NEG). The standard practice in Montana is that TAA eligible workers be co-enrolled in the other dislocated worker programs for which they qualify, although there may be some exceptions.

In Montana, TAA activity has been predominately in the Western part of the state due to the downturn in the timber and wood product industries and the ripple effect on the region's economy in general. The TAA program is operated at the local level by the Job Service offices. In PY'11, Montana had 27 active TAA petitions covering 1066 impacted workers, and provided TAA services and benefits to 786 workers. Major companies with active TAA petitions in PY11 include: Smurfit Stone Container, Montana Tunnels, Plum Creek Lumber (several sites of operation), Montana Rail Link and Industrial Technologies. Major Industries affected included: Timber, mining, wood products/manufacturing, and transportation (rail).

Industries and occupations in which TAA participants received training and obtained employment included: Energy technology - including solar energy and refinery operations; banking; CDL/Truck Driving (mostly in North Dakota & Eastern MT); Medical related including: Licensed Practical Nursing, Para-medicine, CNA, medical coding, surgical tech and dental assistant; Welding, Welding Inspection Technology, Heavy Equipment Operator, Executive Legal Assistant, Paralegal; Information Technology, HVAC, Auto/Diesel repair; Metals technology (CNC Machining); Aviation Maintenance

Technology, Highway Technology, education/teaching certification; Cabinetry; Culinary, Geologist, Web Design, law enforcement and State employment.

National Emergency Grant (NEG): National Emergency Grant (NEG) funds are the Secretary of Labor's discretionary Dislocated Worker funds that are set aside to serve specific populations of dislocated workers. When a State suffers a major dislocation, they can apply for assistance for a specific population and receive a grant to serve those dislocated workers. NEGs provide the same types of services as the regular Dislocated Worker program. Grants are awarded for a two year period; however, that period can be extended in some situations.

In Program Year 2011, Montana operated two continuing NEGs. The continuing grants were the Western Montana Timber & Wood Products Economic Impact NEG and the OJT (On-the-Job Training) NEG. A total of **560** participants have been served through these two grants as of June 30, 2012.

Western Montana Timber & Wood Products Economic Impact NEG: This \$1.8 million grant has served hundreds of impacted workers from timber and wood products companies in the 7 western counties of the state. Worker dislocations that were a result of the Smurfit and Plum Creek closures and downsizing are eligible for services under this grant; as well as numerous smaller operations – such as, logging and log hauling companies - within the timber and wood product industries. Since the inception of the Timber grant up to June 30, 2012 ~ **477** workers impacted by layoff events from **39** different companies have been enrolled for services.

OJT/NEG: The OJT National Emergency Grant was awarded with an effective date of June 30, 2010 and was projected to end June 30, 2012. The State was awarded an additional \$1,265,009 in supplemental NEG funding June 30, 2012. The project will end June 30, 2014. This grant was awarded to serve laid off workers in Job Service Regions 1, 2 and 4 which encompass most of Western MT. These three regions experienced 38 timber and mining related dislocations of varying sizes and durations affecting 1,723 workers. The intent of this grant is to address the re-employment and re-training needs of the workers affected by these dislocations taking a multi-industry, multi-community/region approach. The original OJT grant award amount was \$889,009. Montana exceeded the enrollment goal for the first allocation of funds and expects to serve a total of 145 participants.

On-the-Job Training has already been a successful strategy to get people back to work and the original grant gave Montana the opportunity to re-employ 50 more workers.

Here are a just a few examples of participants that achieved success through the OJT/NEG: *Five electrical apprentices graduated from the Montana Electrical Joint Apprenticeship and Training. OJT NEG has given them the opportunity to accrue required hours towards journeyman status. All have continued employment with their OJT employer.*

Another participant graduated from FVCC and was unable to find employment in his field of study. Because of OJT NEG he was able to take advantage of alternate training which enabled him to obtain full time employment with benefits

Disability Program Navigator Grant: *Improving Outcomes for Individuals with Disabilities*
Montana's Disability Program Navigator Grant - Providing Enhanced Service Delivery for
Individuals with Disabilities: The Montana Department of Labor & Industry received a grant in PY'07 to operate the Disability Navigator Program. The main purpose of this grant was to fund Disability Navigators within the One-Stop system to assist individuals with disabilities to better understand and access the services and resources available through their local one-stops. The grant ended in June 30, 2011, with the sustainable outcome from the Navigator grant being Disability Resource Coordinators (DRCs) located in local Job Services continue to provide the same level of services and information for individuals with disabilities.

Montana's State Displaced Homemaker Program: The State Displaced Homemaker program, originally established by the Montana State Legislature in 1983 and amended in 1995, provides services to Montana residents 18 years of age or older who have been in the home primarily caring for the home and family without compensation and for that reason have diminished marketable skills; and have been dependent on public assistance or on the income of a relative but are no longer supported by that income; or whose youngest child will soon become ineligible for TANF; or are unemployed or underemployed and are experiencing difficulty in obtaining suitable employment; or is a criminal offender.

The program is administered by the Workforce Services Division in the Montana Department of Labor and Industry and receives \$212,707 annually. Most of the funding, \$193,370 is directly granted to six private, non-profit organizations in local communities to serve individuals. In PY'11 over 130 participants received services through the State Displaced Homemaker program with 66% of the participants exiting the program to employment at an average wage of \$10 per hour. State Displaced Homemaker performance measures are entered employment and wage at placement. Program operators have consistently met and exceeded expected performance.

FINANCIAL ANALYSIS



Montana completed its twelfth year of the Workforce Investment Act with an overall spending rate at 90%. Adult, youth, and dislocated worker services providers are in place, as well as the rapid response delivery system. Participant data collection and analysis has been completely automated. Montana is a single planning state with no mid-administrative level; therefore local admin. expenditures are quite low.

The WIA program has made a significant difference in providing participants with the training and skills needed to enter the workforce at a self-sufficient wage.

WORKFORCE INVESTMENT ACT FINANCIAL STATEMENT
PROGRAM YEAR 2011
 July 1, 2011 through June 30, 2012

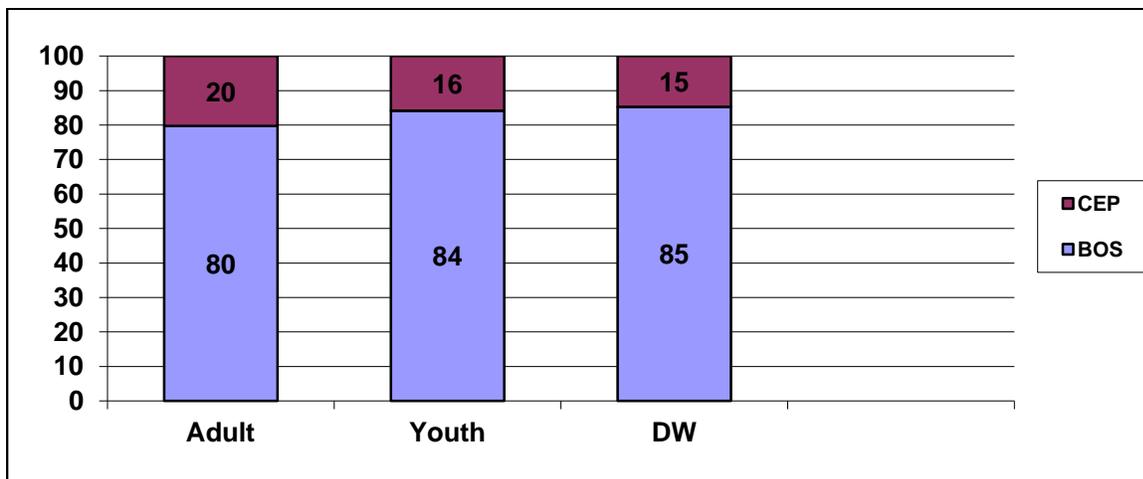
| PROGRAM | AVAILABLE | EXPENDED | BALANCE REMAINING | PERCENTAGE EXPENDED |
|----------------------|----------------|----------------|----------------------|------------------------|
| Statewide Activities | \$ 316,804.10 | \$ - | \$ 316,804.10 | 0% |
| <i>Carry-in</i> | \$1,058,157.52 | \$ 970,504.45 | \$ 87,653.07 | 91% |
| | | | | |
| Rapid Response | \$ 511,043.00 | \$ 505,446.00 | \$ 5,597.00 | 98% |
| <i>Carry-in</i> | \$ 105,975.55 | \$ 102,965.84 | \$ 3,009.71 | 97% |
| | | | | |
| Local Admin | \$ 193,678.90 | \$ - | \$ 193,678.90 | 0% |
| <i>Carry-in</i> | \$ 203,184.75 | \$ 157,926.25 | \$ 45,258.50 | 77% |
| | | | | |
| Local Adult | \$1,932,486.00 | \$1,888,260.80 | \$ 44,225.20 | 97% |
| <i>Carry-in</i> | \$ 102,264.44 | \$ 94,486.65 | \$ 7,777.79 | 92% |
| | | | | |
| Local Youth | \$2,004,263.00 | \$1,973,569.99 | \$ 30,693.01 | 98% |
| <i>Carry-in</i> | \$ 10,400.50 | \$ (2,313.10) | \$ 12,713.60 | 0% |
| | | | | |
| Local DW | \$1,377,807.00 | \$1,377,807.00 | \$ - | 100% |
| <i>Carry-in</i> | \$ 67,638.13 | \$ 67,588.13 | \$ 50.00 | 99% |
| | | | | |
| Total All Funds | \$6,336,082.00 | \$5,745,083.79 | \$ 590,998.21 | 90% |
| | \$1,547,620.89 | \$1,391,158.22 | \$ 156,462.67 | 89% |

As Montana completes its twelfth year of WIA services, the state is in a better position to analyze and compare data from previous years and use this data to develop more effective and efficient program elements and service delivery systems. In Program Year 2011, over **3,600** adults, youth and dislocated workers received intensive and training services under the Workforce Investment Act. Among the intensive and training services provided to participants were Work Experience and On-the-Job Training, short term prevocational training and occupational skills training. Services were provided with an overall investment of local and state resources totaling more than \$7,800,000. Some of these resources were invested in support systems, such as state administration. Some were invested in other statewide activities such as those described in the narrative section of this report. Rapid response services were also provided to many dislocated workers who were not listed as receiving intensive or training services.

The number of adults and dislocated workers that registered for services and the average cost per participant follows:

| | Participants | Cost Per Participant |
|--------------------|--------------|----------------------|
| Adults | 924 | \$3,101 |
| Dislocated Workers | 2,256 | \$ 863 |
| Youth | 775 | \$5,453 |

WIA funds were allocated per the funding formula as outlined in the State’s Five Year Strategic Plan. In PY 2011 the formula funds were directed to the BOS and CEP as follows:



| | Adult | Youth | Dislocated Worker |
|-----|------------------|------------------|-------------------|
| BOS | 80% \$ 1,540,192 | 84% \$ 1,687,589 | 85% \$ 1,175,269 |
| CEP | 20% \$ 392,294 | 16% \$ 316,674 | 15% \$ 202,538 |

TOTAL PY'11 WIA PROGRAM FUNDING

The total funding for Montana's WIA adult, youth and dislocated worker programs for Program Year 2011 was \$6,336,082. The chart below shows the percentage of the funding for each program.

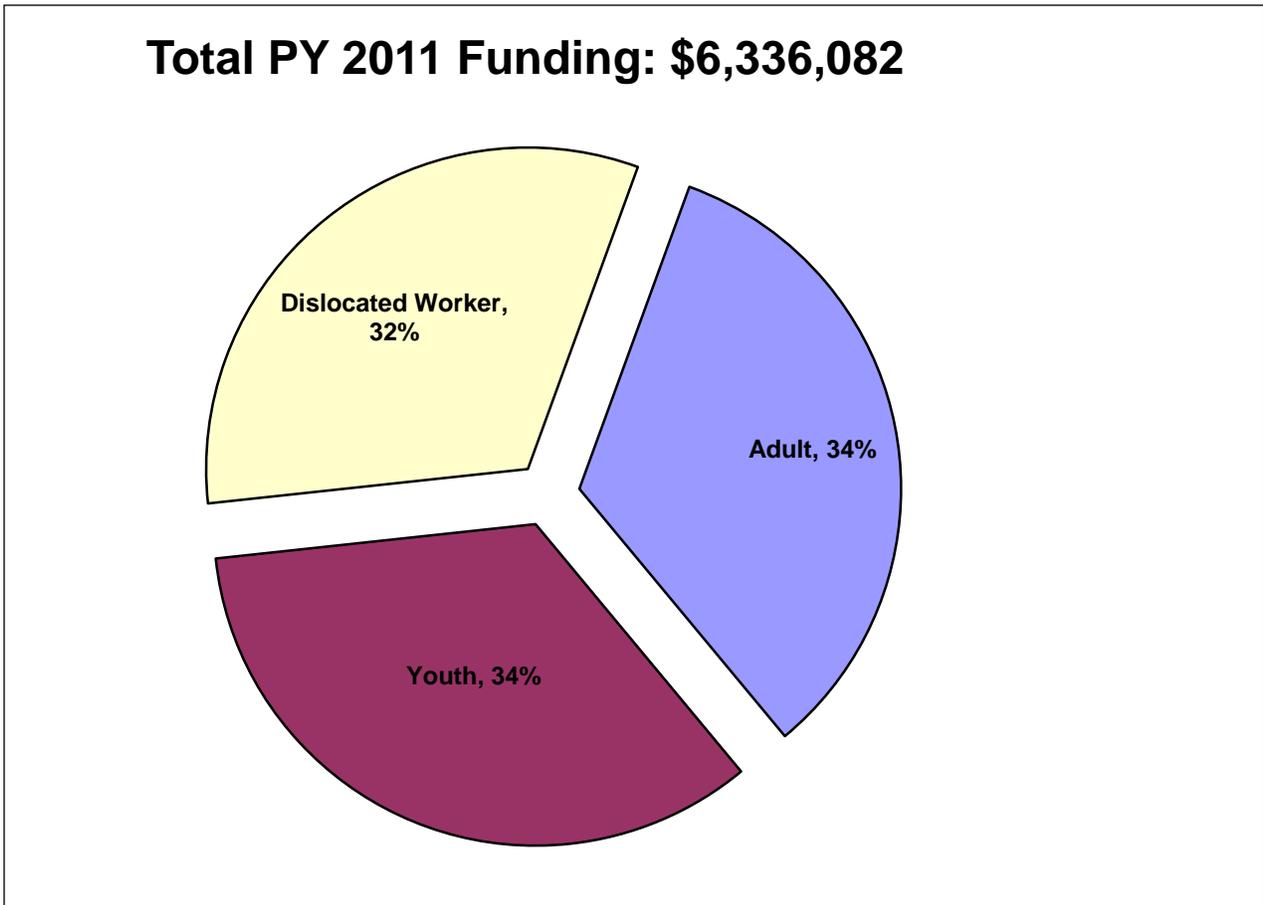


Table N - Cost of Program Activities

| Program Activity | Total Federal Spending |
|---|-------------------------------|
| Local Adults | 2,042,125 |
| Local Dislocated Workers | 1,481,447 |
| Local Youth | 2,033,754 |
| Rapid Response (Up to 25%) 134 (a) (2) (A) | 608,412 |
| Statewide Required Activities (Up to 15%) 134 (a) (2) (B) | 761,160 |

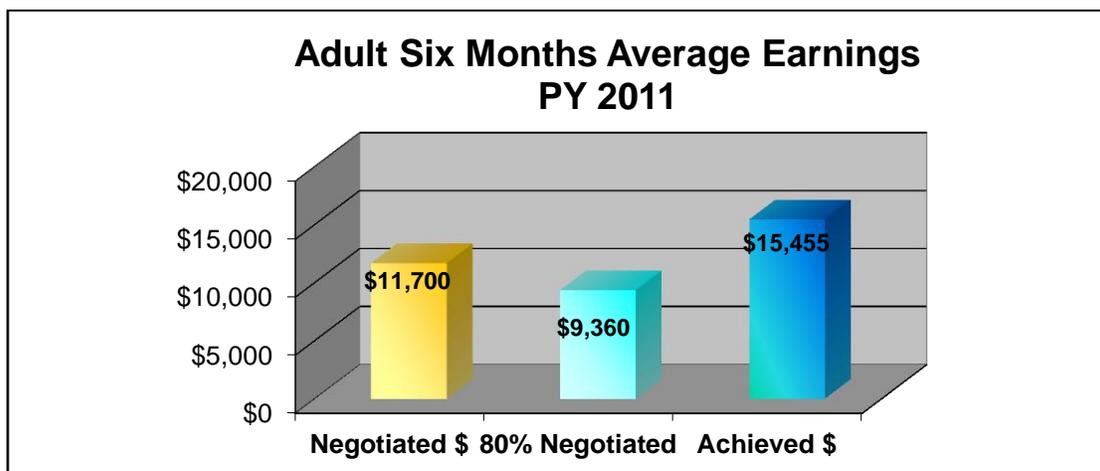
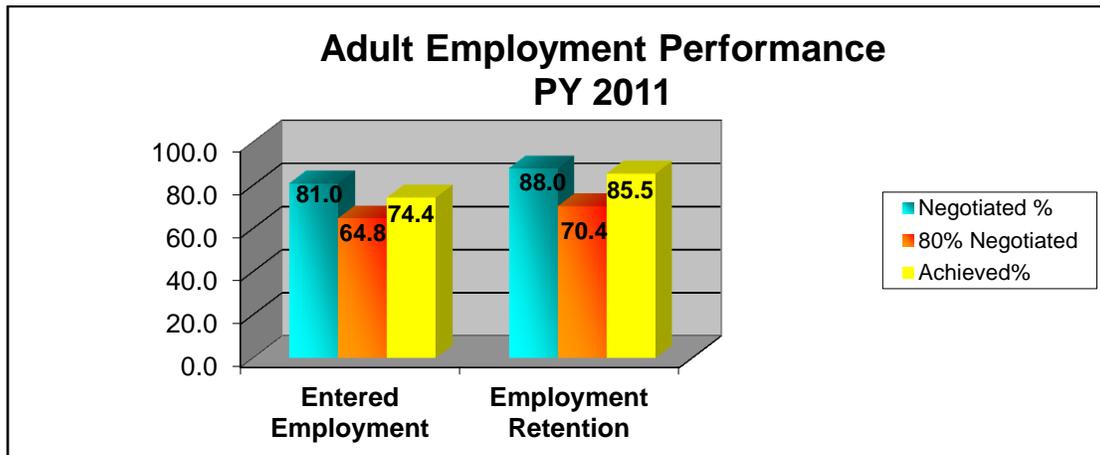
| Statewide Allowable Activities 134 (a) (3) | Program Activity Description | |
|---|---|-----------|
| | Technical Assistance for Local Providers | 27,840 |
| | MT Association of Counties | 5,698 |
| | Math and Science Initiative | 71,590 |
| | Work Keys | 728 |
| | Jobs for Montana Graduates | 49,500 |
| | Angel Fund | 23,403 |
| | Eureka Rural Development | 16,645 |
| | National Center for Health Care Informatics | 13,940 |
| | | |
| | | |
| | <i>Total of All Federal Spending Listed Above</i> | 7,136,242 |

WORKFORCE INVESTMENT ACT TITLE IB PROGRAMS

MONTANA'S WIA ADULT PROGRAM

In Program Year 2011 952 adults were registered to receive intensive and training services. Training services that were generally provided included: occupational skills training; entrepreneurial training; skill upgrading and retraining; workplace training and related instruction that included cooperative education programs adult education and literacy activities provided in combination with the training activities; and customized training with commitment by employer or group of employers to employ the individual when they successfully complete the program.

ADULT COMMON MEASURES PERFORMANCE ENTERED EMPLOYMENT/EMPLOYMENT RETENTION SIX MONTHS AVERAGE EARNINGS



NOTE: The Employment and Training Administration (ETA) negotiates performance at certain levels for each performance measure. States can pass performance by meeting 80% of the negotiated values for each measure.

ADULTS ACHIEVING SUCCESS

- *Janet was a widow, having lost her spouse to cancer, and was struggling to make ends meet in self-employment as a service provider for clients through Montana Works Solutions when she came in for assessment. She was so excited to learn of an OJT opportunity that would help provide her with new updated skills. She was co-enrolled through the Adult and OJT/NEG funding grants and entered a six-month, on-the-job training at Ravalli County Council on Aging. During that time she received training as a Bookkeeping/Accounting clerk. She completed her contract and is continuing to do very well in her subsequent continued employment with RCCOA. In follow-up visits with both her and her supervisor, they both report that things continue to go very well for her and she states she is grateful that she was able to utilize this type of training to gain important job skills.*
- *A 27 year old single mother of 3 on TANF was looking for a career in the medical field. After conducting the MCIS and much career counseling, she decided that she wanted to be trained as a CNA. In July she was trained at CNA Ect. and then received more training to be a CNA for hospice. Immediately after training, she was hired at a local nursing home and continues to work almost full time.*
- *At the time of one participant's enrollment (August 26, 2008) she was a single mother of two children, working as an Activity Assistant at the nursing home and grossing less than \$1,200 per month, she also received SNAP benefits. She enrolled in the nursing program. The WIA program assisted by paying part of her tuition and books, along with some supportive service payments for rent, utilities and scrubs. She completed her Associate of Science in Nursing on May 13, 2011, and became licensed as a RN on July 1, 2011. She has been working full-time at Glendive Medical Center Acute Care since approximately June 3, 2011, as a Registered Nurse making \$22.67 per hour, now grossing approximately \$3,530 per month.*
- *We enrolled a participant from Big Horn County last February who had worked the past fourteen years as a waitress at the same restaurant in Hardin. She had divorced seven years ago and was raising four teenagers on her own. She always had an interest in the medical field but had to put her desires on hold to support her family. The Purple Cow restaurant was closing and she received a lay-off notice that she would soon be out of work. She decided this was the time to pursue her passion! She was accepted into CNA training through the Big Horn Hospital Association. The YWCA was able to enroll her and provide services so that she could pay for the training and scrubs and shoes needed. She successfully completed the training and was hired at the hospital. She now earns a self-sufficiency wage in a field she loves! She has been on the job for seven months and continues to grow and thrive in the health care arena.*
- *Chad worked as handyman doing odd jobs and did not make a living wage. He qualified for the Adult Program and we were able to write an OJT with Montgomery Distillery. The distillery was a new business in Missoula and unique because of its downtown location. Due to the OJT opportunity, Chad was hired before they opened, he completed his OJT and makes \$15.38 per hour.*

- *We exited a 23 year old Native American male to employment. He is a married father of one child and is currently employed in Great Falls with a plumbing company. He completed the plumbing program at Montana State University-Northern in June 2010 and spent the last year looking for work in the Havre area. Without this program, he would not have been able to complete his training and gain employment at this level which has allowed him to better provide for his family.*
- *We have a participant we assisted with training at MT Tech. He is completing his Masters in Metal Engineering and has been offered a supervisory engineer position with Barrack Minerals in Elko, NV. He starts February 6 at \$65,000 a year. We assisted him through training money and supportive services that enabled him to stay in school. Shane originally enrolled in the Electrical Line Training as a Dislocated Worker after his service in the US Navy. I assisted him in locating back to Butte with his family, and then continuing his education at MT Tech with assistance from veteran's education programs. He and his wife Poppy, and beautiful son Michael are excited to start their next big adventure in Nevada.*
- *A participant exited in this quarter, obtained employment at St Peter's Hospital. This individual was a stay at home mom for several years. She helped her husband with his photography business, and he also worked full-time to support the family. This person's husband became ill and could not continue working. This left the burden to support the family up to her. She had been out of the formal workplace environment for so long, that she wasn't really sure where to start. This person was able to take advantage of the computer classes at CTI, get help with her resume and cover letter, and help in filling out applications. She is now working full-time, has health insurance for her family and can provide the basic needs.*
- *Mary, a 40 year old woman, contacted the office in September 2011 for assistance in completing training to become a C.N.A. Her husband had been injured several years ago and was unable to work. They have a 10 year old child. The family is on food stamps. Because the family has been unemployed for such an extended period of time, they had very few resources to draw on to pay for the training she needed. She was enrolled, completed her training through on-line courses through Miles City Community College. She completed the clinical portion of her training at Roundup Memorial Hospital in Roundup. The WIA Adult program assisted with tuition and books for the course and uniforms. She was able to secure employment with Health Care Services in Billings at \$14.75 per hour. She provides care for patients in their homes in the Roundup area.*

- *Despite the numerous obstacles placed before him, Mark has persevered and kept a positive attitude throughout his somewhat tumultuous enrollment. After successfully completing a CDL refresher course in Belgrade, he was set to begin orientation and training with a trucking company in Lewiston, Idaho. He was unable to completely pass their physical test (which was more stringent than the DOT test that he had already passed) and was sent home - to face the end of his unemployment insurance compensation. Subsequently, he made arrangements to enter the Swift driver/training program - but was unable to pass the hearing portion of their test. He is currently working with Vocational Rehabilitation to secure a hearing device, which is the only barrier to becoming gainfully employed as a driver with that company. In the meantime, Mark has obtained employment as a CDL driver with a local company and is maintaining self-sufficiency (and his positive attitude). He still intends to follow through with the Swift training program, which will provide a more significant wage.*
- *We had a participant who exited to employment for a wage of \$27.00 an hour as a Mammography Tech employed in Anchorage Alaska. This participant was enrolled in SNAP, WIA Adult, TESP, and SDH programs at CTI, as well as Voc-Rehab, and the Helena Job Service. This participant drove back and forth from Butte for two years to complete her Radiology Technologist degree, received upon her graduation from Montana Tech in May 2011. She is a single mom, and overcame several barriers, to include: childcare, transportation, housing, and additional education. Once she completed her degree, she was able to test with the state for her license. After receiving her license and beginning her job search, she found that the field was very competitive, and that she needed additional education for a certification in a specific area, as well as experience on the job. Partnering programs were able to come together to get her the required additional education, in which she completed and became certified. The TESP program was able to provide her with on the job training at St Peter's Hospital where she was able to complete her additional education by performing work under supervision. She became certified in Mammography in May 2012. The experience she received with the hospital allowed her to be very competitive in the job market and in June 2012 accepted a position with Providence Imaging in Anchorage, Alaska for a wage of \$27.00 an hour and a relocation package of \$12,000.00. She currently resides in Alaska where she and her son are thriving in their new environment in a job that she holds compassion and a love for what she does.*
- *Last quarter the program helped one of our participants earn a Degree in Occupational Health and Safety from Montana Tech. She has accepted a position with ONEOK Partners out of Sidney, Montana as an ESH Coordinator. Her starting wage is \$70,000 annual, plus a very impressive signing on package with the company starting bonus, along with yearly profit sharing bonuses.*

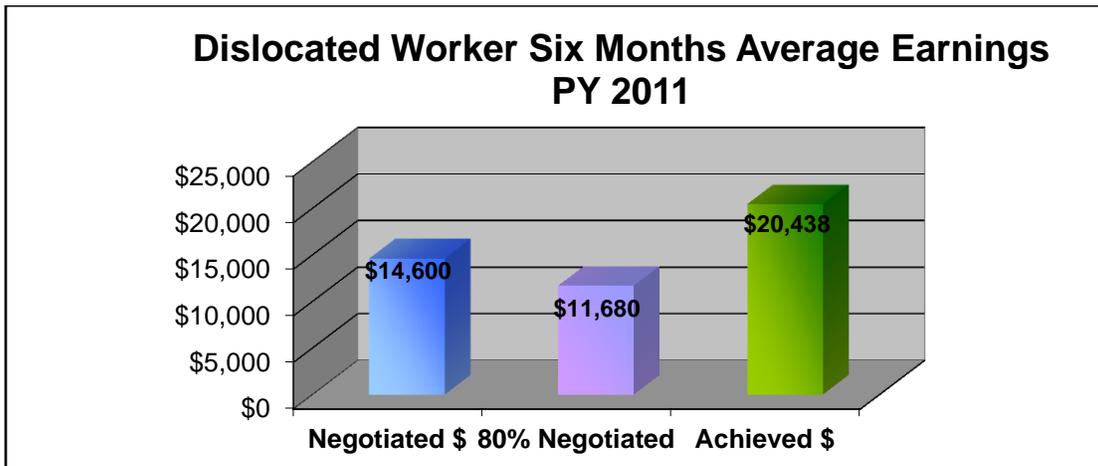
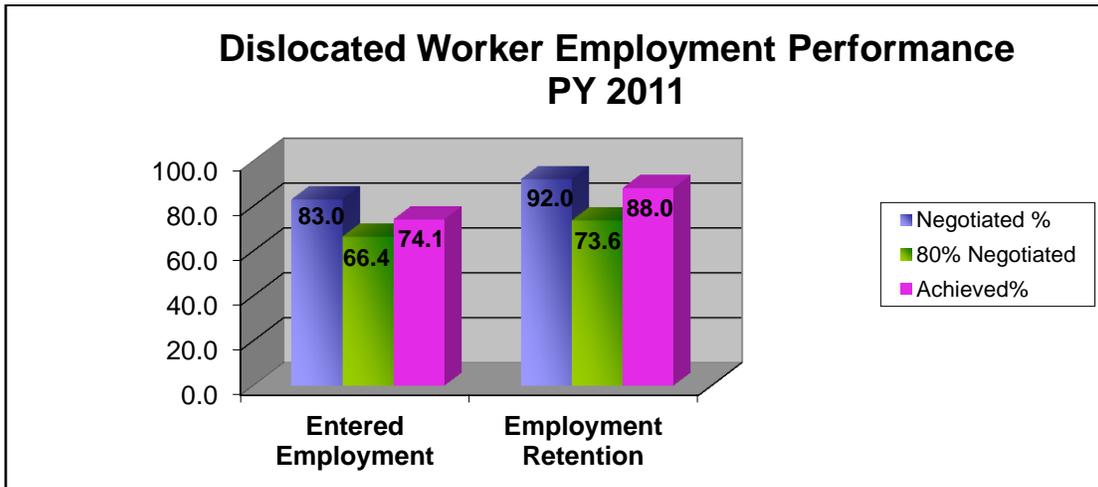
- *A female, Native American participant was enrolled in April of 2012. She was pregnant when we enrolled her and was bouncing from house to house. She was having financial difficulty and felt unprepared about her future. She had already completed one year of college in Ft. Belknap but was struggling trying to find a job. Due to her interests in social work we set her up in a WEX site at Social Services in Ft. Belknap where she worked in the Domestic Abuse program. By providing her a WEX she was able to get her foot in the door and this has increased her chances of becoming hired after she has her baby. She is enrolled to go back to college in the fall and Social Services said they would be willing to work around her schedule. Because of the work experience she has, she is able to show that she is employable and reliable. The work experience also gave her the confidence she needed to further her employment and educational goals.*
- *Tim is a 38 year old who enrolled in the Adult program in July of 2009. He and his wife had owned and operated their own business for several years, but due to the economic downturn, lost their business. They moved with their 5 children to Lewistown to allow Tim to attend school at MSU-Northern's Lewistown Nursing Program. He completed his education and graduation in May 2012. He took his Boards in June and is now a registered nurse. He accepted employment in Michigan and moved his family there in June. His hourly wage is over \$25 an hour and he is very happy with his employment. He is looking to further his education in the nursing field as opportunities arise.*
- *Clint came in seeking a change in career as he has been working in retail & fast food Customer Service type positions. He was low income & receiving SNAP benefits. Clint's interests were in Health Care related fields and in researching those fields, came up with a Dental Assisting Training available at the Lifelong Learning Center. We enrolled Clint in the WIA Adult Program. This training was short term; he would receive a Certificate and would be able to find employment as quickly as possible. Clint volunteered at Partnership while he was in this training & ended up being hired by this employer after he completed his training.*
- *In June of 2009 the Helena Job Service enrolled Jennifer into the Adult Program after she had just moved to Montana from the state of California. The Helena Job Service assisted Jennifer with services such as rent and automotive repairs. In August of 2011 Jennifer successfully completed her program and immediately obtained employment with a local doctor's office within the community. During her latest follow-up phone call she voiced her appreciation about the services that she had received and envisioned herself retaining her employment for the foreseeable future.*

MONTANA'S WIA DISLOCATED WORKER PROGRAM

Achieving Re-employment for Montanans

In Program Year 2011, a total of **1,584** dislocated workers were served in the formula funded WIA Dislocated Worker program. In addition, certain groups of dislocated workers received services through National Emergency Grants (NEGs) funded with discretionary Dislocated Worker funds. Participants in these programs received services such as remedial training, classroom training, skill upgrade and retraining, workplace training, relocation assistance to a new job, assistance in buying tools and equipment needed for training or a job, and various other supportive services needed while a person is advancing their skills or looking for work.

DISLOCATED WORKER COMMON MEASURES PERFORMANCE ENTERED EMPLOYMENT EMPLOYMENT RETENTION SIX MONTHS AVERAGE EARNINGS



NOTE: The Employment and Training Administration (ETA) negotiates performance at certain levels for each performance measure. States can pass performance by meeting 80% of the negotiated values for each measure.

DISLOCATED WORKERS ACHIEVING SUCCESS

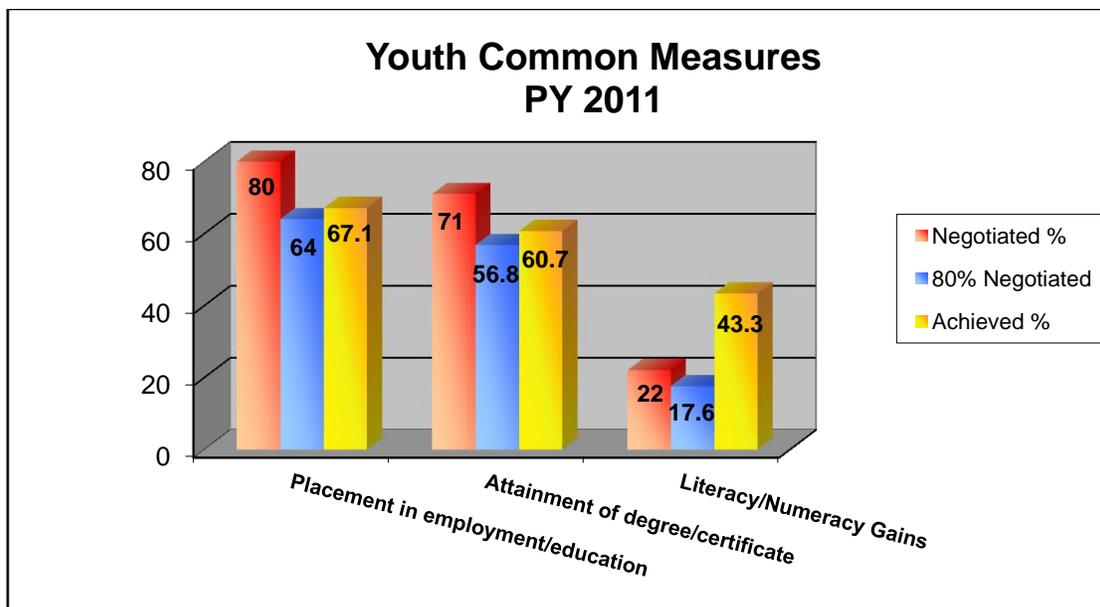
- **Kristopher** of Butte began with the TAA program in June of 2009 stating he wanted to attend school to become a **Diesel Mechanic**. He was laid off at Montana Tunnels in May of 2009. Kris wanted to go to Helena COT because he felt it was the best program around, signed up and started attending classes in August of 2009. He has been an excellent student from the beginning, in fact, made the Dean's list for most of his semesters. He graduated on Friday, May 6th and began work on Monday, May 9, 2011. He is working at New Holland Trader Company in Belgrade, Montana at a starting wage of \$18.00 per hour. He will be commuting on a daily basis, but does not want to leave Butte for family reasons. Kris was very proactive while going to school. Every holiday and summer break he had, he spent working for Montana Resources in Butte to hone his skills with hands on experience. I think Kris will do very well in his future. He is dedicated, resourceful and fully committed.
- **Alexandria** from Kalispell was laid off from Semitool in January 2009. She took advantage of her opportunity to retrain under TAA. She began training at Flathead Valley Community College immediately after layoff and graduated as a **Medical Administrative Assistant** in May 2011. She found a job at an orthodontist office in Wisconsin before she graduated and moved there the day after graduation using her TAA relocation benefits.
- **Beau** was laid off from Columbia Falls Aluminum Company in July of 2008 where he was making \$20/hr as laborer. Though he had an associate's degree at the time, this level of education was not useful to him in connecting to employment. He spent many months searching for work. During this time he explored a number of training options that would lead him to a stable career that he and his young family could depend on in an economy where manufacturing jobs were dwindling. In June of 2009, Beau entered the **Occupational Safety & Health** program at Montana Tech in Butte. He worked diligently at his studies and earned nearly all A's. During his last semester he requested to do his last two classes on-line so he could be poised to accept employment (and relocation if he needed to) at any time. Beau graduated in December 2010 and accepted employment one week later as an **EHS Training Specialist** at Petrohawk Energy Corporation in Tulsa, OK for \$56K/year. Thanks to TAA he was able to obtain the training he needed to move quickly into the workforce in a high demand, high wage position. CFAC NEG was also able to assist with the relocation expenses for him and his family.
- **Dennis** was employed at Plum Creek Lumber in Pablo from 1986-2009 until being laid off June 18, 2009, when the mill closed. Dennis made a good salary with good benefits as a Forklift Operator. In the aftermath of the business closure, Dennis searched within our area as well as outside of the County for suitable employment. In July 2010 Dennis approached his Case Manager with the idea of doing an **OJT** and learning the **Meat Cutting** trade. The Case Manager contacted Frank's Meat, in Pablo and explained the TAA OJT program. The company was very interested and a contract was subsequently signed, with Dennis starting training in meat cutting on July 15, 2010. He started working training on July 26, 2010 @ \$10/hr and in January received a \$2/hr raise. Dennis continues learning the trade is making a livable wage. It has been a win-win for both Dennis and the employer. Dennis has completed his OJT successfully and continues working full time.

- *Albert* was employed at Plum Creek in Pablo, MT from January 2006 to January 2009 until being laid off. At the time of lay off Albert had made a good salary as a Millwright. He has a young family and felt that he had good marketable skills and would find employment. After submitting resumes to various employers with no outlook for employment, he began to look at training. In July of 2009 he came to the local Job Service to discuss what options he had available through TAA. Al started his TAA training in **Recreation Power Equipment Repair** the following September and graduated with high honors the following May 2010. After completion of graduation Al submitted applications to various local employers. Al was contacted by a local company, S&S Sports who specialize in all terrain motor vehicles and personal watercraft for an interview. The employer was interested but did not feel that Al had the experience he needed to, the Case Manager contacted S&S Sports to discuss a possible NEG-OJT, and the employer was very interested in this program. A contract was written up and signed by the employer. Al started his OJT in July of 2010; the employer has been extremely pleased with Al's abilities. Al has completed his OJT at this time and continues full time employment with S&S Sports.
- *Joe* was a laid off laborer from Columbia Falls Aluminum Company when the plant initially began curtailment in July 2008 -which lead to its ultimate closure. He was unable to qualify for Unemployment Insurance at the time, and was only able to find a part time job at half his layoff wage. He relied on SNAP assistance to help take care of his family. Once he became UI-eligible he was able to pursue TAA training for a new occupation, outside of the dwindling aluminum industry. He earned an Associate's Degree in **Information Technology** at Flathead Valley Community College and took every opportunity to improve his marketability by also taking non-required IT Certifications with support from Columbia Falls Aluminum Company National Emergency Grant. He earned excellent grades. As always, Joe worked ahead to prepare for his new career and was applying for jobs prior to graduation. Recently, he was offered an IT job – locally. His “dream job”. He starts next week and the employer is going to work around his school schedule to allow him to graduate next month. I have no doubt that his opportunity to go to college and connect with this job will change his life by again enabling him to provide for his family and continue be a strong role model to his children.
- *John* was employed at Plum Creek Timber Company in Pablo, MT, from August 3, 1990 until being laid off on July 31, 2009, when the mill closed. John had made a good salary as a Plant Superintendent, supervising all products at the plant. John had sent resumes to mills outside Lake County in the hopes of finding a good paying position. One of the places he applied to was Silver City Lumber in Three Forks, MT. He indicated he would like the job but that it was in sales, and that while he had many years supervising products and was familiar with wood products, he had no experience in sales. The Case Manager contacted Silver City Lumber and explained the TAA OJT program. The company was very interested, and a contract for **TAA OJT** training was subsequently signed, with John starting training in **Sales and Marketing** on January 4, 2010. It was felt that the OJT would provide training in sales and marketing of the wood products for the mill, and also provide a stable salary while he established a clientele base, as he would be moving to a commission-based pay structure upon completion of the training period. John did very well during OJT training. He was able to bring new customers to the mill; he learned the product line very quickly and received training in sales. John completed his OJT in the fall of 2010. In the two quarters following completion of the OJT, Silver City has reported \$28,000 in gross wages for John.

MONTANA'S WIA YOUTH PROGRAM

In PY'11 520 youth enrolled in the WIA youth program. There are ten youth service providers in Montana that provided WIA services to Montana's youth. Nine are Human Resource Development Councils and Career Training Institute which is a private non-profit agency.

YOUTH COMMON MEASURES PERFORMANCE YOUTH PLACEMENT IN EMPLOYMENT/EDUCATION ATTAIN DEGREE OR CERTIFICATE LITERACY/NUMERACY GAINS



NOTE: The Employment and Training Administration (ETA) negotiates performance at certain levels for each performance measure. States can pass performance by meeting 80% of the negotiated values for each measure.

YOUTH ACHIEVING SUCCESS

- *We had two youth obtain very good paid internships this summer due to prior work history on our program. We had one who received a scholarship from Howard University where he worked to “explore the use of paper as a micro-electro-mechanical sensing device”. He actually helped write a professional paper for a journal article at the end of the summer. The other youth worked with NASA and received a \$20,000 scholarship and will be employed there next summer as a paid intern. She kept in contact with her Youth Advisor throughout the summer. When she returned, she enrolled in the Salish Kootenai College. She is currently working on her Bachelor’s Degree with the scholarship monies.*
- *Last winter, the Montana Department of Labor and Industry sent out a notice about a Med Start Camp at the University of Montana on July 10-15. The camp was designed for juniors and seniors in high school who were interested in careers in medical fields. The case manager presented this information to Farrah N., a junior at Capital High School. Farrah had attended the 2010 Science Camp and served as a peer leader for the 2011 Science Camp. Farrah has always expressed interest in a career in science or medicine, specifically mentioning that she is particularly interested in forensic science. CTI helped Farrah complete the application, provided gas money, funds for clothing and a \$100 stipend upon completion. Farrah spent the week living on campus at the University of Montana learning about medical career options with 20 other students. As of September, Farrah is a senior at Capital High School. She is taking a CSI (crime scene investigation) course at Helena High. Farrah now sees herself completing a two-year transfer degree at UM Helena College of Technology after high school graduation and then transferring to another post-secondary institution to complete a forensic science degree.*
- *Kellie joined the WIA Youth Employment and Training Program in April 2011. Before enrolling into the program Kellie was unemployed and had never had a job. She was living on her own and raising three young children. Kellie’s career goal was to get into the medical field and become a Certified Nursing Assistant. She started a paid work experience at the Awekualawaache Care Center in Crow Agency as an Activities Aide in July. Kellie never missed a day of work, was respectful, polite, and went the extra mile for her fellow employees and the center’s residents. Kellie made such a positive impression that after a little more than a month at the paid WEX, the Care Center decided to hire her on as the Activities Director.*
- *We have had one youth in Great Falls who was placed in our main office working with the Deputy Director. She has been assisting with the paperwork needed for grant writing and preparing for meetings. Recently, this youth has been given an award for being the most improved youth at school. She has also been nominated for the Heisey Award at school.*
- *Bobby started training at the Laborers/AGC training center in April, 2011. The training was ideal for his situation since he was living in his car and eating at God’s Love. Trainees are allowed to stay in the dorms at the training center and meals are provided during the week. Bobby completed numerous courses at the training center including safety, first aid/cpr, flagger certification, confined space worker, personal protective equipment, scaffolding, process safety management, silica awareness, soil and compaction, tool recognition, pipeline safety, and asbestos abatement. CTI provided support services including dues and gas while Bobby was in training. Bobby was called out in July and worked for Tamietti Construction at the Toston Bridge for almost a month where he made \$21.42 an hour. At the end of August, Bobby went to work for an asbestos abatement firm in Wyoming where he was involved with removing lead from a power plant in Kemmerer. Bobby made \$16.49 an hour plus received free housing and \$60 a day for food and incidentals. At the end of September he was laid off. Bobby has since returned to the training center to continue classes through the month of October.*

- Erlise is a 16 year old Native American female residing in Billings, MT. She was a high school dropout, who lacked a solid work history, and who was unemployed. Erlise initially enrolled into our Alternative Education Program to work on earning a General Equivalence Degree. She had a strong attendance record in the Education Program, thus demonstrating that she was indeed committed in her endeavor of a GED. In September 2010 we enrolled Erlise into the WIA Youth Employment & Training Program. According to her first TABE test, she was basic skills deficient. Throughout Erlise's time on the program, she would split time living with her mother in Yellowstone County and her father in Big Horn County. Our program has been especially grateful for our working relationship with the Adult Education Instructor in Big Horn County, she communicates regularly with us about participants who are enrolled in both programs. This was especially helpful in the case of Erlise, and because of our relationship with the Adult Education Instructor in Big Horn County, Erlise was able to make a smooth transition and continue to work toward her GED. Erlise relocated back to Yellowstone County and made another smooth transition to continue her studies and GED work here at HRDC. On July 28, 2011 Erlise officially earned a General Equivalence Degree. She currently works two jobs and has moved to Hardin, Montana.
- Micheal is a 17 year old male who enrolled in the WIA Youth Employment & Training Program in March of 2011. Due to some social difficulties at his high school; Micheal was working on his academics in a homebound program. Unfortunately, he had insufficient credits and had been informed that he would have to drop out of school at the end of the year. The prospect of earning a General Equivalence Degree did not appeal to Micheal, but after some mentoring and words of encouragement, Micheal decided to work toward a GED at HRDC's Alternative Education Program. Initially, Micheal struggled with attendance, and when he did show he put in very minimum effort. Once again with support from the Youth Employment & Training Program staff, along with the new Educational Instructor, Micheal has become the Alternative Education's exemplary student. He comes every day with near perfect attendance for the last several months. In addition, Micheal is no longer basic skills deficient in reading. He is on pace to earn his GED this spring.
- Briana joined the WIA Youth Employment and Training Program in May 2011. Prior to enrollment Briana was a 19 year old High School graduate who was unemployed and had very little work history. Her TABE results demonstrated that she was basic skills deficient in both reading and math. Briana was living with and caring for her Grandfather. She was interested in the Culinary Arts field, but more so wanted to express herself artistically. Briana was placed at HRDC's Grow Thru Art Program as an Art Facilitator Aide. During her tenure on the program Briana attended her remediation hours and participated fully at her paid work experience. After the required sixty hours of Educational Instruction Briana took the post-TABE test and blew her previous scores out of the water, scoring 12.9's in both subjects. Furthermore, Briana applied for a position at HRDC in a different program. The program operated in the same building as the Grow Thru Art Program, and because Briana made such a good impression not only with her paid WEX co-workers, but with the other HRDC employees in the building, she was hired as an Eligibility Specialist in the LIEAP program. Briana was also appointed by her peers to be the Chairperson for EPIC (Empowering Peers: Igniting Change), a youth-led council at HRDC. She works with staff on a volunteer basis to prepare agendas, research service projects, and promote the work of EPIC in the community.
- Jessica was enrolled in the WIA Youth Employment & Training Program in the beginning of March 2011 as a 19 year old high school graduate from Broadview, who was married, pregnant, and expecting her first child. In addition, Jessica was reliant upon government assistance. After completing her work readiness activities, Jessica selected Connoisseur Media as her paid work experience site; she worked there as an Administrative Assistant. Although Jessica lived in Broadview, she made the thirty mile commute to Billings three or four days a week. Toward the end of her paid work experience, a verbal agreement was established where Connoisseur Media agreed to hire on Jessica after her paid WEX. Unfortunately, it was not feasible for them at that time. Despite this unfortunate setback, Jessica searched for employment and landed a position in the sales and embroidery field. Jessica is a true example of where determination and hard work can get you; she didn't let a minor setback get in her way but instead forged ahead to meet her goals.

- *Erlise is a 16 year old Native American female residing in Billings, MT. She was a high school dropout, who lacked a solid work history, and who was unemployed. Erlise initially enrolled into our Alternative Education Program to work on earning a General Equivalence Degree. She had a strong attendance record in the Education Program, thus demonstrating that she was indeed committed in her endeavor of a GED. In September 2010 we enrolled Erlise into the WIA Youth Employment & Training Program. According to her first TABE test, she was basic skills deficient. Throughout Erlise's time on the program, she would split time living with her mother in Yellowstone County and her father in Big Horn County. Our program has been especially grateful for our working relationship with the Adult Education Instructor in Big Horn County, she communicates regularly with us about participants who are enrolled in both programs. This was especially helpful in the case of Erlise, and because of our relationship with the Adult Education Instructor in Big Horn County, Erlise was able to make a smooth transition and continue to work toward her GED. Erlise relocated back to Yellowstone County and made another smooth transition to continue her studies and GED work here at HRDC. On July 28, 2011 Erlise officially earned a General Equivalence Degree. She currently works two jobs and has moved to Hardin, Montana.*
- *Micheal is a 17 year old male who enrolled in the WIA Youth Employment & Training Program in March of 2011. Due to some social difficulties at his high school; Micheal was working on his academics in a homebound program. Unfortunately, he had insufficient credits and had been informed that he would have to drop out of school at the end of the year. The prospect of earning a General Equivalence Degree did not appeal to Micheal, but after some mentoring and words of encouragement, Micheal decided to work toward a GED at HRDC's Alternative Education Program. Initially, Micheal struggled with attendance, and when he did show he put in very minimum effort. Once again with support from the Youth Employment & Training Program staff, along with the new Educational Instructor, Micheal has become the Alternative Education's exemplary student. He comes every day with near perfect attendance for the last several months. In addition, Micheal is no longer basic skills deficient in reading. He is on pace to earn his GED this spring.*
- *Briana joined the WIA Youth Employment and Training Program in May 2011. Prior to enrollment Briana was a 19 year old High School graduate who was unemployed and had very little work history. Her TABE results demonstrated that she was basic skills deficient in both reading and math. Briana was living with and caring for her Grandfather. She was interested in the Culinary Arts field, but more so wanted to express herself artistically. Briana was placed at HRDC's Grow Thru Art Program as an Art Facilitator Aide. During her tenure on the program Briana attended her remediation hours and participated fully at her paid work experience. After the required sixty hours of Educational Instruction Briana took the post-TABE test and blew her previous scores out of the water, scoring 12.9's in both subjects. Furthermore, Briana applied for a position at HRDC in a different program. The program operated in the same building as the Grow Thru Art Program, and because Briana made such a good impression not only with her paid WEX co-workers, but with the other HRDC employees in the building, she was hired as an Eligibility Specialist in the LIEAP program. Briana was also appointed by her peers to be the Chairperson for EPIC (Empowering Peers: Igniting Change), a youth-led council at HRDC. She works with staff on a volunteer basis to prepare agendas, research service projects, and promote the work of EPIC in the community.*
- *Jessica was enrolled in the WIA Youth Employment & Training Program in the beginning of March 2011 as a 19 year old high school graduate from Broadview, who was married, pregnant, and expecting her first child. In addition, Jessica was reliant upon government assistance. After completing her work readiness activities, Jessica selected Connoisseur Media as her paid work experience site; she worked there as an Administrative Assistant. Although Jessica lived in Broadview, she made the thirty mile commute to Billings three or four days a week. Toward the end of her paid work experience, a verbal agreement was established where Connoisseur Media agreed to hire on Jessica after her paid WEX. Unfortunately, it was not feasible for them at that time. Despite this unfortunate setback, Jessica searched for employment and landed a position in the sales and embroidery field. Jessica is a true example of where determination and hard work can get you; she didn't let a minor setback get in her way but instead forged ahead to meet her goals.*

WIA SERVICES PROVIDED TO ADULT AND DISLOCATED WORKERS

INTENSIVE AND TRAINING SERVICES

July 1, 2011 to June 30, 2012

| | ADULT | DISLOCATED WORKER |
|--|-------|----------------------|
| ENROLLED | * 697 | * 1,357 |
| INTENSIVE SERVICES | | |
| Case Management | 617 | 1,195 |
| Counseling and Career Planning | 134 | 611 |
| Individual Employment Plan Development | 639 | 1,256 |
| Short Term Pre-Vocational | 46 | 81 |
| Temporary Gap In Services | 6 | 13 |
| Job Search | 193 | 178 |
| Out of Area Job Search | 4 | 118 |
| EMPLOYMENT RELATED EDUCATION | | |
| ABE/Literacy Combined with Training | 1 | 14 |
| Combined Workforce Training with Related Instruction | 0 | 2 |
| Entrepreneurial Training | 0 | 0 |
| Occupational Skills Training | 394 | 796 |
| Training-Related Fees/Materials/Supplies | 206 | 467 |
| Skills Upgrade & Retraining | 31 | 187 |
| WORKSITE LEARNING | | |
| Apprenticeship | 0 | 3 |
| Customized Training | 0 | 0 |
| On -the-Job Training | 29 | 82 |
| Work Experience | 44 | 0 |

WIA SERVICES PROVIDED TO YOUTH

July 1, 2010 to June 30, 2011

| | |
|--|-------|
| ENROLLED | * 520 |
| YOUTH SERVICES | |
| Individual Service Strategy Development | 487 |
| Tutoring, Study Skills, & Instruction Leading to Completion | 39 |
| Alternative Secondary School Services | 16 |
| Summer Employment Opportunities | 5 |
| Paid & Unpaid Work Experiences Including Internships and Job Shadowing | 360 |
| Occupational Skills Training | 20 |
| Leadership Development Opportunities | 56 |
| Supportive Services | 162 |
| Adult Mentoring During Participation & Subsequent Period | 244 |
| Follow-up services | 170 |
| Comprehensive Guidance and Counseling | 139 |
| Training-Related Fees/Materials/Supplies | 16 |
| Youth Stipends | 36 |
| Youth Incentives | 207 |

* This information was pulled directly from MontanaWorks and may reflect some discrepancies from other total enrollment numbers in this report.

EVALUATION OF WORKFORCE INVESTMENT ACTIVITIES

Program Year 2011 continued to mark the strengthening of partnerships within Montana's workforce system and the continuous improvement journey that began several years ago. The mission of the workforce system is to develop a collaborative, integrated, customer driven, customer friendly, workforce investment system that is responsible to all customers, continually improves the services provided, and which meets the needs of Montana's workers and business by providing workers with skills needed by business and businesses with the skilled workers they require.

Montana has a number of methods to use in evaluating workforce investment activities.

- ◇ Annual monitoring of WIA Title IB adult, youth and dislocated worker service providers by the State WIA oversight agency. Monitoring is conducted on the previous program year's activities and starts after July 1st of the new program year so the first monitoring of PY'11 will be in August 2012. Monitoring includes a comprehensive review of local fiscal and management information systems, provider agreements and the eligible training provider application process. Written reports are prepared and submitted to the service providers by the State oversight staff conducting the review. All written reports are available for review by the Governor's State Workforce Investment Board upon request. Traditionally, the results of the reviews and interviews with service provider staff are positive from the viewpoint of oversight staff and service providers.
- ◇ Customer Satisfaction surveys of participants and employers is not required for WIA performance however the information resulting from the customer satisfaction survey is an important tool in ensuring services meet the needs of customers and is shared, as appropriate, with appropriate administrative and line staff and used to improve WIA service delivery.
- ◇ Through Data Element Validation
 - Data element validation evaluates the accuracy of participant data used to generate annual WIA performance reports. The process compares source documentation in participant files, such as eligibility documentation, to selected information pulled from a sample of exited participant records. Data element validation is critical to ensure that performance results of Montana's WIA program are reasonably accurate. Each state is required by the U.S. Department of Labor (USDOL) to complete this process.
 - Montana staff completed data validation of WIA participant data for PY 2010. Staff visited all WIA service providers, including Job Service offices; Human Resource Development Councils; and nonprofit human service agencies. Staff reviewed approximately 470 participant files for the Adult, Dislocated Worker, and Youth programs. Data validation for PY 2011 will start in October 2012.
 - Montana's WIA operations are not typical to other states. Management Information System (MIS) and Unemployment Insurance resources are available to state MIS staff on a daily basis, which makes validating many items on the data validation worksheets easy to accomplish.

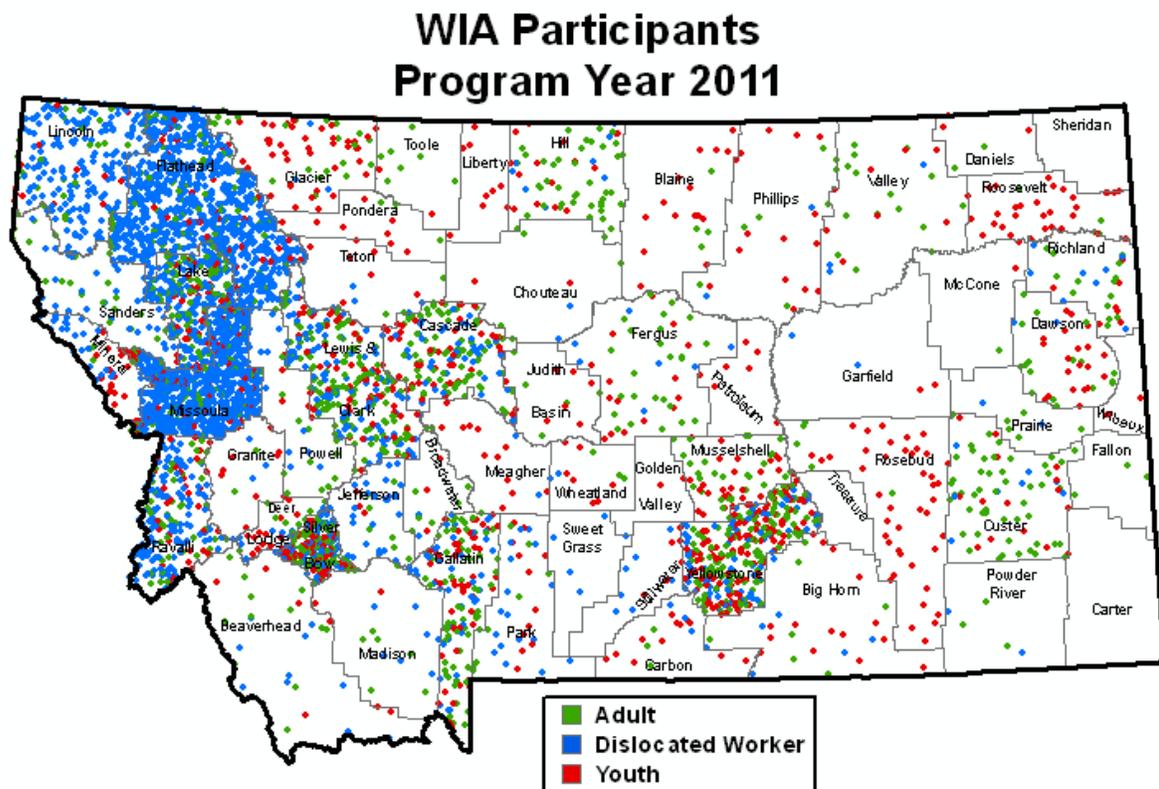
WIA PARTICIPANT INFORMATION, PROGRAM YEAR 2011

DEMOGRAPHICS, CHARTS AND GRAPHS

The WIA program served 3,098 participants who received staff-assisted services during Program Year (PY) 2011. This program year covered the time period July 1, 2011 through June 30, 2012.

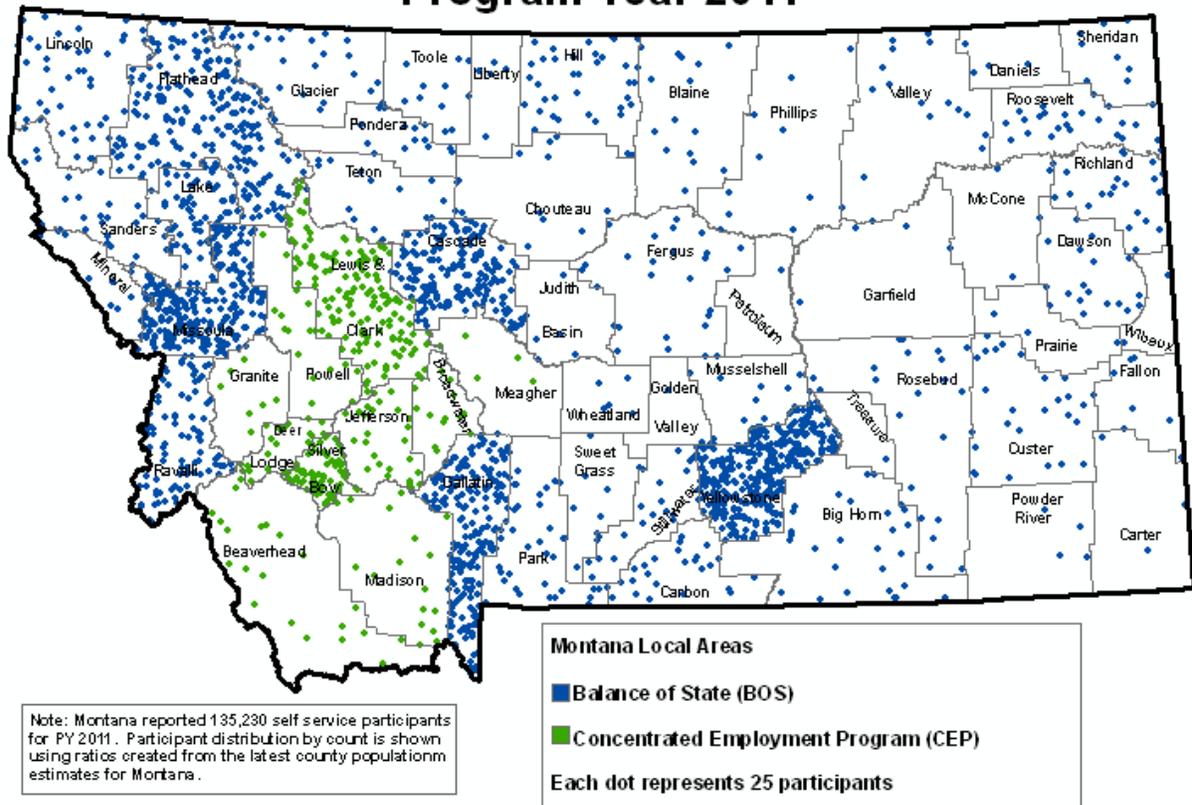
Data for this study was extracted primarily from Montana's PY 2011 annual WIASRD file, submitted in September 2012. MontanaWorks was used as a source for some of the data, as well as labor market information showing unemployment data by county.

The following maps show distribution of WIA participants in each county. Most WIA participants are concentrated in urban counties, although almost all counties served participants in either the WIA Adult, WIA Dislocated Worker, or WIA Youth programs.



PY 2011 participant numbers decreased from PY 2010 levels somewhat in the WIA Adult, Dislocated Worker, and Youth programs. The majority of participants served were located predominately in the western half of the state, although service providers provide outreach services to rural areas.

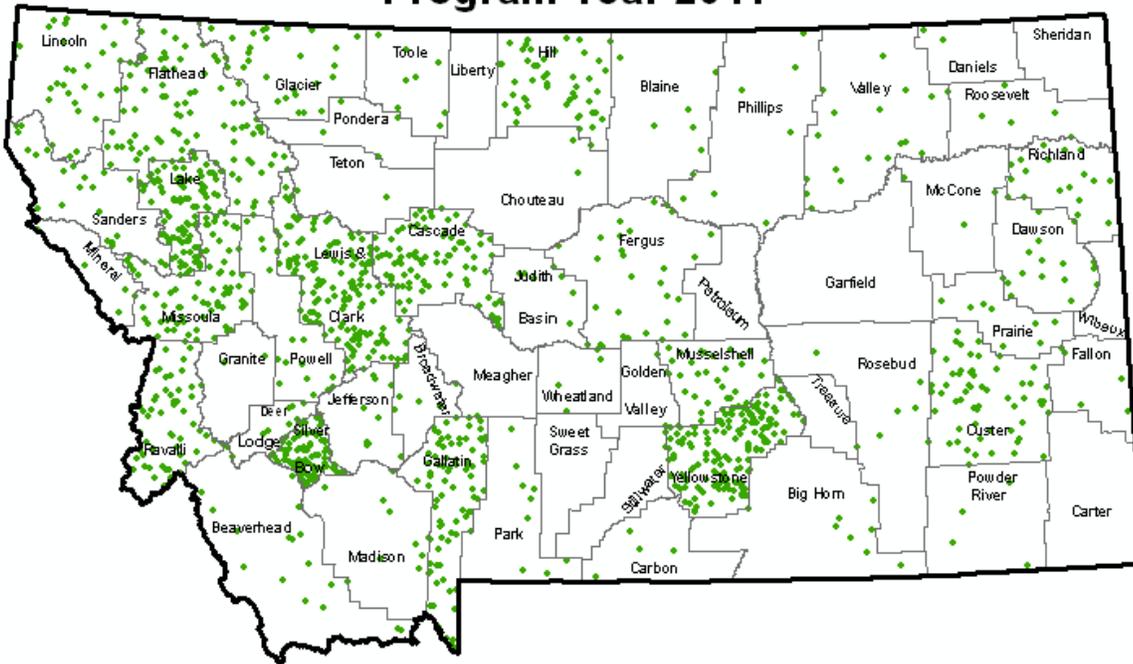
WIA Self Service Adults Program Year 2011



Self-Service participant numbers increased from PY 2010 levels. Self-service activities are those core services made available and accessible to the general public. These services are designed to inform and educate individuals about the labor market, their employment strengths and weaknesses, and the range of services appropriate to their situation. These services do not require significant staff involvement with the individual in terms of resources or time.

Participants are counted in self-service activities when they log into the jobs.mt.gov website and either conduct job searches or access career guidance or labor market information. The majority of participants who use these self-service functions are located in Montana's more urban areas, although access is available to anyone who has internet access.

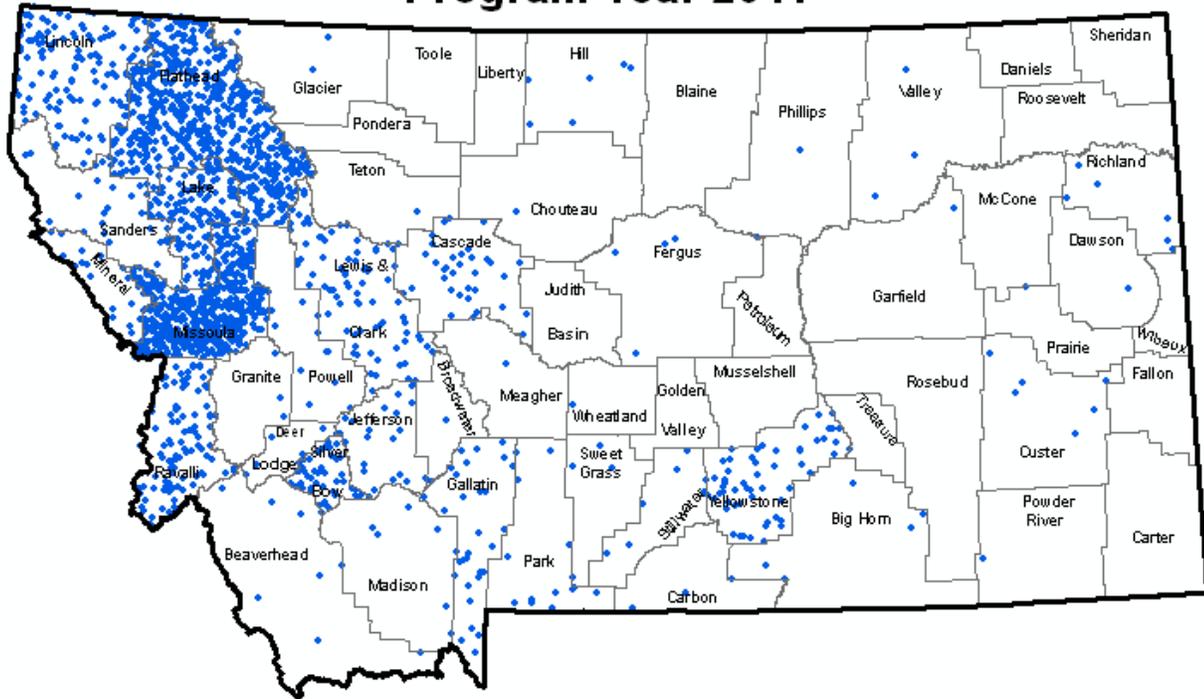
WIA Adult Participants Program Year 2011



WIA Adult services were provided to participants in all counties except Carter, Garfield, Meagher, Sheridan, Sweet Grass, and Wibaux counties. These counties are very rural and do not have a large population base. All but Meagher County have unemployment rates well below the state's 12-month average unemployment rate for July 2011-June 2012. The 12-month average unemployment rates for these counties that correlate to PY 2011 are as follows:

| Area | Unemployment Rate |
|--------------------|-------------------|
| MONTANA | 7.1 |
| CARTER COUNTY | 3.2 |
| GARFIELD COUNTY | 3.9 |
| MEAGHER COUNTY | 7.3 |
| SHERIDAN COUNTY | 3.2 |
| SWEET GRASS COUNTY | 3.1 |
| WIBAUX COUNTY | 3.4 |

WIA Dislocated Worker Participants Program Year 2011



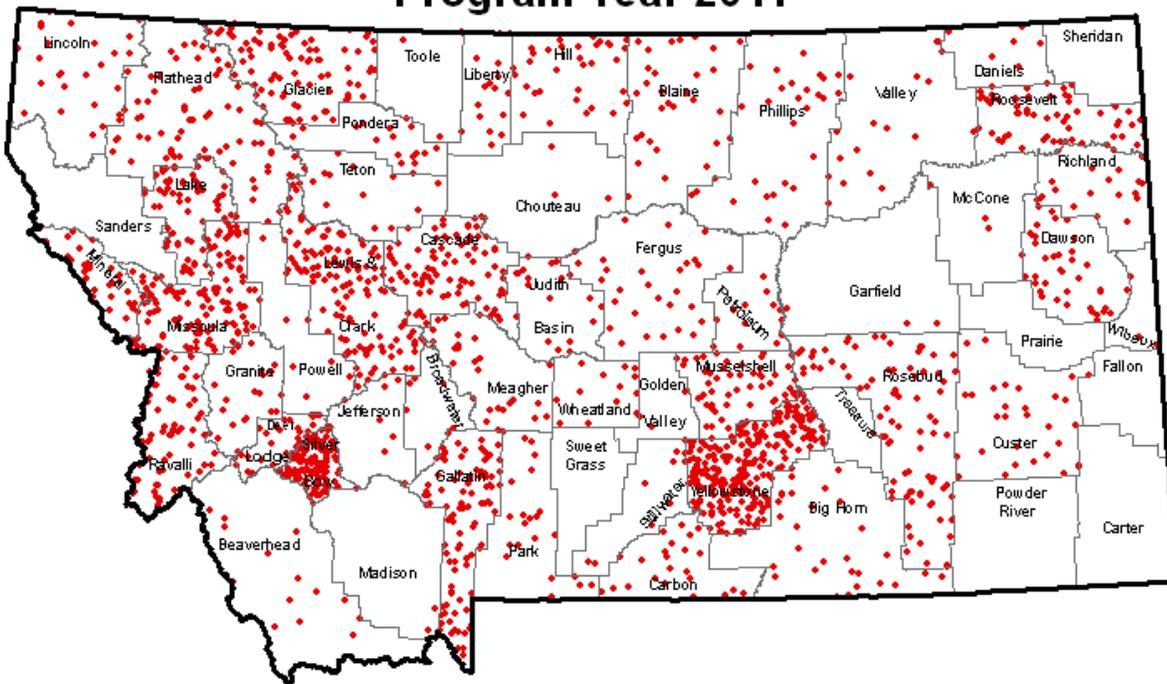
WIA Dislocated Worker services were provided to participants in 18 of 56 counties. No Dislocated Worker services were provided to Blaine, Carter, Daniels, Fallon, Golden Valley, Judith Basin, Liberty, McCone, Musselshell, Petroleum, Pondera, Powder River, Roosevelt, Rosebud, Sheridan, Toole, Treasure, and Wibaux counties. These counties are very rural and do not have a large population base. Nine of the counties had unemployment rates below 5.0% for July 2011-June 2012; seven were between 5.0% and the state's 12-month average unemployment rate of 7.1%; two were above the state's 12-month average rate. The 12-month average unemployment rates for these counties that correlate to PY 2011 are as follows:

| Area | Unemployment Rate | Area | Unemployment Rate |
|----------------------|-------------------|---------------------|-------------------|
| MONTANA | 7.1 | MONTANA | 7.1 |
| BLAINE COUNTY | 6.1 | PETROLEUM COUNTY | 6.2 |
| CARTER COUNTY | 3.2 | PONDERA COUNTY | 6.3 |
| DANIELS COUNTY | 3.9 | POWDER RIVER COUNTY | 4.8 |
| FALLON COUNTY | 2.2 | ROOSEVELT COUNTY | 7.7 |
| GOLDEN VALLEY COUNTY | 3.9 | ROSEBUD COUNTY | 7.3 |
| JUDITH BASIN COUNTY | 5.0 | SHERIDAN COUNTY | 3.2 |
| LIBERTY COUNTY | 5.3 | TOOLE COUNTY | 4.7 |
| MCCONE COUNTY | 3.2 | TREASURE COUNTY | 5.0 |
| MUSSELSHELL COUNTY | 6.0 | WIBAUX COUNTY | 3.4 |

Most WIA Dislocated Worker participants were concentrated in Montana's urban counties, with much smaller numbers of participants in rural counties. The majority were in the western counties, which have had many large layoffs related to the declining timber and manufacturing industries. The 12-month average unemployment rates for July 2011-June 2012 for the following counties are higher than the state's average unemployment rate:

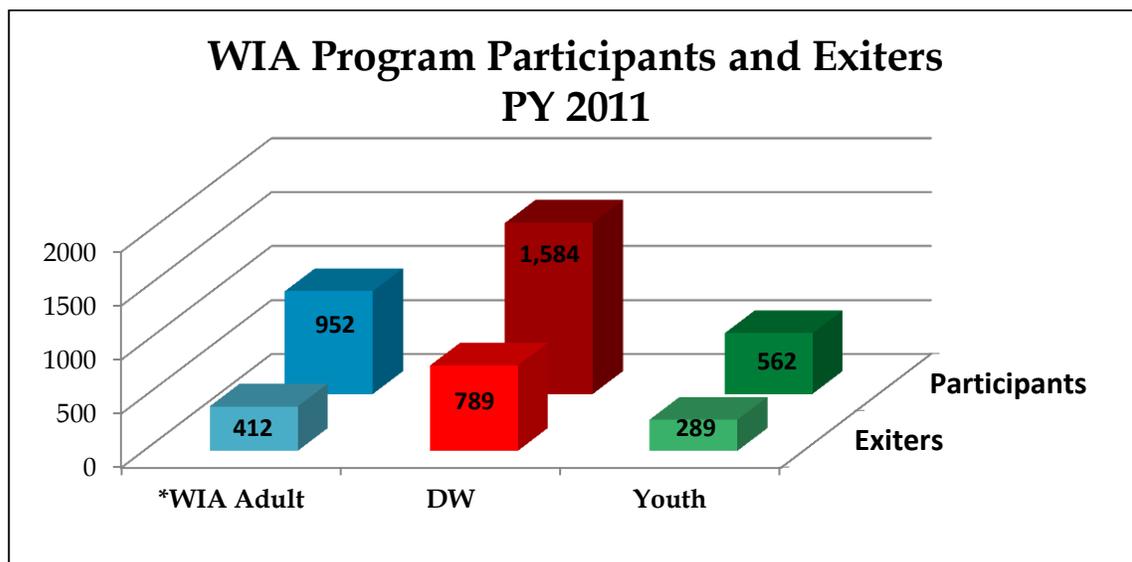
| Area | Unemployment Rate | Area | Unemployment Rate |
|-----------------|-------------------|-------------------|-------------------|
| MONTANA | 7.1 | MONTANA | 7.1 |
| LINCOLN COUNTY | 14.7 | RAVALLI COUNTY | 8.8 |
| SANDERS COUNTY | 14.5 | POWELL COUNTY | 8.2 |
| BIG HORN COUNTY | 13.1 | BROADWATER COUNTY | 8.1 |
| GLACIER COUNTY | 11.6 | ROOSEVELT COUNTY | 7.7 |
| MINERAL COUNTY | 10.4 | DEER LODGE COUNTY | 7.7 |
| GRANITE COUNTY | 10.3 | ROSEBUD COUNTY | 7.3 |
| FLATHEAD COUNTY | 9.9 | MEAGHER COUNTY | 7.3 |
| LAKE COUNTY | 9.6 | | |

WIA Youth Participants Program Year 2011

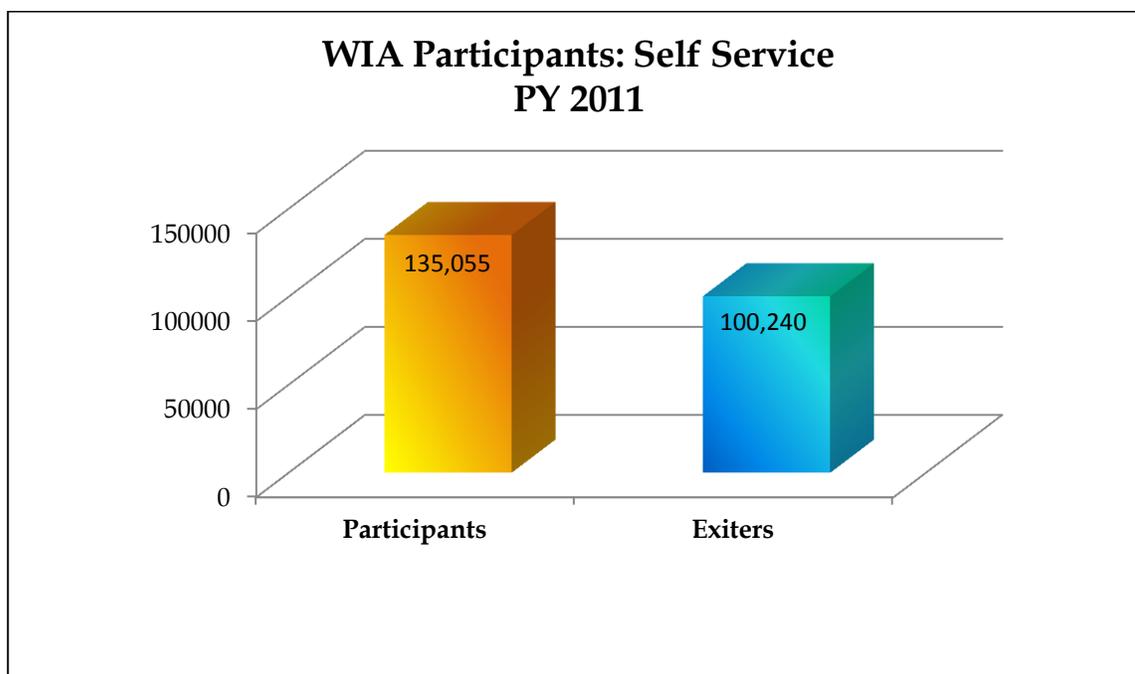


The largest numbers of WIA Youth participants are also concentrated in Montana's urban counties, but Youth service providers served youth participants in most counties. No Youth participants were served in Carter, Fallon, Garfield, Powder River, Prairie, Sanders, Sheridan, Sweet Grass, or Wibaux counties. These counties are very rural and do not have a large population base. One service provider provides outreach services to 17 of the far-eastern counties.

Montana served 3,098 total WIA participants during PY 2011. Many of them remain as active participants because they receive continuing services from Labor Exchange (Job Service).

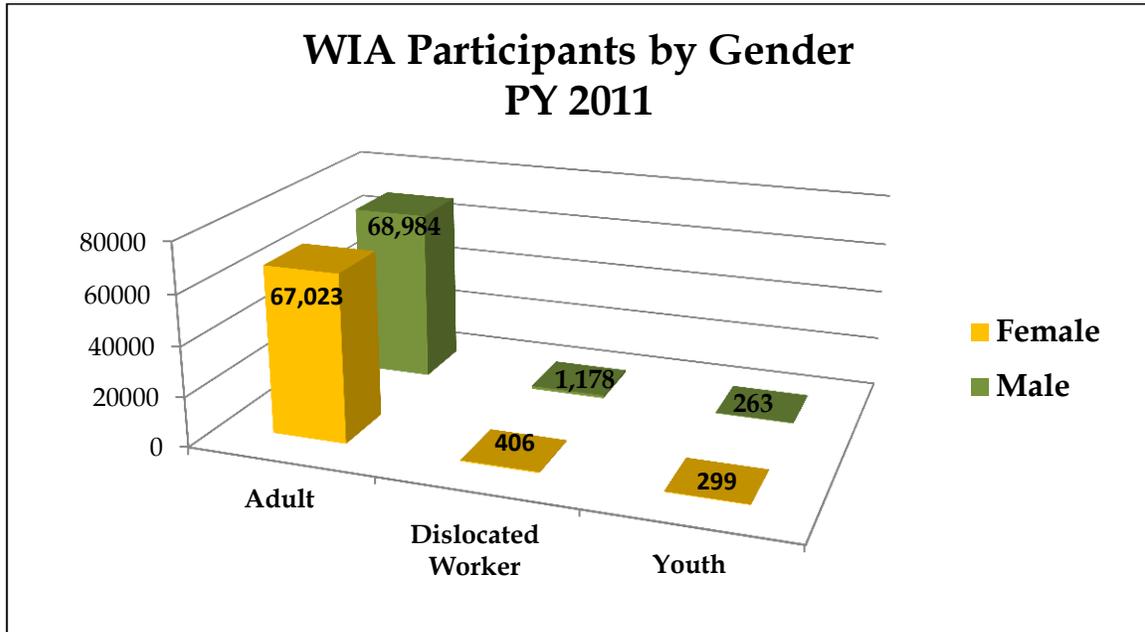


Montana served a significant number of Adult participants who received self-service activities in PY 2011. Self-service activities are those core services made available and accessible to the general public. These services do not require significant staff involvement with the individual in terms of resources or time.

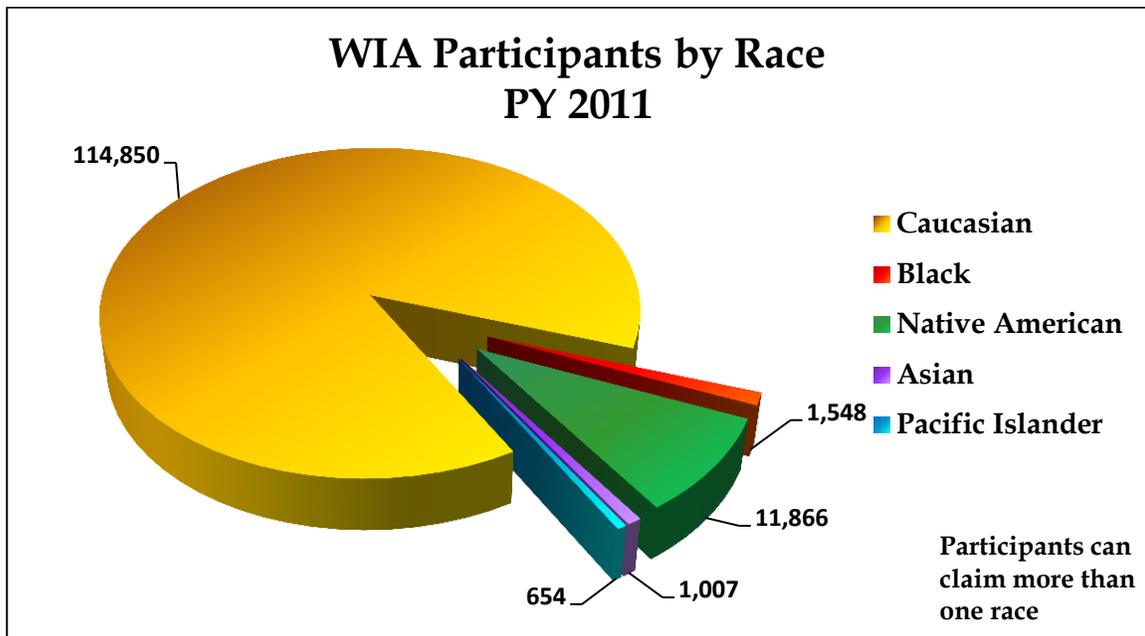


Participant Demographics

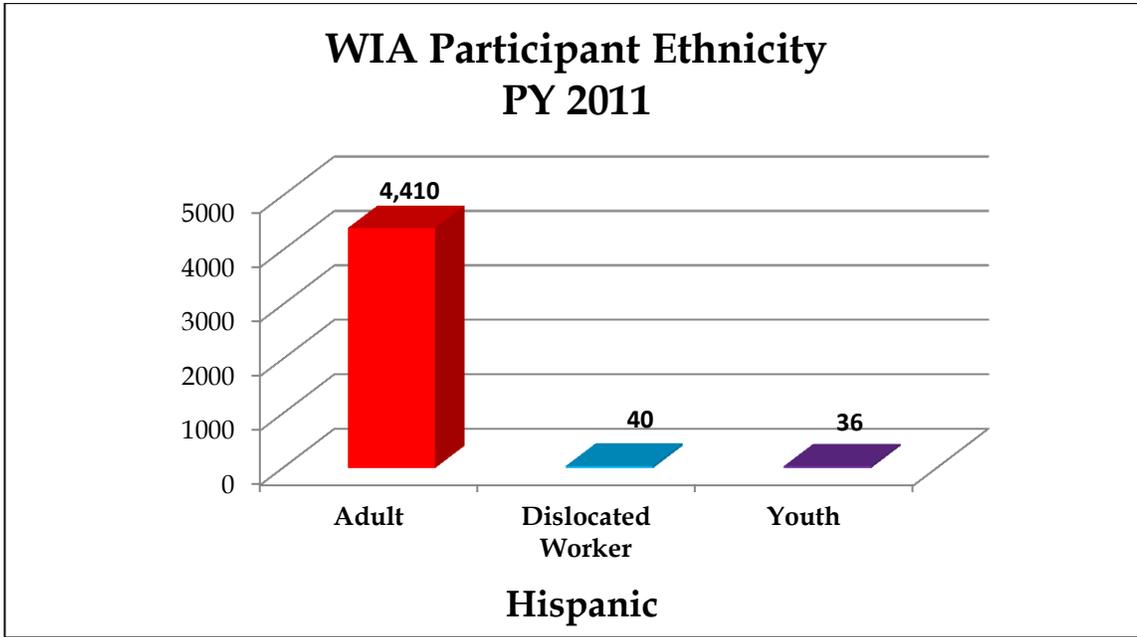
There were 67,023 females and 68,984 males enrolled in WIA programs during the program year. Approximately 74% of Dislocated Worker participants were male.



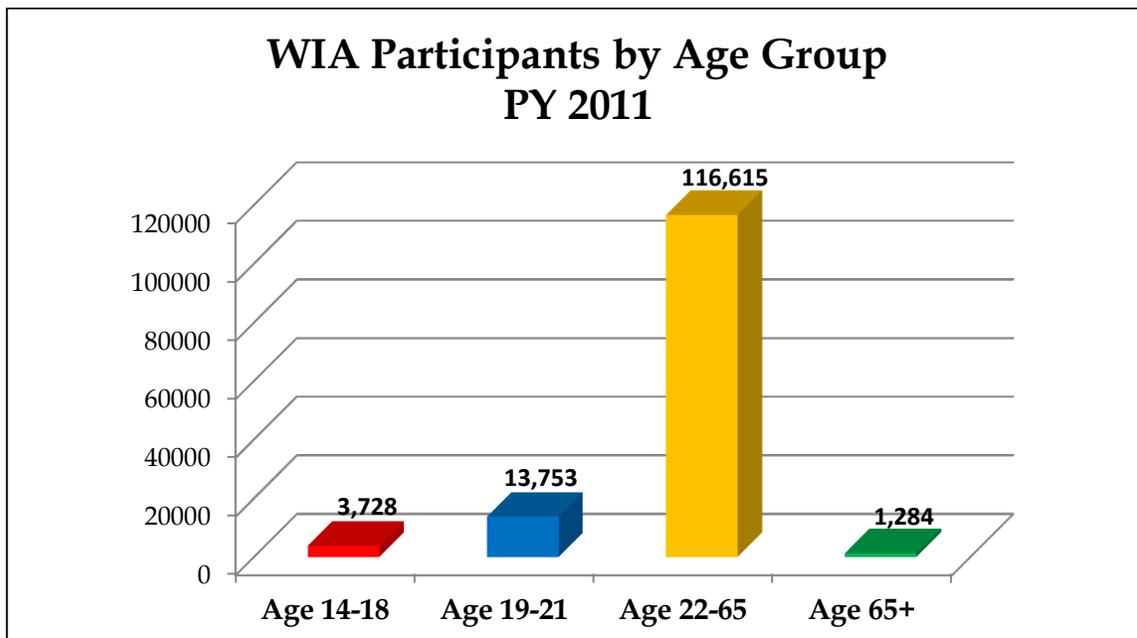
Participants can state that they are one or more race. They can also decline to provide the information.



The majority of Montana’s Hispanic participants identified themselves through self-service functions. Participants can decline to provide ethnicity information.

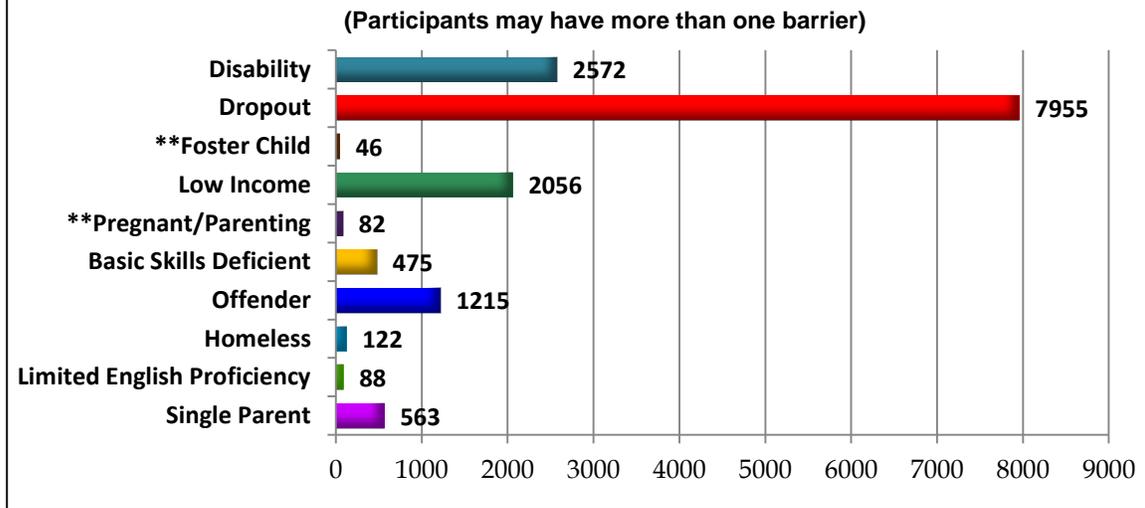


A total of 562 participants were served in the WIA Youth Program. The Youth Program serves participants age 14-21. The rest of the participants shown in the following graph were served by WIA Adult or WIA Dislocated Worker programs. The Adult and Dislocated Worker programs serve participants age 18 and over. Participants may be served by more than one program. Older Youth participants may also be served by Adult or Dislocated Worker programs.



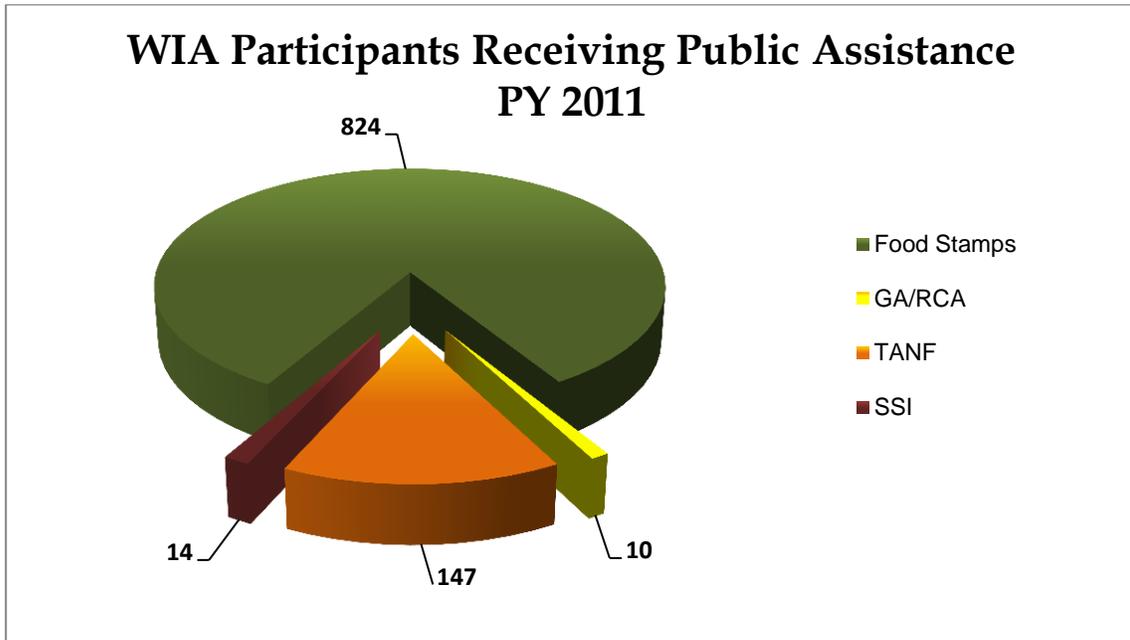
Many WIA participants have one or more barriers to securing employment.

WIA Participants: Barriers to Employment PY 2011



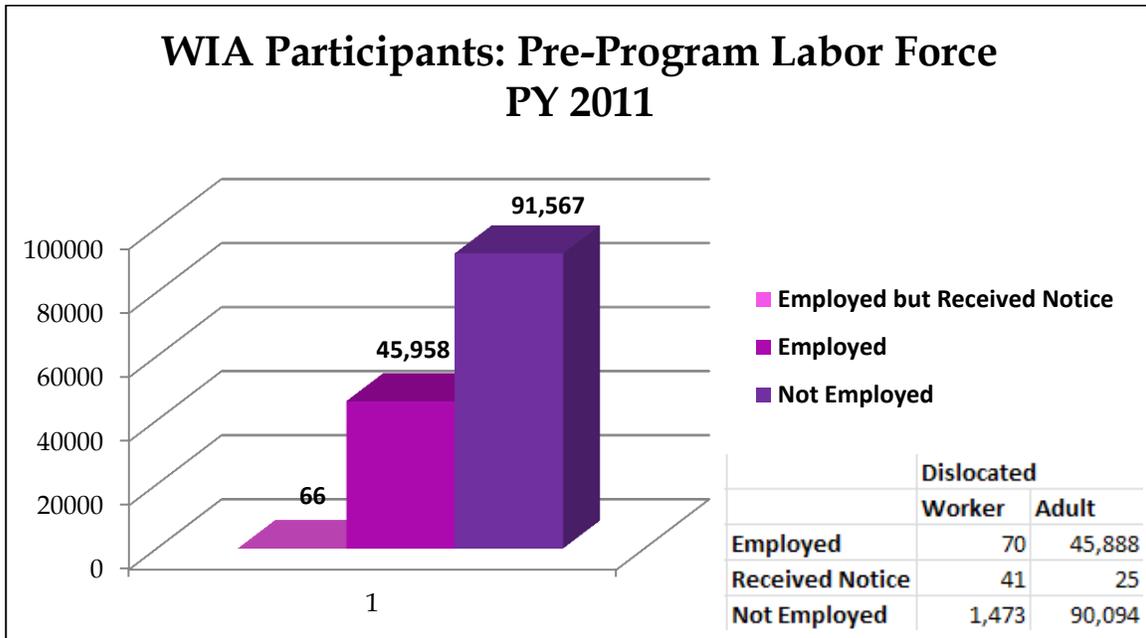
Food Stamps and TANF were the most common sources of public assistance for WIA participants in PY 2011. Other types of assistance included General Assistance, Social Security Income, Social Security Disability Income, and Refugee Assistance.

WIA Participants Receiving Public Assistance PY 2011

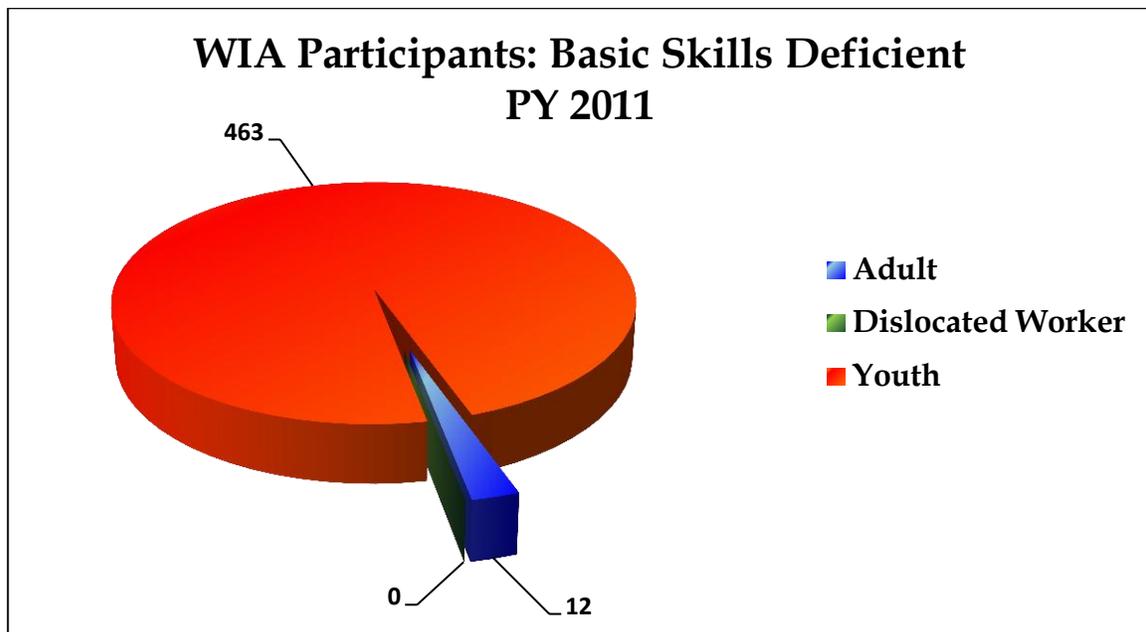


To be included in the Entered Employment performance measure, participants cannot be employed at participation. This performance measure only applies to Adult participants (includes Adult and Dislocated

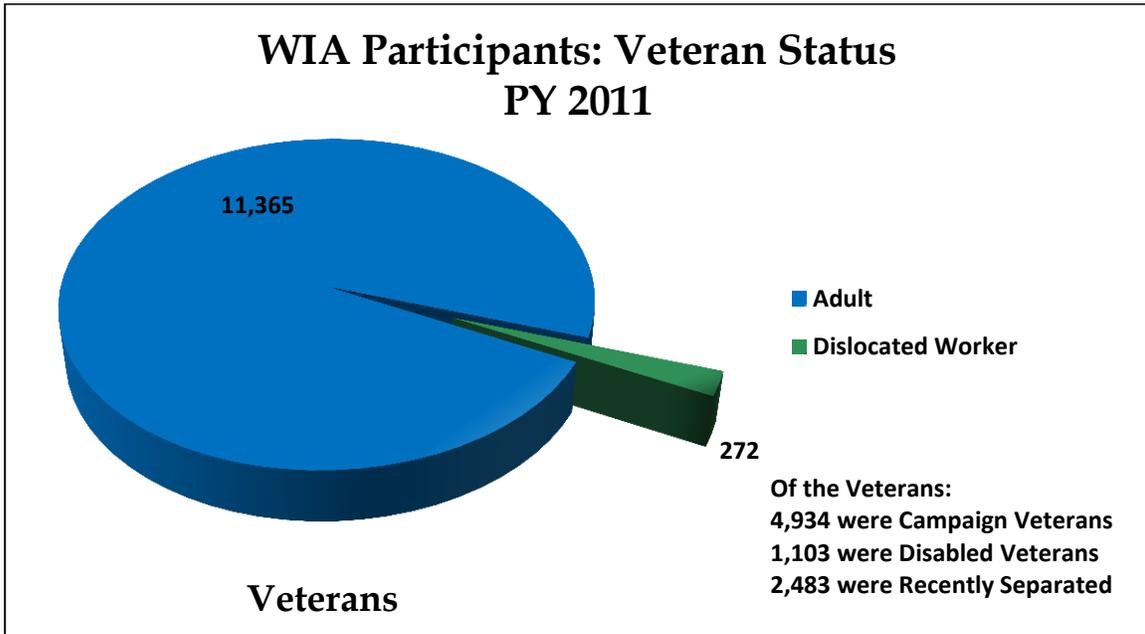
Worker participants). There were 91,567 participants who were considered not employed at participation during PY 2011. Those who were employed but received notice of termination are considered not employed.



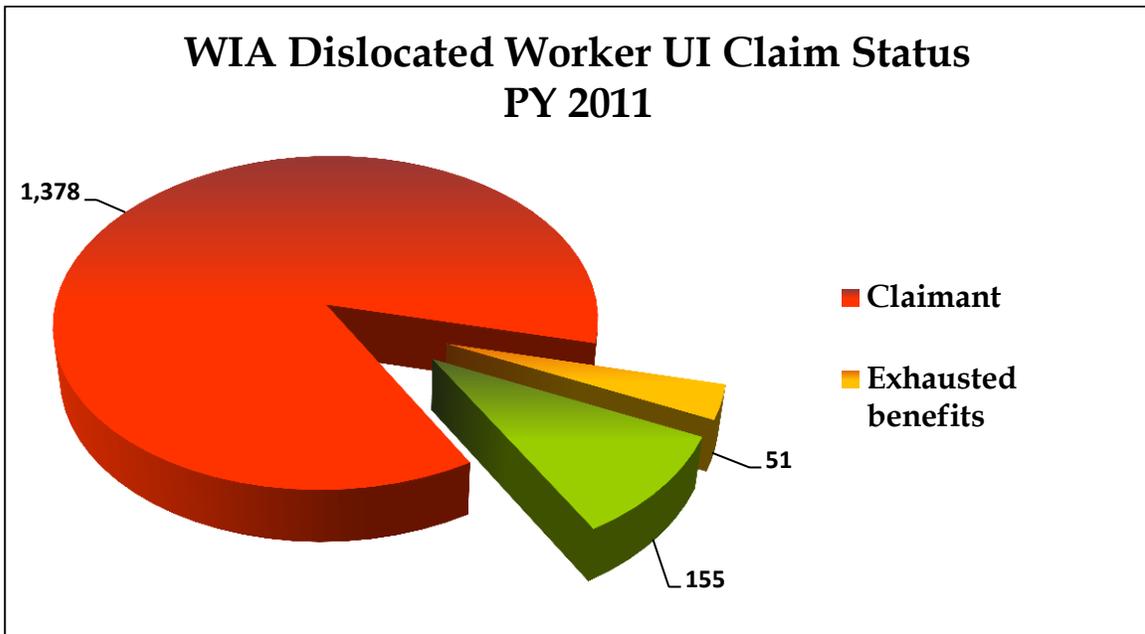
A total of 475 WIA participants were found to be basic skills deficient. These participants had either math or reading skills below the 9th grade level. The majority of basic skills deficient participants were in the Youth program.



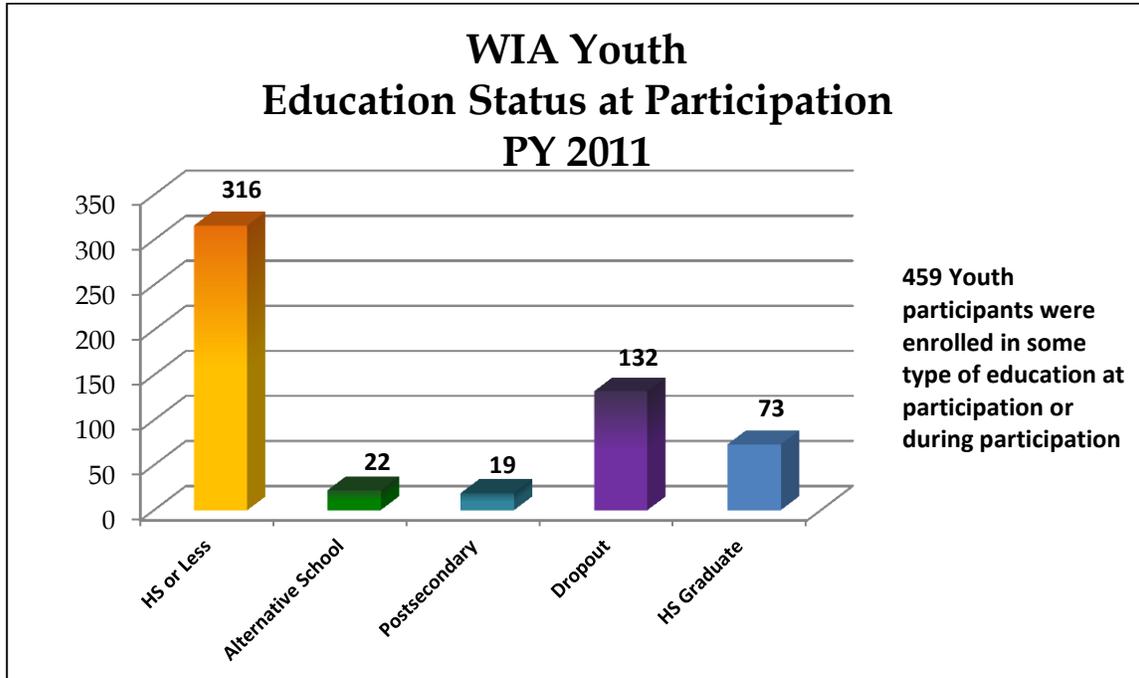
A total of 11,637 participants claimed Veteran status during PY 2011.



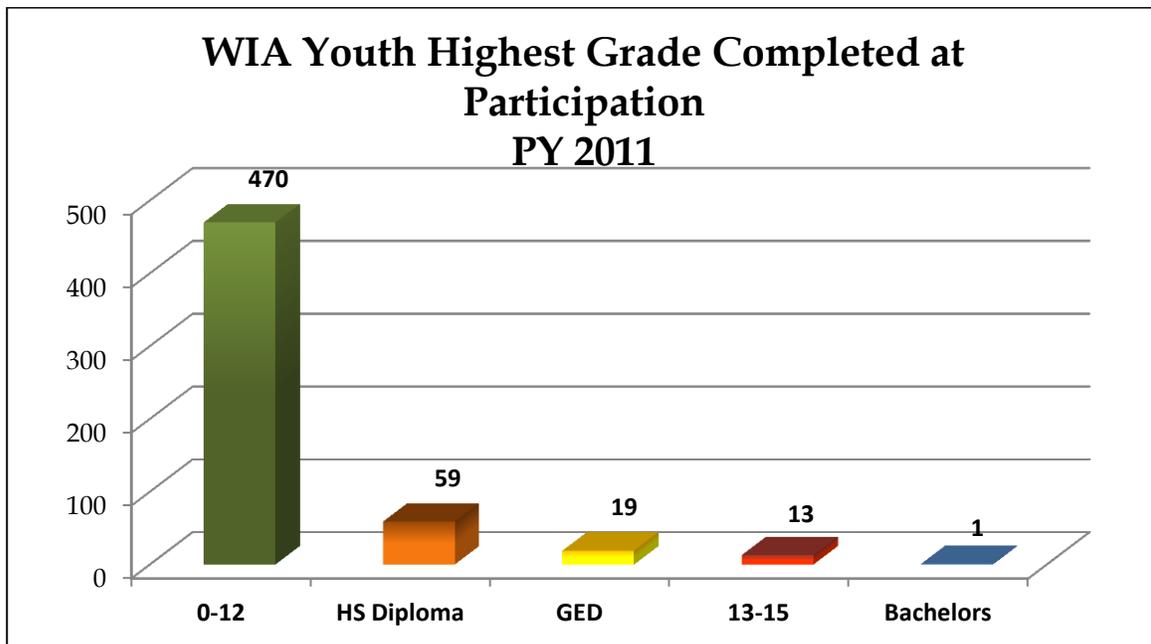
The majority of Montana's Dislocated Worker participants were identified or referred through Rapid Response but were receiving UI when enrolled.



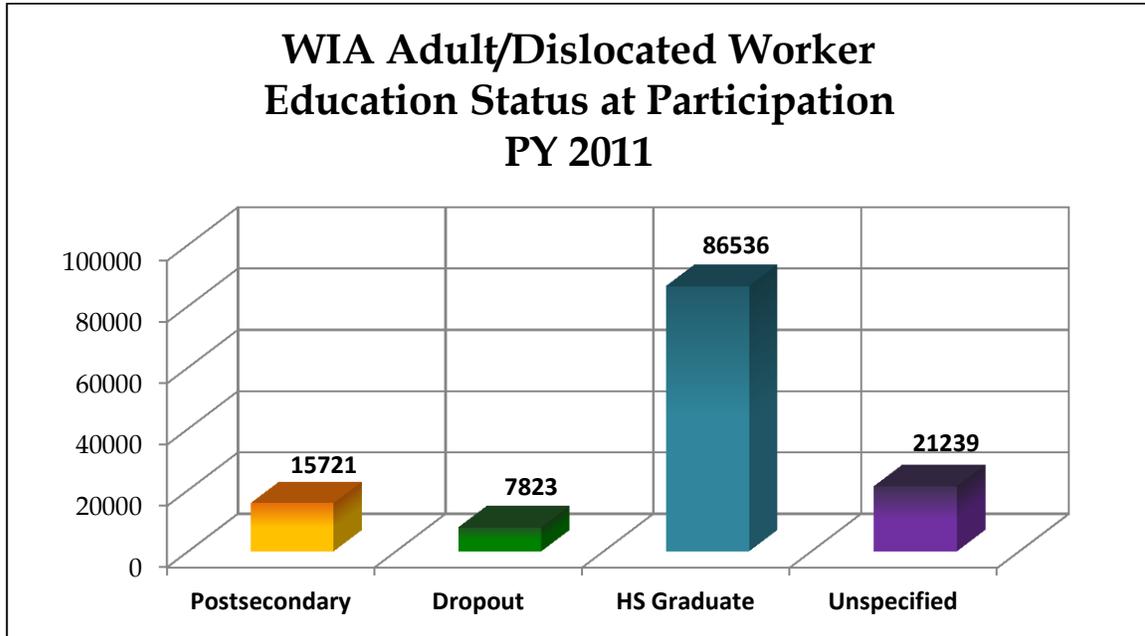
As expected, the majority of Montana’s WIA youth participants were in high school or less at participation. There were 459 youth participants enrolled in some type of education either at or during their participation.



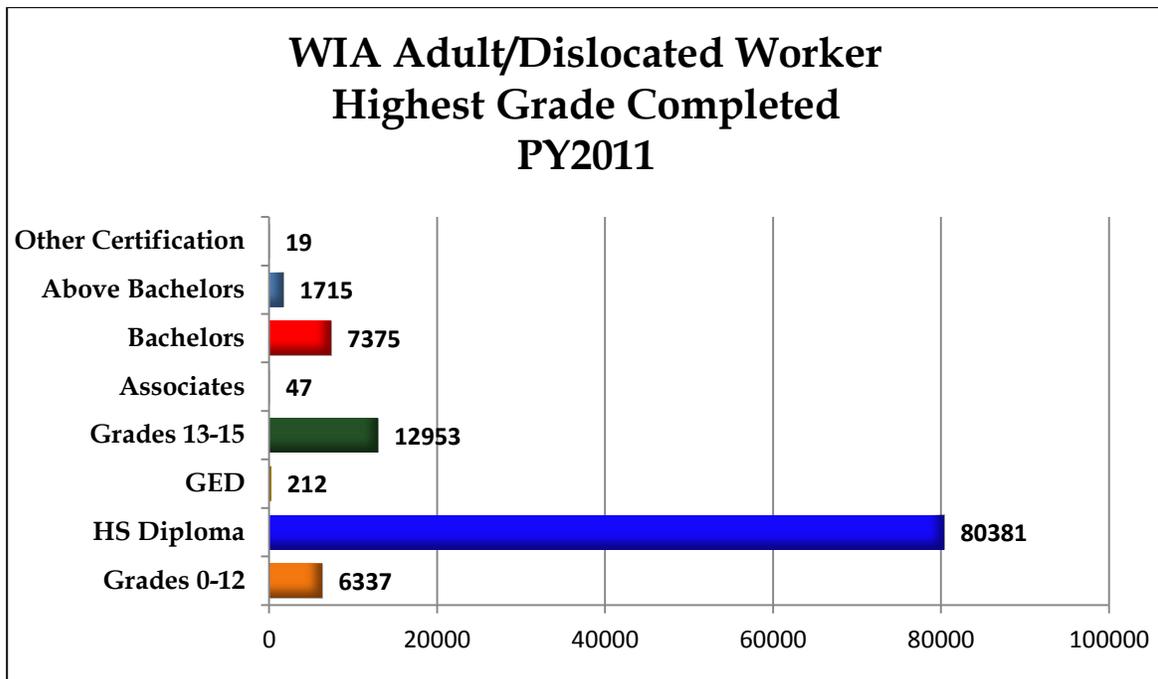
The majority of youth participants had not completed schooling above the 12th grade level.



Most Adult and Dislocated Worker participants had completed high school at participation. Approximately 14% were enrolled in postsecondary education at participation.



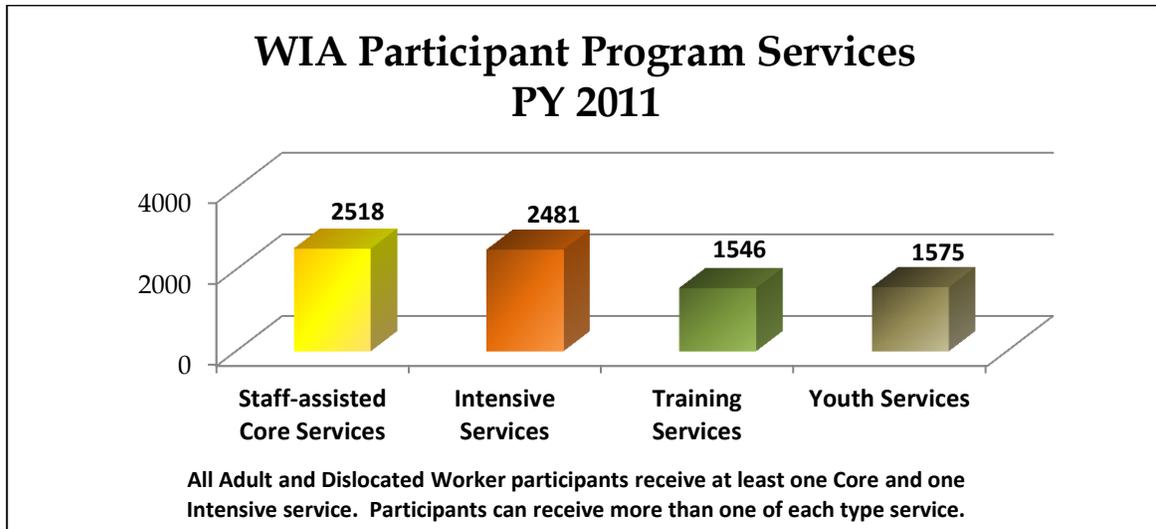
Coinciding with current education status, the vast majority of Adult and Dislocated Workers had attained a high school diploma or GED by participation.



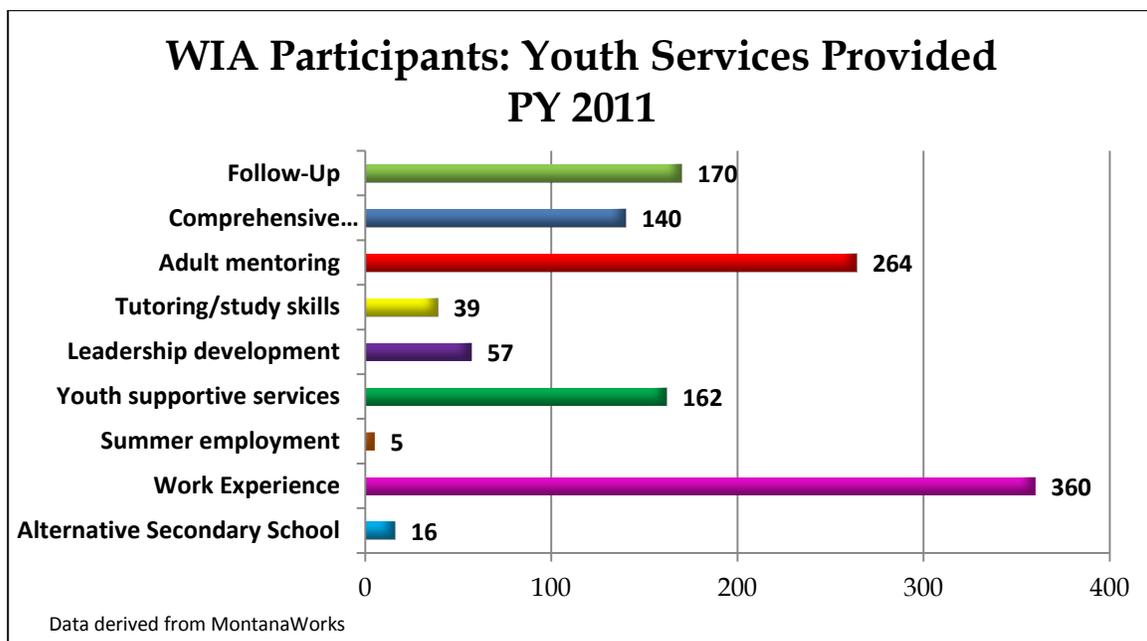
WIA Participation

WIA participants receive services according to their individual needs:

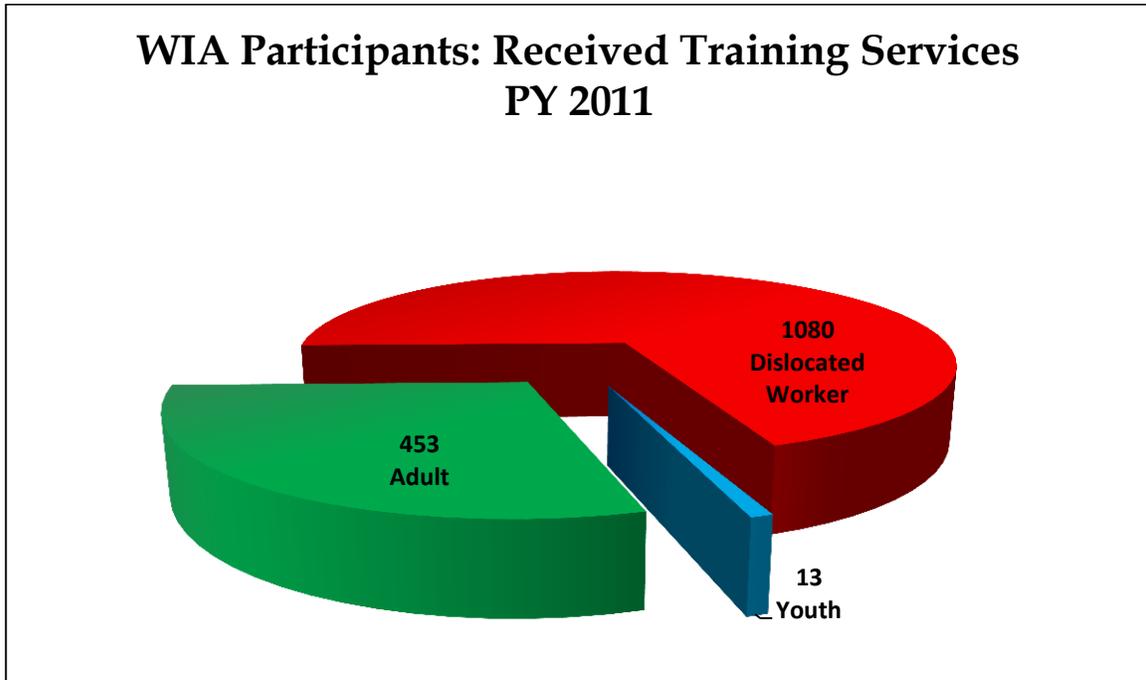
- Core services are universally available to everyone entering a WIA facility and are the first services provided.
- Intensive services are provided to adults and dislocated workers who are not able to obtain employment or who remain underemployed after utilizing core services. An individual must have received at least one core service such as an initial assessment that determines that individual's need for these services.
- Training services are provided to those participants who have not achieved self-sufficient employment using core and intensive services.
- Youth Services are a grouping of 10 required components that are available to Youth participants.



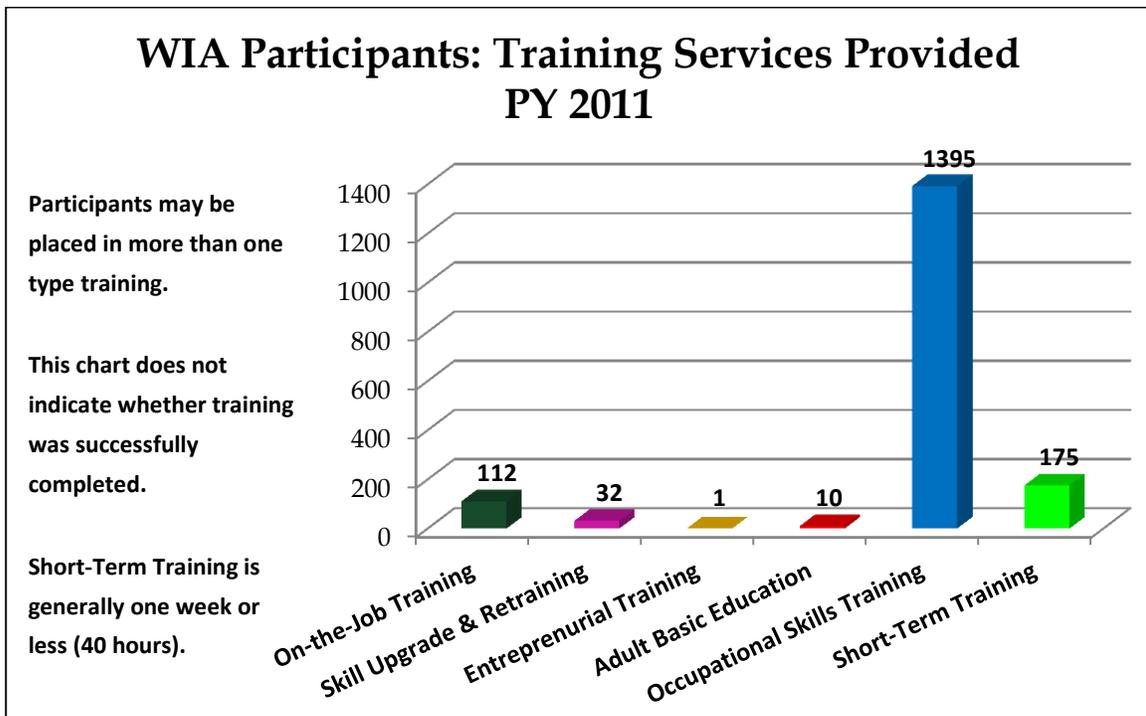
Youth participants may be placed in more than one required Youth component.



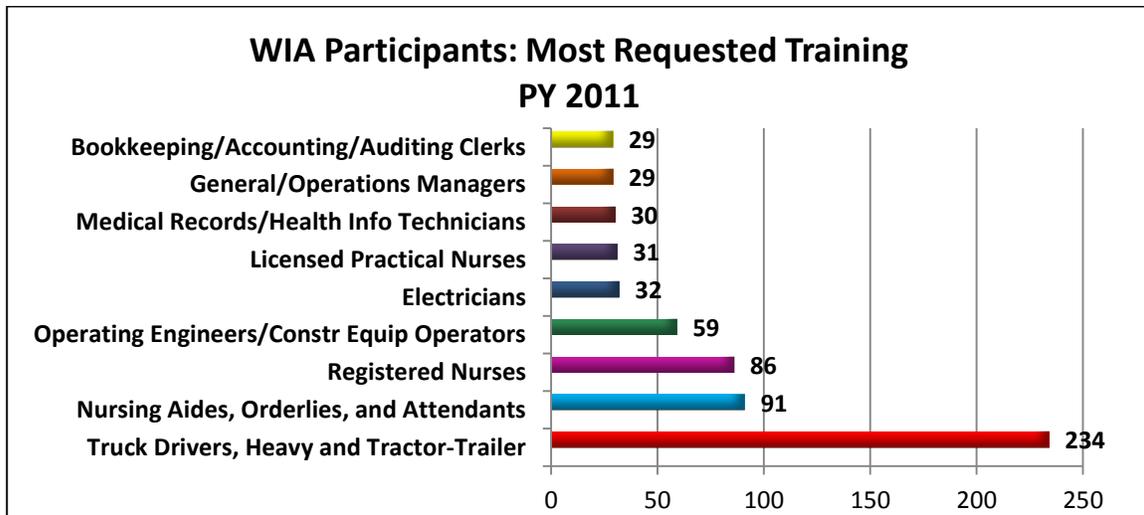
A total of 1,546 participants received training services during PY 2011.



There are seven types of training services available to Montana’s participants. They may be provided more than one type of training. The majority of training services provided during PY 2011 were in Occupational Skills Training.



The most requested type of training during PY 2011 was for Truck Driver training, followed by Nursing Aide, Orderly, and Attendant training.



Participants were placed in a variety of occupational training programs.

**Number of WIA Participants Attending
Occupational Training Programs
Montana PY 2011**

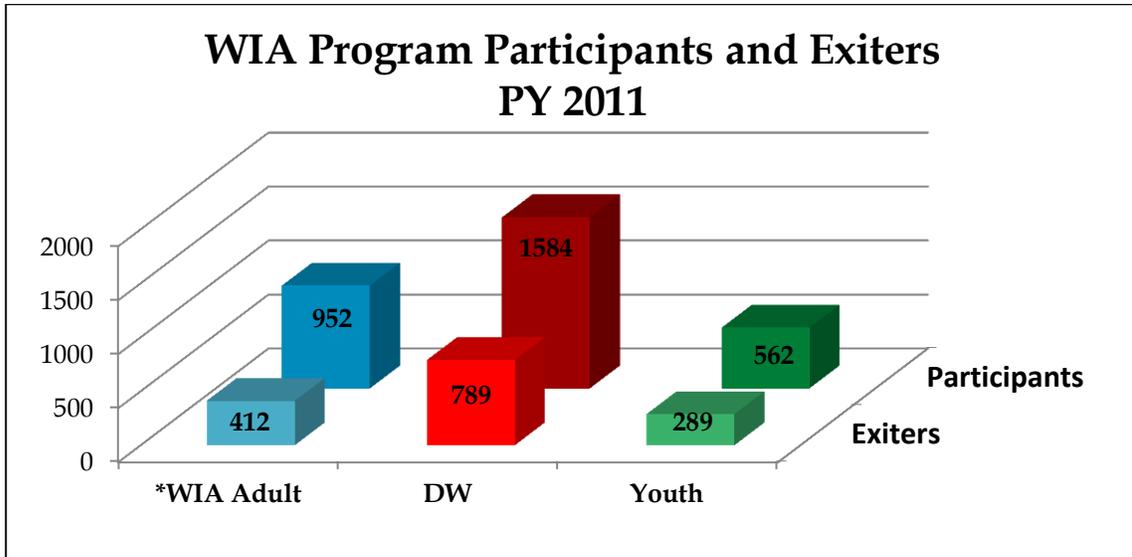
| <u>Occupational Training Title</u> | <u># Participants</u> |
|--|---------------------------|
| Management | 71 |
| Business & Financial Operations | 37 |
| Computer & Mathematical | 47 |
| Architecture & Engineering | 69 |
| Life, Physical, & Social Science | 43 |
| Community & Social Services | 40 |
| Legal | 11 |
| Education, Training & Library | 33 |
| Arts, Design, Entertainment, Sports, Media | 8 |
| Healthcare Practitioner & Technical | 226 |
| Healthcare Support | 135 |
| Protective Service | 11 |
| Food Preparation & Serving Related | 10 |
| Building & Grounds Cleaning & Maintenance | 4 |
| Personal Care & Service | 21 |
| Sales & Related | 22 |
| Office & Administrative Support | 79 |
| Farming, Fishing, & Forestry | 10 |
| Construction & Extraction | 159 |
| Installation, Maintenance, & Repair | 109 |
| Production | 115 |
| Transportation & Material Moving | 266 |

Exits/Program Outcomes

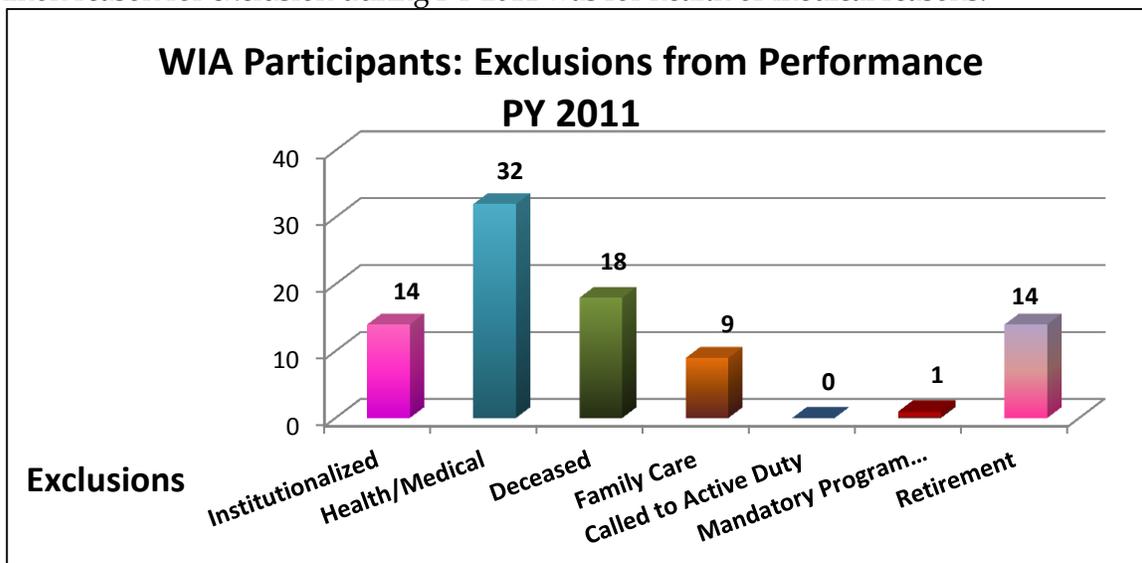
During PY 2011, 101,318 participants exited from WIA programs.

Common Exit affects the number of total exiters reported to the Employment and Training Administration.

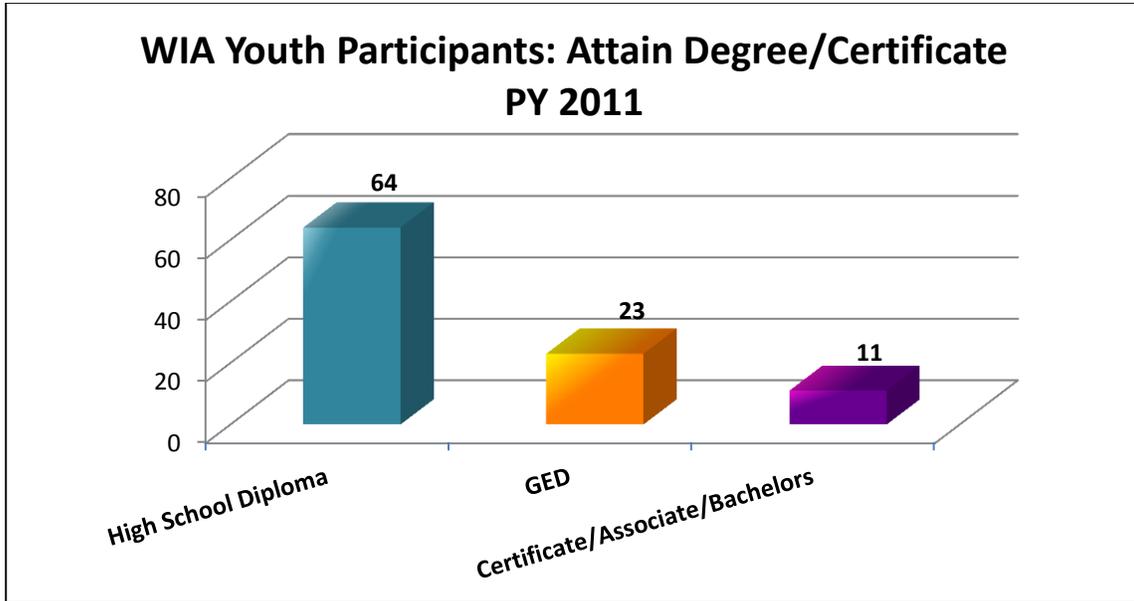
- Common exit means participants are not considered exited until they are totally done with Labor Exchange (Job Service), Trade programs, and WIA programs.
- To be counted as an exiter, the participant has to receive no countable services in these programs for 90 days.



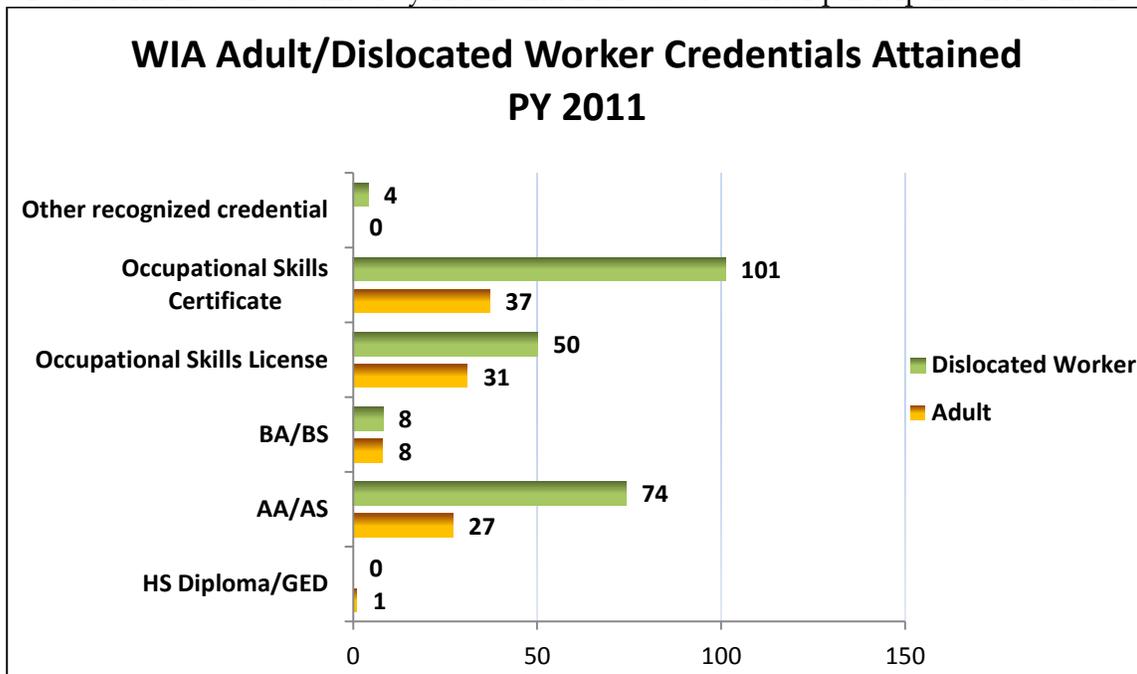
WIA participants that cannot continue their program participation are excluded from performance. The most common reason for exclusion during PY 2011 was for health or medical reasons.



Youth participants who were enrolled in education at participation or during their participation are included in calculation of the Attain Degree/Certificate performance measure. Of the Youth participants included in this measure, a total of 98 achieved a diploma or certificate during PY 2011. This number is fairly low because of Common Exit. Participants continue to remain active even though they have completed their WIA enrollment. The majority maintain their Labor Exchange (Job Service) enrollment by job searching, either to find employment or to improve their current employment situation. This delays reporting for the performance measure.

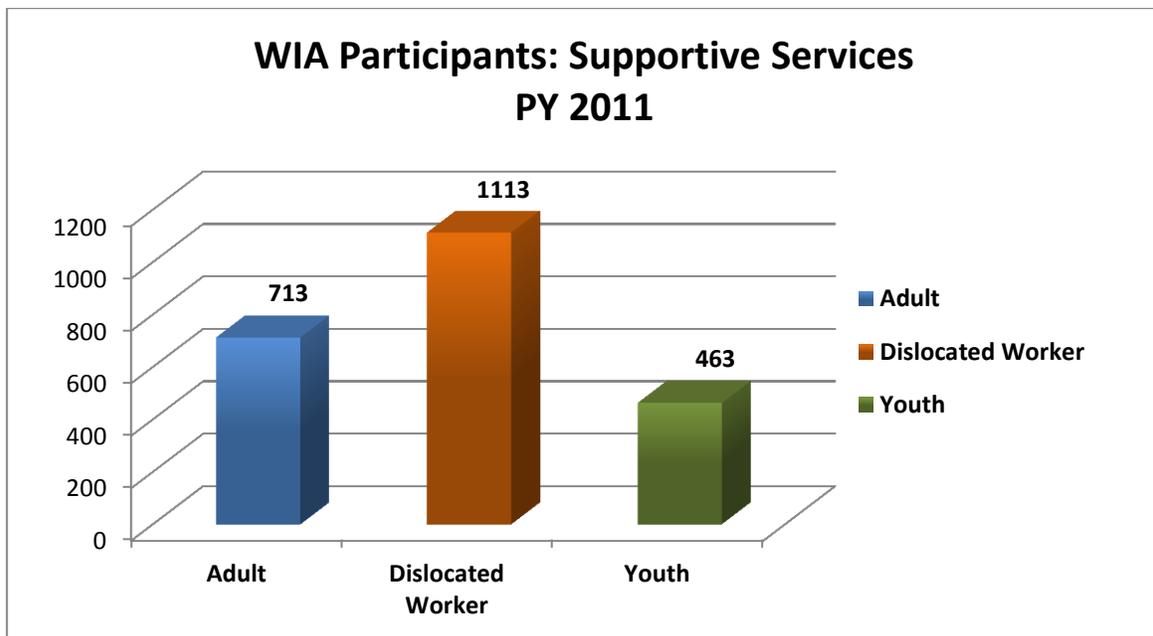


A total of 340 credentials were attained by Adult and Dislocated Worker participants in PY 2011.

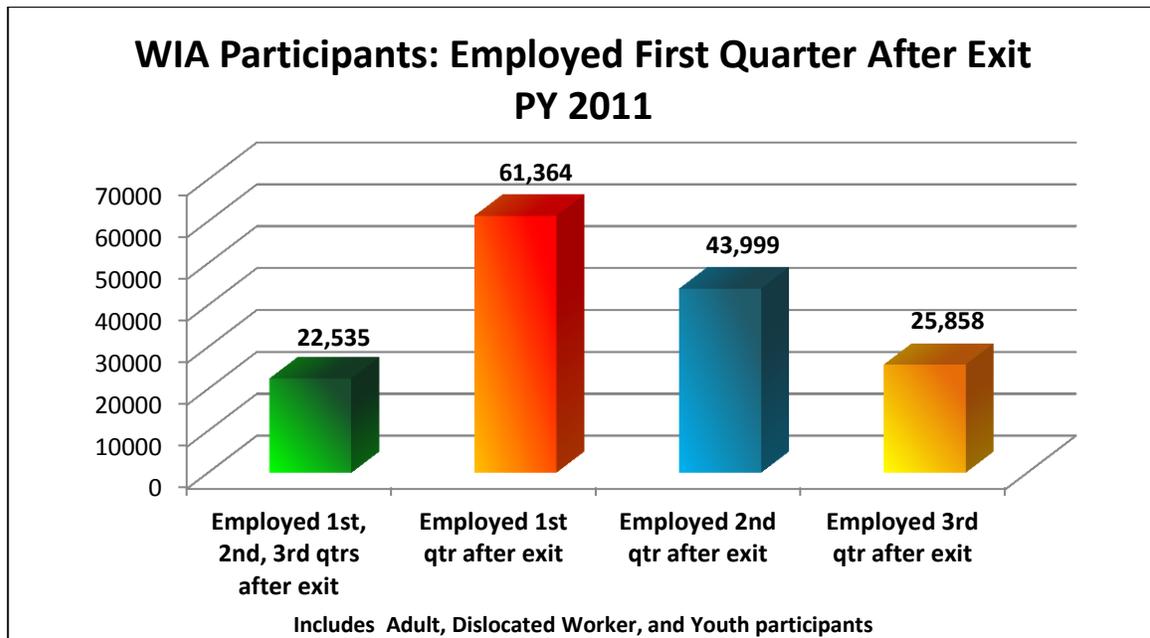


Supportive Services - The intent of WIA is to assist individuals to overcome barriers to employment. WIA participants are given necessary supportive services to support completion of their Individual Service Strategy or Individual Employment plan. The receipt of intensive and training services alone may not address other issues that can make the road to self-sufficiency difficult. The judicious use of supportive service assistance is an integral component of a comprehensive plan of service. Supportive services provided to Montana’s WIA participants in PY2011 included the following:

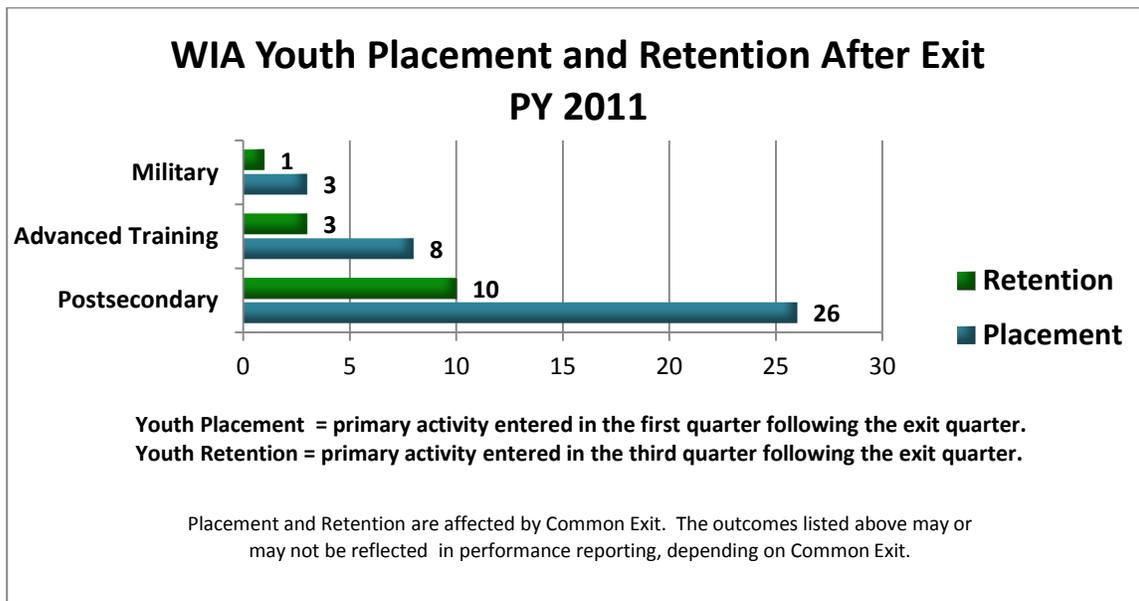
- Youth Supportive Services
 - Transportation assistance
 - Healthcare services
 - Child care assistance
 - Training-related clothing
 - Lodging assistance
- Adult and Dislocated Worker Supportive Services
 - Transportation assistance
 - Healthcare services
 - Child care assistance
 - Training-related clothing
 - Lodging assistance
 - Job search allowance
 - Relocation assistance



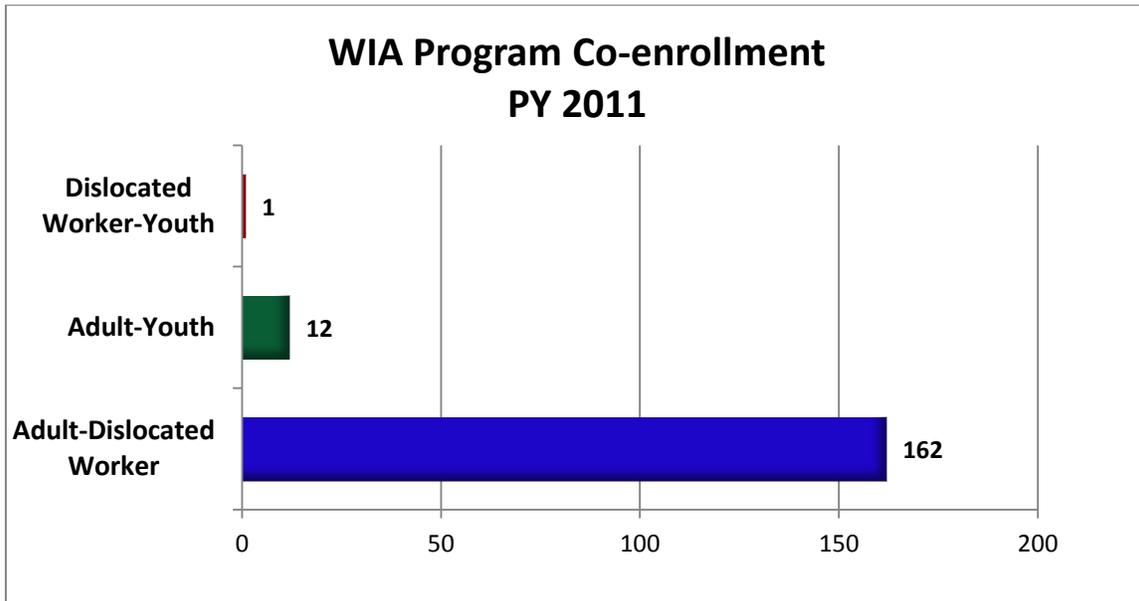
A total of 61,364 participants were employed during the first quarter after exiting from WIA programs during PY 2011. There were 22,535 participants who were employed first, second, and third quarters after exit. These numbers do not equate to the performance requirements set for WIA Common Measures.



Placement and Retention rates for WIA Youth are affected by Common Exit. The outcomes for placement and retention may not be reflected in performance reporting. This could occur because participants remain active in Labor Exchange, searching online for a job, or checking in with the Job Service offices to look for other employment opportunities. Very few participants were shown as being placed or retaining placement in postsecondary training, advanced training, or military employment. No Youth participants were placed in an approved apprenticeship for PY 2011.



Montana's funding and case management resources are limited, so co-enrollment in other programs is recommended when possible. This coordination can be provided by an individual service provider that operates more than one WIA program, or two service providers can provide services as needed and as funding allows.



SHARING CUSTOMER SATISFACTION AND SUCCESSES

❖ CUSTOMER SATISFACTION

Although Montana (through the waiver request) is required to report only on Common Measures for all WIA Title I-B the Montana Department of Labor and Industry puts high value on customer satisfaction and continues to internally track customer satisfaction using the current performance measures of a minimum response rate of 70% which was required for both exited participants under the 17 WIA Performance Measures. The Statewide Programs and Oversight Bureau staff continues to compile customer satisfaction results on an annual basis in order to allow the State Workforce Investment Board to gauge the State's progress toward "continuously improving in performance.

The State conducts a 100% sample of all exiters that did not fall under exclusions, from WIA Title IB programs for the customer satisfaction survey. Customer satisfaction survey responses are collected by telephone interviews. In-person interviews and mail questionnaires are used only in situations where the individual does not have a telephone or where the person has a hearing impairment. Participants are contacted as soon as possible after the date of exit and no later than 60 days after the date of exit.

Participants are asked a series of three questions regarding their experience with the WIA program. They are asked to score the three questions using a scale of 1-10 for the following areas:

- ✓ Overall satisfaction with the services provided
- ✓ To what extent services met expectations
- ✓ How services received compare to ideal services

❖ WHAT CUSTOMERS ARE SAYING ABOUT THE PROGRAMS

- **Belgrade Career Transitions** - Participant wanted it noted that the Case Managers went above and beyond what she expected. She was able to obtain her 1 class to get her degree. The kindness and the care that was provided enabled her to get her degree. Excellent! Another customer said they researched everything for her and were very thorough.
- **Butte Office** - the participant said this office was wonderful, amazing.
- **Helena CTI** - The Treatment & guidance I received was more than ideal.
- **Kalispell Office/Flathead Job Service**- The Treatment & guidance I received was more than ideal. Jori Bullemer is excellent. She did an orientation for about 300 people and was excellent. Another customer was very pleased with the help he received and the classes Heavy equipment, CDL, had a concern about the policy change where this participate was not able to keep tools. This person actually did the appeal system. Even though not able to keep tools. Very satisfied with the program.
- **Bozeman Office** -Would have liked to have more counseling and mentoring. I would have liked to have known about the class sooner so I could have prepared better.
- **Billings HRDCI** would like to note that Cory Persinski and Carleen Goodheart are excellent for the program. They are very professional, polite and helpful.
- **Polson Office** -Paula Aznoe was very helpful.
- **Career Futures** - Lynn was very helpful.

PROGRAM YEAR 2011 PERFORMANCE

The U.S. Department of Labor-Employment and Training Administration negotiates performance levels with each state by program year. Montana met performance at the 80% level for six performance measures and exceeded rates for three measures: Adult Average Earnings, Dislocated Worker Average Earnings, and Youth Literacy and Numeracy Gains.

| Performance Items/Programs | Negotiated Performance | Actual Performance | Numerator | Denominator |
|---|------------------------|--------------------|--------------|-------------|
| Entered Employment Rate | | | | |
| a) Adults | 81.0 | *74.4 | 334 | 449 |
| b) Dislocated Workers | 88.0 | *74.1 | 658 | 888 |
| Retention Rate (6 months) | | | | |
| a) Adults | 83.0 | *85.5 | 553 | 647 |
| b) Dislocated Workers | 92.0 | *88.0 | 564 | 641 |
| Average Earnings | | | | |
| a) Adults | \$11,700 | \$15,455 | \$8,098,335 | 524 |
| b) Dislocated Workers | \$14,600 | \$20,438 | \$10,709,701 | 524 |
| Placement in Employment or Education | 80.0 | *67.1 | 202 | 301 |
| Attainment of Degree or Certificate | 71.0 | *60.7 | 159 | 262 |
| Literacy or Numeracy Gains | 22.0 | 43.3 | 29 | 67 |

Blue = Met Performance Levels

Green = Exceeded Performance Levels

* Met 80% of Negotiated Performance Level

NOTE: The Employment and Training Administration (ETA) negotiates performance at certain levels for each performance measure. States can pass performance by meeting 80% of the negotiated values for each measure.

PROGRAM PERFORMANCE DATA

**Performance Levels
July 1, 2011 through June 30, 2012**

| PERFORMANCE MEASURES | PERFORMANCE GOALS |
|--|-------------------------------|
| | PY 2011 (07/01/11-6/30/12) |
| Adult Program - Common Measures Indicators of Performance | |
| 1. Entered Employment Rate | 81.0% |
| 2. Employment Retention Rate | 88.0% |
| 3. Six Months Average Earnings | \$11,700 |
| Dislocated Worker Program - Common Measures Indicators of Performance | |
| 1. Entered Employment Rate | 83.0% |
| 2. Employment Retention Rate | 92.0% |
| 3. Six Months Average Earnings | \$14,600 |
| Youth Program - Common Measures Indicators of Performance | |
| 1. Placement in Employment or Education | 80.0% |
| 2. Attainment of Degree or Certificate | 71.0% |
| 3. Literacy and Numeracy Gains | 22.0% |

WIA Title IB Annual Report Form (ETA 9091)
Report Period: 07/01/2011 to 06/30/2012

Agy./PO: 00-00 State of Montana (Statewide)

Date Ranges Used In Calculating Report Items

| | |
|---|-------------------------|
| Total Participants: | 07/01/2011 - 06/30/2012 |
| Total Exitors: | 04/01/2011 - 03/31/2012 |
| Entered Employment Rate, Youth Placement in Employment or Education, and Youth Attainment of Degree or Certificate: | 10/01/2010 - 09/30/2011 |
| Employment Retention Rate and Six Months Earnings Change: | 04/01/2010 - 03/31/2011 |
| Youth Literacy and Numeracy Gains: | 07/01/2011 - 06/30/2012 |

Table B - Adult Program Results At-A-Glance

| Performance Item | Negotiated Performance | Actual Performance | Numerator | Denominator |
|-----------------------------|------------------------|--------------------|-------------|-------------|
| Entered Employment Rate | 81.0 | 74.4 | 334 | 449 |
| Employment Retention Rate | 88.0 | 85.5 | 553 | 647 |
| Six Months Average Earnings | \$11,700 | \$15,455 | \$8,098,335 | 524 |

Table C - Outcomes for Adult Special Populations

| Reported Information | Public Assistance | Num Den | Veteran | Num Den | Individuals With Disabilities | Num Den | Older Individuals | Num Den |
|-----------------------------|-------------------|---------------------------|----------|------------------------|-------------------------------|------------------------|-------------------|------------------------|
| Entered Employment Rate | 71.4 | <u>137</u> 192 | 67.6 | <u>23</u> 34 | 53.3 | <u>8</u> 15 | 77.4 | <u>24</u> 31 |
| Employment Retention Rate | 79.7 | <u>157</u> 197 | 78.8 | <u>41</u> 52 | 75.0 | <u>12</u> 16 | 80.0 | <u>40</u> 50 |
| Six Months Average Earnings | \$12,237 | <u>\$1,884,447</u> 154 | \$21,555 | <u>\$840,661</u> 39 | \$11,800 | <u>\$117,998</u> 10 | \$18,069 | <u>\$668,569</u> 37 |

Table D - Other Outcome Information for the Adult Program

| Reported Information | Received Training Services | Num Den | Only Core and/or Intensive Services | Num Den |
|-----------------------------|----------------------------|---------------------------|-------------------------------------|---------------------------|
| Entered Employment Rate | 81.6 | <u>142</u> 174 | 69.8 | <u>192</u> 275 |
| Employment Retention Rate | 87.7 | <u>171</u> 195 | 84.5 | <u>382</u> 452 |
| Six Months Average Earnings | \$14,214 | <u>\$2,288,368</u> 161 | \$16,005 | <u>\$5,809,967</u> 363 |

WIA Title IB Annual Report Form (ETA 9091)

Report Period: 07/01/2011 to 06/30/2012

Agy./PO: 00-00 State of Montana (Statewide)

Table E - Dislocated Worker Program Results At-A-Glance

| Performance Items | Negotiated Performance | Actual Performance | Numerator | Denominator |
|-----------------------------|------------------------|--------------------|--------------|-------------|
| Entered Employment Rate | 83.0 | 74.1 | 658 | 888 |
| Employment Retention Rate | 92.0 | 88.0 | 564 | 641 |
| Six Months Average Earnings | \$14,600 | \$20,438 | \$10,709,701 | 524 |

Table F - Outcomes for Dislocated Worker Special Populations

| Reported Information | Veteran | Num Den | Individuals With Disabilities | Num Den | Older Individuals | Num Den | Displaced Homemaker | Num Den |
|-----------------------------|----------|--------------------------|-------------------------------|------------------------|-------------------|--------------------------|---------------------|------------------|
| Entered Employment Rate | 59.1 | <u>104</u> 176 | 50.0 | <u>14</u> 28 | 49.6 | <u>113</u> 228 | 0 | <u>0</u> 1 |
| Employment Retention Rate | 87.0 | <u>100</u> 115 | 73.7 | <u>14</u> 19 | 89.0 | <u>81</u> 91 | 100.0 | <u>2</u> 2 |
| Six Months Average Earnings | \$24,770 | <u>\$2,278,825</u> 92 | \$28,092 | <u>\$365,192</u> 13 | \$20,405 | <u>\$1,612,022</u> 79 | \$5,018 | <u>5018</u> 1 |

Table G - Other Outcome Information for the Dislocated Worker Program

| Reported Information | Received Training Services | Num Den | Only Core and/or Intensive Services | Num Den |
|-----------------------------|----------------------------|---------------------------|-------------------------------------|---------------------------|
| Entered Employment Rate | 81.1 | <u>400</u> 493 | 65.3 | <u>258</u> 395 |
| Employment Retention Rate | 89.4 | <u>303</u> 339 | 86.4 | <u>261</u> 302 |
| Six Months Average Earnings | \$20,265 | <u>\$5,674,188</u> 280 | \$20,637 | <u>\$5,035,513</u> 244 |

Table H.1 - Youth (14-21) Results At-A-Glance

| Performance Items | Negotiated Performance | Actual Performance | Numerator | Denominator |
|--------------------------------------|------------------------|--------------------|-----------|-------------|
| Placement in Employment or Education | 80.0 | 67.1 | 202 | 301 |
| Attain Degree or Certificate | 71.0 | 60.7 | 159 | 262 |
| Literacy or Numeracy Gains | 22.0 | 43.3 | 29 | 67 |

WIA Title IB Annual Report Form (ETA 9091)
Report Period: 07/01/2011 to 06/30/2012

Agy./PO: 00-00 State of Montana (Statewide)

Table L - Other Reported Information

| Program | 12 Month Employment Retention Rate | | 12 Month Earnings Change (Adults and Older Youth) Or 12 Month Earnings Replacement (Dislocated Workers) | | Placements For Participants in Non-Traditional Employment | | Wages At Entry Into Employment For Those Who Enter Unsubsidized Employment | | Entry Into Unsubsidized Employment Related to Training | |
|--------------------|------------------------------------|-------------------|---|-----------------------------------|---|------------------|--|---------------------------|--|-----------------|
| | | | | | | | | | | |
| Adults | 86.8 | <u>514</u> 592 | \$6,016 | <u>\$3,344,949</u> 556 | 6.0 | <u>20</u> 334 | \$6,450 | <u>\$2,031,655</u> 315 | 0.0 | <u>0</u> 140 |
| Dislocated Workers | 89.4 | <u>489</u> 547 | 105.9 | <u>\$9,653,727</u> \$9,112,694 | 5.8 | <u>38</u> 658 | \$9,218 | <u>\$5,300,415</u> 575 | 0.3 | <u>1</u> 386 |

Table M - Participation Levels

| Program | Total Participants Served | Total Exiters |
|----------------------------------|---------------------------|---------------|
| Total Adult Customers | 137,617 | 101,067 |
| Total Adults (Self-Service Only) | 135,230 | 99,917 |
| WIA Adults | 136,007 | 100,239 |
| WIA Dislocated Workers | 1,781 | 888 |
| Total Youth (14-21) | 562 | 260 |
| Younger Youth (14-18) | 432 | 193 |
| Older Youth (19-21) | 130 | 67 |
| Out-of-School Youth | 218 | 115 |
| In-School Youth | 344 | 145 |

Table N - Cost of Program Activities

| Program Activity | Total Federal Spending |
|---|------------------------|
| Local Adults | 2,042,125 |
| Local Dislocated Workers | 1,481,447 |
| Local Youth | 2,033,754 |
| Rapid Response (Up to 25%) 134 (a) (2) (A) | 608,412 |
| Statewide Required Activities (Up to 15%) 134 (a) (2) (B) | 761,160 |

| Statewide Allowable Activities 134 (a) (3) | Program Activity Description | |
|--|---|------------------|
| | Technical Assistance for Local Providers | 27,840 |
| | MT Association of Counties | 5,698 |
| | Math and Science Initiative | 71,590 |
| | Work Keys | 728 |
| | Jobs for Montana Graduates | 49,500 |
| | Angel Fund | 23,403 |
| | Eureka Rural Development | 16,645 |
| | National Center for Health Care Informatics | 13,940 |
| | | |
| | | |
| | Total of All Federal Spending Listed Above | 7,136,242 |

WIA Title IB Annual Report Form (ETA 9091)
 Report Period: 07/01/2011 to 06/30/2012

Local Area Name: Concentrated Employment Program (CEP)

Table O - Local Performance

| | |
|---------------------------|--------|
| Total Participants Served | |
| a) Adults | 19,031 |
| b) Dislocated Workers | 182 |
| c) Older Youth | 15 |
| d) Younger Youth | 77 |
| Total Exiters | |
| a) Adults | 13,597 |
| b) Dislocated Workers | 63 |
| c) Youth | 6 |
| d) Younger Youth | 34 |

| Performance Items/Programs | Negotiated Performance | Actual Performance |
|---|------------------------|--------------------|
| Entered Employment Rate | | |
| a) Adults | 81.0 | 85.2 |
| b) Dislocated Workers | 88.0 | 92.2 |
| Retention Rate (6 months) | | |
| a) Adults | 83.0 | 82.7 |
| b) Dislocated Workers | 92.0 | 89.5 |
| Average Earnings/Earnings Change 6 Months | | |
| a) Adults | \$11,700 | \$15,433 |
| b) Dislocated Workers | \$14,600 | \$19,337 |
| Placement in Employment or Education | 80.0 | 74.4 |
| Attainment of Degree or Certificate | 71.0 | 69.2 |
| Literacy or Numeracy Gain | 22.0 | 40.0 |

Description Of Other State Performance Indicators

- a. _____
- b. _____

Overall Status Of Local Performance Not Met Met Exceeded

WIA Title IB Annual Report Form (ETA 9091)
 Report Period: 07/01/2011 to 06/30/2012

Local Area Name: Balance of State (BOS)

Table O - Local Performance

| | |
|---------------------------|---------|
| Total Participants Served | |
| a) Adults | 116,954 |
| b) Dislocated Workers | 1,402 |
| c) Older Youth | 115 |
| d) Younger Youth | 355 |
| Total Exiters | |
| a) Adults | 86,640 |
| b) Dislocated Workers | 726 |
| c) Older Youth | 61 |
| d) Younger Youth | 159 |

| Performance Items/Programs | Negotiated Performance | Actual Performance |
|---|------------------------|--------------------|
| Entered Employment Rate | | |
| a) Adults | 81.0 | 72.8 |
| b) Dislocated Workers | 88.0 | 73.0 |
| Retention Rate (6 months) | | |
| a) Adults | 83.0 | 86.0 |
| b) Dislocated Workers | 92.0 | 87.6 |
| Average Earnings/Earnings Change 6 Months | | |
| a) Adults | \$11,700 | \$15,459 |
| b) Dislocated Workers | \$14,600 | \$20,746 |
| Placement in Employment or Education | 80.0 | 65.9 |
| Attainment of Degree or Certificate | 71.0 | 59.2 |
| Literacy or Numeracy Gain | 22.0 | 43.9 |

Description Of Other State Performance Indicators

- c. _____
- d. _____

Overall Status Of Local Performance Not Met Met Exceeded