

KERR-TAR WORKFORCE DEVELOPMENT BOARD

North Carolina Modification for Local Area Workforce Development Workforce Innovation and Opportunity Act Title I Plans

July 1, 2025 - June 30, 2026

North Carolina Department of Commerce
Division of Workforce Solutions
313 Chapanoke Road, Suite 120
4316 Mail Service Center
Raleigh, NC 27699-4316

Introduction and Instructions

The Workforce Innovation and Opportunity Act (WIOA) requires each Local Area Workforce Development Board (WDB) to develop and submit, in partnership with the chief local elected official (CLEO), a comprehensive four-year plan. Comprehensive Four-Year Plans were submitted in May **2024**.

In North Carolina, annually, each Local Area WDB, in consultation with the chief local elected official, is to provide updates to the Comprehensive Four-Year Plan. The WIOA Program Year (PY) **2025** Plan is to provide current information and be effective **July 1, 2025 - June 30, 2026**, and will include updated current local policies. The Local Area Plan will support the alignment strategy described in the **2024-2027** NC Unified State Plan in accordance with WIOA Section 102(b)(1)(E), and otherwise be consistent with the NC Unified State Plan. Local Area WDBs shall comply with WIOA Section 108 in the preparation and submission of the Plan.

Through its strategic planning efforts, the NCWorks Commission developed a vision and mission for North Carolina's Workforce System. This vision is to build a job-ready workforce to strengthen North Carolina companies, attract new businesses, and ensure our state can adapt to a changing economy. The mission of the state's workforce development system is to ensure North Carolina has an innovative, relevant, effective, and efficient workforce development system that develops adaptable, work-ready, skilled talent to meet the current and future needs of workers and businesses to achieve and sustain economic prosperity and to ensure North Carolinians are ready for the jobs of today and tomorrow by increasing access to education and skills training, fostering employer leadership to prepare workers, and supporting and scaling local innovation.

Federal and State Requirements for Local Administration of the Workforce Innovation and Opportunity Act

Local Area WDBs should reference the Workforce Innovation and Opportunity Act, Public Law 113-128, enacted July 22, 2014. Additional information is available at the U.S. Department of Labor Employment and Training Administration website: <https://www.dol.gov/agencies/eta>.

North Carolina policy information is available at: <https://www.commerce.nc.gov/jobs-training/workforce-professionals-tools-resources/workforce-policies>. Local Area WDBs should reference the North Carolina WIOA Unified State Plan at: <https://www.commerce.nc.gov/north-carolina-wioa-unified-state-plan-2024/open>.

Local Area Plan Submission and Due Date

The Local Area Plan must be submitted through Workforce Information System Enterprise (WISE), the Division's web-based financial system.

The Program Year 2025 - 2026 Plan is Due:
May 1, 2025

Each attachment must be clearly labeled in either Word or PDF format. Forms requiring original signatures may use DocuSign® (or similar) and may be uploaded in WISE.

If original signatures are obtained, forms may be mailed (and must be uploaded in WISE) to the Local Area WDB's assigned Planner at:

Division of Workforce Solutions
313 Chapanoke Road, Suite 120
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I. Local Area Workforce Development Board (WDB) Overview

The Local Area WDB Overview provides important contact information that is used throughout the Division of Workforce Solutions (DWS). This section must remain current during the Program Year. Updates should be submitted to the Local Area WDB's assigned DWS Planner when changes occur.

In the first section and anywhere else in the Local Area Plan, please include the appropriate salutation along with Titles such as Dr., The Honorable, Chairperson, and Judge.

1. Provide the **Local Area WDB's** official (legal) name as it appears on the local Consortium Agreement established to administer the WIOA or, if not a Consortium, in the formal request for Local Area designation.

Kerr-Tar Workforce Development Consortium

- If the Local Area is a Consortium and the agreement has been updated since the PY24 Plan submission, attach a copy of the current Consortium Agreement. If the Consortium Agreement has not been updated since the PY24 Plan submission, state N/A.
 - Name document: N/A
- If the Local Area is not a Consortium and there have been updates to the Local Area designation since the PY24 Plan submission, attach a copy of the formal request for Local Area designation. If the Local Area is not a Consortium and there have not been updates since the PY24 Plan submission, state N/A.
 - Name document: N/A
- If the Local Area WDB officially changed its name, please attach a copy of the Status of Incorporation, attorney's letter, or other document to verify the official name change. If not applicable, state N/A.
 - N/A

2. Provide the name, title, organization name, address, phone number, and email address of the **Local Area WDB Director**.

Name: Lou Grillo	Title & Salutation: Workforce Development Director
Organization Name: Kerr-Tar Regional Council of Governments	Address: P.O. Box 709 Henderson, N.C. 27536
Phone Number: (252) 436-2040	Email Address: lgrillo@kerrtarcog.org

3. Provide the name, elected title, local government affiliation, address, phone number, and email address of the **Chief Local Elected Official (CLEO)**.

Name: Rob Williford	Elected Title & Salutation: County Commissioner
Government Affiliation: Granville County Board of County Commissioners	Address: P.O. Box 906, Oxford NC 27565

Phone Number: 919-693-4761	Email Address: rob.williford@granvillecounty.org
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4. Provide the name, title, business name, address, phone number, and email address of the **individual authorized to receive official mail for the Chief Local Elected Official (CLEO)**, if different than question 4.

Name: N/A	Title & Salutation: Click here to enter text.
Business Name: Click here to enter text.	Address: Click here to enter text.
Phone Number: Click here to enter text.	Email Address: Click here to enter text.

5. Provide the name, title, organization name, address, phone number, and email address of the **Administrative/Fiscal Agent responsible for disbursing Local Area WIOA grant funds**. [WIOA Sections 107(d)(12)(B)(i)(III) and 108(b)(15)].

Name: Patricia S. Cox	Title & Salutation: Executive Director
Organization Name: Kerr-Tar Regional Council of Governments	Address: P.O. Box 709 Henderson, N.C. 27536
Phone Number: (252) 436-2040	Email Address: dcox@kerrtarcog.org

6. Provide the name, title, organization name, address, phone number, and email address of the **Administrative/Fiscal Agent's signatory official**.

Name: Patricia S. Cox	Title & Salutation: Executive Director
Organization Name: Kerr-Tar Regional Council of Governments	Address: P.O. Box 709 Henderson, N.C. 27536
Phone Number: (252) 436-2040	Email Address: dcox@kerrtarcog.org

7. Attach a copy of the **Administrative Entity/Fiscal Agent's organizational chart** with an 'effective as of date'.

- Name document: ***Kerr-Tar Regional Council of Governments Organizational Chart***.

8. Provide the **Administrative Entity's Unique Entity Identifier (UEI)** number and assurance that the 'System for Award Management' (SAM) status is current. Administrative Entities must register at least annually on the SAM website <https://sam.gov/content/home> to receive Federal funding [required by Federal Acquisition Regulation (FAR) Section 4.11 and Section 52.204-7].

9. Provide the name of the **Local Area WDB's Equal Opportunity Officer** who shall be responsible for assuring that discrimination does not occur in its programs or projects. (CPS 10-2021, Change 1)

Kelly Hundley

10. Provide each **Local Area WDB member's** name, business title, business name and address, phone number, and email address on the provided form. The first block is reserved to identify the Local Area WDB chairperson (*form provided*). Indicate all required representation and if the category is vacant. [WIOA Section 107(b)(2)].

- Name document: ***Kerr-Tar Workforce Development Board List***.
- Composition of the Local Area WDBs shall comply with WIOA Section 107. Local Area WDB Membership Requirements have been provided as a reference in [Appendix D](#).
- If a Local Area WDB list is not in compliance, please provide the current list and state the expected date that a compliant list will be provided (detailing vacant positions). Do not change required category names except to clarify those representing multiple categories. When determining the total number of members, representatives serving in more than one category must be counted and listed only once on the form. Identify any names representing a dual category with an asterisk (*).

Notes:

- Please complete the entire form. Check the block on the last page of the form certifying compliance with the required WIOA Local Area WDB business nomination process.*
 - Representatives with expired terms will not be included in the counted list of Board members.*
 - Board member terms must be stated in a month/date/year format.*
 - Plans that do not have a compliant workforce Board will not receive Final Approval. Formula funds will not be awarded until the Local Area WDB has a compliant workforce Board. Exceptions are allowed only when realignment is occurring in the upcoming program year.*
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The Chief Local Elected Official must establish by-laws consistent with applicable local procedures, state, and federal laws to include WIOA Final Rules and Regulations 679.310(g). The Local Area WDB shall submit by-laws that clearly demonstrate all WIOA and North Carolina required elements described in [Appendix A](#). Additional by-laws guidance/template and electronic meeting formats have been provided in [Appendix B](#) and [Appendix C](#).

11. Attach the Local Area WDB By-Laws including the date adopted/amended, if they have been updated since the PY24 Plan submission. Please state N/A if the By-Laws have not been updated since the PY24 Plan submission. By-Laws must include the required elements found in [Appendix A](#).

- Name document: N/A

12. To demonstrate that the attached Local Area WDB By-Laws comply, complete the By-Laws Required Elements – Crosswalk chart if the By-Laws have been updated since the PY24 Plan submission (form provided). Please state N/A if the By-Laws have not been updated since the PY24 Plan submission.

- Name document: N/A

Sunshine Provision – The Local Area WDB shall make available to the public, on a regular basis through electronic means and open meetings, information regarding the activities of the Local Area WDB, including information regarding the Local Area Plan prior to submission of the Local Area Plan, and regarding membership, the designation and certification of one-stop operators, and the award of grants or contracts to eligible providers of youth workforce investment activities, and on request, minutes of formal meetings of the Local Area WDB. [WIOA Section 107(e)]

13. Describe how the Local Area WDB will make copies of the proposed Local Area Plan available to the public. If stating the Local Area Plan will be on the Local Area WDB website, provide the link, as well as the individual's contact information for the distribution of the Plan. [WIOA Section 108(d) and 108(b)(20)]

Local Area Plans are posted on the Administrative Entity's website (Kerr-Tar COG) under Workforce Development and a hardcopy of the completed plan is available for review in the office.

<https://www.kerrtarcog.org/workforce-development/wioa-local-area-plan>

Public Comment – The Local Area WDB shall make copies of the proposed Local Area Plan available to the public through electronic and other means, such as public hearings and local news media; allow for public comment not later than the end of the 30-day period beginning on the date the proposed Local Area Plan is made available; and, include with submission of the Local Area Plan any comments that represent disagreement with the Local Area Plan. [WIOA Section 108(d) and 108(b)(20)]

14. Attach a copy of the Local Area WDB's organizational chart with an 'effective as of date.' Include position titles, names, and contact information.

- Name document: **Kerr-Tar Workforce Development Board September 10, 2024 Organizational Chart.**

15. Complete the following chart for the PY2025 Local Area WDB's planned meeting schedule to include, the date, time, location, and virtual link (if applicable). (Expand form as needed)

Date	Time	Location (include address, room # and virtual link)
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September 9, 2025	6:00 p.m.	Kerr-Tar COG, 1724 Graham Avenue, Henderson, N.C. Board Room
December 9, 2025	6:00 p.m.	Kerr-Tar COG, 1724 Graham Avenue, Henderson, N.C. Board Room
March 10, 2026	6:00 p.m.	Kerr-Tar COG, 1724 Graham Avenue, Henderson, N.C. Board Room
June 9, 2026	6:00 p.m.	Kerr-Tar COG, 1724 Graham Avenue, Henderson, N.C. Board Room

***Note:** All Local Area WDB meetings shall be held in accessible facilities. All materials and discussions should be available in an accessible format upon request as indicated under North Carolina-specific requirements detailed in [Appendix A](#).*

16. Provide the Month and Date of the Local Area WDB meeting that the PY25 Local Area Plan was approved. Attach a copy of the Local Area WDB minutes that reflect this action item.

- Name document: **Kerr-Tar Workforce Development Board Plan Approval Minutes.**

17. Attach a copy of the signed ‘Certification Regarding Debarment, Suspension, and Other Responsibility Matters – Primary Covered Transactions’ Form (*form provided*). [Required by the Regulations implementing Executive Order 12549, Debarment and Suspension, 2 CFR 180, participants’ responsibilities.]

- Name document: **Kerr-Tar Workforce Development Board Certification Form.**

Documents must have the original signature or DocuSign® (or similar) of the Administrative Entity signatory official. If using original signatures, mail the signed Certification form to the assigned DWS Planner at:

N.C. Division of Workforce Solutions
313 Chapanoke Road, Suite 120
4316 Mail Service Center
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18. Submit the original Local Area WDB and Chief Local Elected Official (CLEO) Signatory Page (*form provided*), bearing the original signatures of the CLEO(s) and the Local Area WDB Chairperson, and attach a copy of the signed document if not using DocuSign® (or similar).

- Name document: **Kerr-Tar Workforce Development Board Signatory Page.**

If using original signatures, mail the Signatory Page to the assigned DWS Planner at:

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II. Local Area WDB Strategic Planning

The Local Area WDB is required to keep the Local Area Plan up to date and adaptable as events and funding changes occur, which may require local area responses. Local Area Plans will require an annual modification. North Carolina has implemented integrated services delivery with an enhanced emphasis on regional planning and services. This approach is consistent with federal, state, and regional initiatives and opportunities. North Carolina's workforce development system includes businesses, organizations, agencies, employed and unemployed persons, training and educational institutions, adults, and youth. To enhance services to all constituents, aligning workforce development planning and services with regional labor markets is both effective and productive.

At the local level, the Local Area WDBs are creatively working to address the new challenges of job growth and expansions. Employers in Local Area WDB areas continue to have a shortage of lower-wage, entry-level and middle-skilled level workers. As a Local Area WDB and workforce system, Local Area WDBs are leveraging resources and engaging in new partnerships that include the business community, economic developers, chambers of commerce, NCWorks Career Centers, community colleges, public schools, and community partners. Working together, Local Area WDBs are paving the way for an even stronger economy through sector partnerships and career pathways initiatives.

1. Based on the history of economic development projects in the Local Area, how many projects does the Local Area WDB expect to engage in during the upcoming program year? Please indicate the type of services the Local Area WDB expects to provide.

Updated - The KTWDB engages in approximately 1 economic development project per quarter per county for a total of about 20 projects per year. The projects can be of varying size and have a wide variety as far as complexity of the request. Some projects have simple data and basic workforce service overview request and others although rare have included presentations to potential companies interested in relocation or starting a business in our local area. KTWDB is most frequently involved in face to face and virtual meetings with economic development and companies interested in starting or expanding a business in the local area. The WDB Business Services Manager also coordinates activities that involve the regional economic developers. Examples of those annual events include regional multi-employer job fairs that are rotated through each of our 5 counties and each includes a 5 county employer presence, a Bi-Annual Business & Industry Connect Summit (in partnership with Vance Granville Community College) as well as quarterly industry lead collaborations. The KTWDB collaborated with VGCC staff to host all 5 county ED Directrs in planning sessions for the October 31, 2024 BIC Summit to develop and further conversations around strategies for sector partnerships which continues to be a part of the regional ED plan.

2. Identify any **new** Career Pathways developed by the Local Area since the last Local Area Plan submission. Complete the chart below.

Pathway Name	Partner WDBs	Year the pathway was developed	Number of trainees (to date) who have utilized the pathway
N/A	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.	Click here to enter text.

a. Does the Local Area have plans for the creation and implementation of new career pathways?

Not at this time.

III. NCWorks Career Centers

North Carolina's workforce system includes multiple agencies, programs, and funders. Collaboration, policy alignment, systemic communication, integration, and modernization of the workforce system will ensure a strong and healthy workforce system that can adapt to a changing economy.

For any documents that are missing or are unnecessary based on the response provided, please state, "No document is loaded and/or it will be loaded by a specific date".

1. Identify PY 2025 NCWorks Career Center location(s) including Comprehensive (Tier I) and Access Points (Affiliate or Specialized) Sites; On-site partners; how NCWorks Career Center operator(s) are designated and procurement information; provider(s) of WIOA career services and method of selection; whether the youth service provider is on-site and, if so, youth services offered. Use the PY 2025 NCWorks Career Center Chart. [WIOA Section 121(b)(1)(A) and (b)(1)(B)]

- Name document: Kerr-Tar WDB PY 2025 NCWorks Career Centers.

2. Provide the name(s) of the current One-Stop provider(s), date, and process for when the competitive procurement of the One-Stop Operator(s) occurred. Include the expected length of the contract(s) (one to four years and the current year the contract is (e.g., two of three years). [WIOA Section 108(b)(16)]

On November 2, 2022 Kerr-Tar WDB released a RFP for Bidders for One-Stop Operator. The RFP contained the scope of services, guidelines and requirements, and scoring criteria. An information session was held at the COG office on November 16, 2022 for interested respondents. One proposal was received by the December 16, 2022, 12:00 noon deadline. The proposal was reviewed by Board staff and independent reviewers to assure an arm's length relationship between Board staff in the review process. The RFP was scored with a passing grade and the NC Commerce Department of Workforce Solutions (DWS) was selected for recommendation. At the March 14, 2023 WDB meeting, it was recommended and the Board approved DWS as the One Stop Service provider for PY 2023 beginning July 1, 2023 and ending June 30, 2024.

At the June 11, 2024 WDB meeting, it was recommended and the Board approved DWS as the One Stop Service provider for PY 2024 beginning July 1, 2024 and ending June 30, 2025.

3. Attach the Memorandum of Understanding(MOU) between the Local Area WDB and partners concerning the operation of the NCWorks Career Center system. [WIOA Section 121(c)(1)(2)(A)]

- Name document: Kerr-Tar WDB NCWorks Career Center MOU.

IV. Performance

The U.S. Department of Labor (USDOL) has the following WIOA Performance Indicators:

- Employment Rate – 2nd Quarter After Exit
- Employment Rate – 4th Quarter After Exit
- Median Earnings – 2nd Quarter After Exit
- Credential Attainment Rate
- Measurable Skill Gains
- Effectiveness in Serving Employers (system-wide measure, not program-specific)

1. Examine the Local Area WDB's current Adult, Dislocated Worker, and Youth performance on the Federal Primary Indicators of Performance for PY 2023-2024 and prior Program Years. (Reports available via FutureWorks BI.) What are some factors that have impacted performance levels both positively and negatively in the current program year?

a. Provide at least two examples of positive factors and two examples of negative factors with an explanation of each. Some examples to consider include:

- unemployment rate
- factory closures/openings
- economic development recruitment
- retention and expansion efforts
- regional industry growth priorities
- weather events and natural disasters that may have impacted the area
- internal operational factors

b. Are there any factors that you anticipate will impact your performance during the upcoming program year(s) either positively or negatively?

The Kerr-Tar Workforce Development Board (KTWDB) has continued to serve populations with significant barriers to employment, yet performance on the Federal Primary Indicators of Performance has been shaped by both positive and negative factors in the current and prior program years.

Some of the positive factors include strong community partnerships and career development support. The ongoing collaboration between training providers, employers, and economic development partners has positively influenced performance outcomes such as credential attainment and employment after training exit. Career-center staff provide support and structured workshops, increasing job readiness and success rates for participants across all WIOA programs.

Labor market shifts and expanded opportunities continue to bring positive changes as the economy continues to shift post-pandemic and amid inflation, there is an increased demand for retraining and upskilling. The workforce board's response, including investments in high-demand training programs and recruitment of work-based learning opportunities, has improved outcomes in employment retention and median earnings, especially for Adult and Dislocated Worker populations seeking career advancement.

Some of the negative factors that continue to hamper progress in our area include transportation barriers. Transportation remains a major barrier for participants in the Kerr-Tar region, particularly youth and individuals in high-poverty areas. The rural geography and inadequate public transit infrastructure hinder consistent access to one-stop centers, limiting engagement, program completion, and employment outcomes. Operational staffing challenges that include high staff turnover and onboarding of new personnel with limited WIOA experience have also negatively affected internal efficiency and service delivery. Reduced staffing compared to previous program years has also placed a strain on operations, affecting performance indicators such as participant engagement, case management, and follow-up support.

b. Anticipated Factors for Upcoming Program Year(s)

Continued focus on In-Demand industries with ongoing efforts to align training programs with regional industry priorities, there is potential for higher credential attainment and employment rates among participants. Expansion of State-Approved training providers will also help increase access to high-quality training options that could boost overall performance across indicators like skills gain and employment after exit.

Other potential challenges could include unemployment rates since currently, two out of the five counties in our region are experiencing increasing unemployment, which could negatively affect employment-related performance indicators. Data collected from the D4 NC Commerce website is provided in the following chart for Unemployment Rates and Trends by County:

County	PY22	PY23	PY24
Franklin	3.5	3.3	3.3
Granville	3.6	3.4	3.5
Person	3.6	3.5	3.4
Vance	5.1	4.6	4.4
Warren	5.4	4.5	4.7

2. What strategies and methods are in place to meet or exceed performance goals? Include information about tracking performance, ensuring accountability of positive performance outcomes, and training.

Consider including the following information:

- Who is responsible for tracking performance?
- Which reporting resources are used?
- Is FutureWorks BI employed? If so, how, and how often?
- How often is training provided to staff?

The Kerr-Tar WDB employs dedicated WIOA staff whose primary roles include ensuring compliance and meeting performance outcomes. The staff maintain long-standing relationships with the communities we serve, our external WIOA partners (Business, Community Colleges, and Training Providers), and internal partners (DWS, NCWorks Commission, COGs, and other WDBs). Maintaining strong partnerships is vital to the success of our performance and ensures reliable training outcomes for participants. Furthermore, implementation strategies are in place to maintain and improve customer flow and access to training and employment services. For example, we are enhancing partnerships between the Vance County Kittrell Job Corps and the NCWorks Career Center to meet the 20% WEX expenditure requirement for WIOA Youth.

Adequate case management that involves tracking outcomes through NCWorks online and FWS-Bi systems are key to collecting proper documentation to support the attainment of positive performance outcomes. Performance is tracked using FutureWorks BI, NCWorks Online detailed reports, and internal predictive reports and rosters generated by management and WDB Program Coordinators. Staff are expected to correct data issues immediately, and our designated Superuser supports with NCWorks data updates and corrections.

Kerr-Tar continues to develop detailed process flows based on field experience to standardize service delivery. This promotes consistency, clarifies staff responsibilities, and helps identify root causes of any performance issues. Cross-training of staff is ongoing, allowing team members to function efficiently and innovatively. Case managers also actively build relationships with local training providers, which strengthens communication and supports our ability to sustain service delivery despite reductions in career center staffing.

Career Center staff receives weekly onsite technical assistance and participate in webinar trainings. Staff also use or will use the NCWorks Online “Live Chat”, and the new document collection and upload features to support virtual or in-person confidentiality-based WIOA enrollments. Additionally, the Performance & Accountability Coordinator facilitates monthly “Power Trainings”, monthly and need-based performance meetings, quarterly performance training sessions, weekly Data Analyst discussions, and Service Provider Program Management meetings with EDSI local management staff to ensure that staff are following current WIOA guidelines and receiving technical assistance as needed.

Continuous learning is central to our strategy for producing positive performance outcomes. By staying engaged, staff strengthen their accountability, adopt new tools and methods, and reinforce a data-driven, results-oriented culture. Staff are encouraged to use the NCWorks Training Center and Staff Resources, and to carve out time to attend workforce conferences for continued professional and personal growth, and accountability. Participation in events like NCWorks Partnership, SETA, NCETA, and Geographic Solutions

provides updates on best practices, service delivery strategies, and compliance, contributing directly to improved performance in employment, skills gains, and credential which are key to better outcomes in employment, skills gains, and credentials. This type of continuous learning strategy supports professional growth and boosts morale and accountability leading to more motivated staff who are focused on meeting performance targets. Through training and collaborative efforts, staff can connect with peers and partners, gaining new ideas and forming partnerships that support participant success and improve local outcomes. Faster adoption and the exposure to new tools and strategies also helps staff bring back practical solutions that enhance performance and tracking.

Finally, these performance enhancing strategies produces greater accountability, which is one of the key strategies being employed by Kerr-Tar WDB to improve and produce positive performance goals, and ongoing learning helps staff understand their impact on performance goals and supports a culture focused on data and results. The Team continues to design detailed process flows based on practical experience and to standardize service delivery. The result is a more consistent and clearer vision for understanding each team member's functions, as well as helping to identify root cause in deficiencies that may affect performance. Kerr-Tar will continue to cross-train staff to function seamlessly and in innovative ways. The case management team continues to expand their duties to include developing and cultivating relationships with local area training providers. Facilitating this level of communication, collaboration, and accountability allows our local area to continue its service model and produce positive performance outcomes despite current turnover rates with service provider staff and changes within the WIOA staffing structure.

3. Discuss what corrective action steps are in place if, at any point during the program year, the Local Area WDB is not on track to meet or exceed yearly performance indicator goals.

This question is intended to be hypothetical and is seeking what plan the Local Area WDB has in place to address failing performance, if it were to occur. Answers should address how the Local Area WDB:

- monitors performance,
- communicates with staff,
- makes changes to Local Area WDB performance and training strategies based on reporting data,
- and utilizes follow-up accountability measures.

Currently, the Kerr-Tar Local Area WDB is on track to meet or exceed performance indicator goals for WIOA and Wagner-Peyser (WP) programs serving adults, dislocated workers, and youth with the exception of Adult Employment Rate 4th Quarter after Exit. However, Kerr-Tar is employing robust tactics in an effort to successfully meet the 90% or greater expectation for this indicator goal, which is currently at 76.43% achieved. The Youth Credential Attainment rate is standing at 81.76%, and Youth Measurable Skill Gains rate at 83.4% achieved. Both indicators are progressing steadily and are expected to meet expectations by the final reporting period. If corrective action becomes necessary due to any insufficiency in expected performance outcomes, the Workforce Development Director will collaborate with the Kerr-Tar WDB Performance & Accountability Coordinator, Program Specialist, and Youth Program Coordinator to develop a Corrective Action Plan focused on continuous improvement. Critical discussions on the need to meet or exceed yearly performance goals will continue to be emphasized among the team as follows.

Corrective Action Approach: Hypothetically, if and when a corrective action plan is required, the specific

performance insufficiency will be identified, addressed directly with the service provider and the local area team, and summarized in a written report. All formal corrective actions will be implemented and guided by the Workforce Development Board Director. The WDB Performance & Accountability Coordinator will continue to conduct monthly performance meetings and staff training sessions. In addition, staff are required to attend quarterly “Kerr-Tar Performance Matters” meetings, where they review performance data, identify any barriers affecting performance, and propose resolutions. A quarterly performance report is generated to allow the team to track, trend, identify, and reconcile performance data, ensuring that accurate information is consistently keyed into NCWorks Online.

Roles and Responsibilities: Tracking performance indicators is a shared responsibility among the WDB Performance & Accountability and WIOA Program Coordinator staff, WIOA Service Provider Program Managers (or designees), Data Analyst, and NCWorks Center Managers (or designated DWS staff).

Corrective Action and Resolution Strategies: The Performance & Accountability Coordinator routinely shares performance updates with All WIOA and WP Staff. Performance data is monitored using NCWorks Online system reports and FutureWorks-Bi reports. If deficiencies are identified, NCWorks Predictive Reports and FutureWorks Predictive Rosters will be employed to analyze, reconcile, and address data relevant to performance indicators such as the “Entered Employment” fourth quarter after Exit, “Credential Attainment” and “Measurable Skill Gains”. For example, Predictive Rosters may reveal customers who should be contacted to submit supplemental documentation to support the "Entered Employment" indicators. Performance monitoring also highlights where customer follow-up services require additional staff attention and identifies keying or data entry issues that need to be corrected or improved. Through these proactive strategies, Kerr-Tar Local Area WDB remains committed to ensuring accurate reporting, continuous quality improvement, and the successful achievement of the Local Area’s WIOA and WP performance goals.

4. How is performance information shared throughout the hierarchy of staff? Please detail how the Local Area WDB addresses performance data in its relationship with its service provider(s) and how case managers are using performance data to drive Local Area WDB performance.

Consider including the following information:

- a. How is performance tracked in your organization?
- b. How is performance information communicated with staff?
- c. How are staff/contractors held accountable?
- d. How is training provided in your organization?

Performance is tracked using NCWorks Online, FutureWorks BI, internal reports, and predictive dashboards. The WDB Performance and Accountability Coordinator and Program Specialist and youth program coordinator staff monitor data regularly and review reports with service providers to identify trends, address issues, and improve outcomes.

Performance information is shared with frontline staff and service providers during monthly performance team meetings, weekly check-ins with the Data Analyst, Program Manager and Program Coordinator and all career center staff through monthly Kerr-Tar Team Leadership meetings, weekly NCWorks All-Staff meetings, ongoing technical assistance and WIOA Power Trainings. Staff receive performance updates,

guidance on key indicators, a review of new performance policy and procedures, ongoing assistance with outreach, help with tracking performance outcomes, plan of action strategies, goals and expectations for continuous improvement. Performance data is also used to emphasize where customer follow-up services requires staff attention; and to identify keying/data entry issues and determine if there are other ways to address or remedy those issues

Staff and Service Providers are held accountable through regular case file reviews, oversight review, data validation checks, and performance monitoring. Corrections are required immediately, and performance is reviewed during staff evaluations and contractor monitoring.

Training is provided through the NCWorks Training Center, webinars, state-led sessions, and in-house trainings. Staff are also encouraged to attend workforce conferences to stay informed on best practices, which directly supports improved service delivery and performance outcomes.

5. Discuss the factors that contribute to the Local Area WDB's credential attainment indicator.
 - a. What are the challenges that the Local Area WDB faces in achieving its credential attainment goal?
 - b. What are some of the strategies that contribute to the Local Area WDB's success in achieving its credential attainment goal?
 - c. How do case managers make use of NCcareers.org and the NC Workforce Credentials list?

The Kerr-Tar Local Area WDB faces a variety of challenges in meeting its credential attainment goals. These include both systemic and participant-level barriers such as participants facing challenges such as lack of childcare, unstable housing, transportation issues, financial insecurity, and health concerns. These can delay or interrupt training, leading to dropouts and negatively impacting both Measurable Skills Gains (MSG) and credential attainment.

Loss of participant contact is especially prevalent among youth, losing touch with participants can halt services and prevent the submission of necessary documentation for credential verification. Participants often disengage without notifying staff, or become unreachable due to life circumstances, including incarceration or relocation.

Significant staff shortages and turnover rates among service providers can also disrupt the consistency of support provided to participants. Without stable guidance, participants may lack the motivation or resources needed to complete training and earn credentials and this also impacts KTWDB's ability to track credential attainment and adjust programming accordingly.

b) Strategies That Support Credential Attainment Success

Despite these challenges, the Kerr-Tar Local Area WDB employs a variety of strategies to promote success including comprehensive assessments to identify participants' academic levels, strengths, and career interests. This data informs Individual Employment Plans (IEPs) and Individual Service Strategy Plans (ISSPs), designed with S.M.A.R.T. goals that help participants stay focused and progress toward credential completion. Outreach campaigns increase awareness of in-demand credentials, and close partnerships with employers ensure that training aligns with labor market needs. Events like our weekly "Workforce

Wednesday” bring together job seekers, training providers, and businesses to create real-time pathways to credentials and employment. The KTWDB also prioritizes sector strategies in Advanced Manufacturing, Healthcare, Construction, and Information Technology—high-growth areas offering clear, progressive credentialing opportunities that lead to higher wages and long-term career stability.

Work Experience (WEX) and On-the-Job Training (OJT) opportunities allow participants to earn while learning, increasing engagement and practical skills that lead to credentials. These models also ease the burden on understaffed centers by relying on employer mentorship.

Supportive Services and Monitoring: Career counseling, job placement assistance, transportation assistance, and allowable incentives are offered to help participants overcome obstacles. File monitoring and data validation ensure accurate performance reporting, while predictive reporting tools help staff stay on track with performance goals.

c) How do case managers make use of NCcareers.org and the NC Workforce Credentials list?

NCcareers.org: Case managers make use of NCcareers.org by accessing comprehensive information and informed choices about career pathways, job opportunities, and training programs in North Carolina. They can then use information to guide individuals towards resources that help them explore careers aligned with their interests and skills through providing a snapshot of different careers to include job descriptions, salaries, and education that is needed for a career, etc.

NC Workforce Credentials list: Kerr-Tar case managers and career advisor staff also utilizes the NC Workforce Credentials list to identify industry-recognized credentials that are in demand by our local employers. They can advise individuals on which credentials to pursue based on their career goals and the local job market demand. Our local area uses the Information to review sustainable wages and in-demand certifications with participants. This is particularly helpful prior to enrolling individuals in training to decide if the training and credential attainment aligns to produce high demand employment and favorable opportunities for earning self-sufficient wages.

In reviewing both resources with individuals, staff and individual are better able to assess career needs and desires, and develop a stronger Career Plan, the Roadmap towards successful training, and MSG and credential attainment outcomes. Overall, by addressing these factors and employing effective strategies while leveraging resources like NCcareers.org and the NC Workforce Credentials, our Local Area WDB’s can enhance our efforts in achieving its credential attainment goals under the WIOA MSG Indicator.

6. When selecting an eligible training provider from the State Eligible Training Provider List to certify for local use, what is the review process the Local Area WDB uses to make this decision? How does the Local Area WDB ensure informed customer choice in the selection of training providers? In other words, how are customers advised that they have options in choosing their provider? [WIOA Section 108(b)(19)]

The Kerr-Tar Workforce Development Board (WDB) utilizes the State-maintained Eligible Training Provider List (ETPL), which includes training providers and training, education and apprenticeship programs vetted and approved by the NC Division of Workforce Solutions (DWS). The State’s ETPL Coordinator and team conduct the initial eligibility and review process, ensuring that providers meet all federal and state criteria, including alignment with high-demand occupations, provision of industry-recognized credentials, and a track record of performance.

At the local level, the Kerr-Tar WDB shares a role in the ETPL review process, which is to coordinate and

communicate with the State on an ongoing basis to make sure our local area has a significant and diverse number of training providers offering multiple careers and training services to job seekers that best meets their individual needs and complements their training, education, and employment goals. This process helps to ensure that informed customer choices are maximized and leads to competitive integrated employment for our customers. Additionally, the Kerr-Tar WDB's Performance & Accountability Coordinator, or designated staff, reviews providers from the ETPL to determine which programs to endorse for local use. This local review prioritizes training programs that align with current labor market information (LMI), workforce needs, and employer demand within the Kerr-Tar region. Providers with proven outcomes, regional engagement, and a commitment to successful job placement are favored to ensure relevance and return on investment.

Moreover, to help ensure well-informed customer choice for our job seekers, NCWorks Career Center staff are able to provide customers with individualized career counseling, access to multiple tools and resources used for career skills assessment and planning, up-to-date LMI, and entrance to the ETPL through the NCWorks Online system that provides relevant information about the list of in demand training programs and ensures that job seekers can make an informed customer choice regarding career pathways, apprenticeship, and training that leads to employment in high wage jobs/careers.

To ensure informed customer choice, the Kerr-Tar WDB and NCWorks Career Center staff provide, skills assessments, and access to real-time LMI. Customers are introduced to the ETPL via the NCWorks Online platform, where they can view available training programs, performance metrics, costs, duration, and credential outcomes. Career advisors explain the variety of training options available and assist customers in selecting a training provider that best aligns with their career goals, interests, and skill levels. Staff emphasize that participation in training is based on customer choice, not provider preference.

The Kerr-Tar WDB ensures that job seekers understand their options and are supported in making training decisions that lead to meaningful, self-sufficient employment in high-demand occupations.

7. Indicate whether the Local Area WDB has additional requirements for training providers above and beyond those requirements stated in the State ETPL policy. Does the Local Area WDB make use of USDOL's trainingproviderresults.gov website in its evaluation of which training providers to certify for local area use? If so, how? Attach the Local Area ETPL Policy, if it has been updated since the PY24 Plan submission.

All Training Providers are evaluated based on state ETPL policy and procedures. If necessary, the WDB may use stricter performance metrics to evaluate ETPs and to certify locally based on LMI and additional resources. However, Kerr-Tar WDB does not generally make use of USDOL's trainingproviderresults.gov website in its evaluation of which training providers to certify for local area use; although staff has visited this website for the intent of creating awareness.

Name Document: Updated or N/A? KTWDB ETPL Policy.

V. Equal Opportunity

1. Attach the Local Area WDB's current Equal Opportunity (EO) Complaint Grievance Procedure to address EO requirements, if it has been updated since the PY24 Plan submission. If the EO Complaint Grievance Procedure has not been updated since the PY24 Plan submission, please state N/A.[29 CFR 38.35].

- Name document: [Updated or N/A?](#) Local Area WDB Name *EO Complaint Grievance Procedure.*

VI. Adult and Dislocated Worker Services

1. Provide the date and process for the competitive procurement of the Adult and Dislocated Worker Programs that ensure an arms-length relationship between the Local Area WDB and service delivery. Include the expected length of the contract(s) (one to three years and the current year status of the contract (e.g., two of three years). Identify any service provider contract extensions. [WIOA Section 108(b)(16), CPS 04-2022, Change 1]

On November 2, 2022 Kerr-Tar WDB released a RFP for Bidders for Adult/Dislocated Worker Intergrated Services. The RFP contained the scope of services, guidelines and requirements, and scoring criteria. An information session was held at the COG office on November 16, 2022 for interested respondents. Two proposals were received by the December 16, 2022, 12:00 noon deadline. The proposals were reviewed by Board staff and independent reviewers to assure an arm's length relationship between Board staff in the review process. The highest scoring RFP was Educational Data Solutions, Inc. At the March 14, 2023 WDB meeting, it was recommended and the Board approved going into contract with EDSI for an initial year, with the option to renew if performance is satisfactory. Board staff do not conduct any direct services, but only provide oversight, training, technical assistance, and invoice reviews for Adult/DW Service Providers. At the June 11, 2024 WDB meeting, after satisfactory performance, it was recommended and the Board approved renewing EDSI as the Adult/Dislocated Worker service provider for a second year beginning July 1, 2024 and ending June 30, 2025.

Note: While Final Regulations Section 679.410 (b) and (c) provide exceptions to the competitive procurement process, Local Area WDBs must have an arms-length relationship to the delivery of services.

2. Attach the Local Area WDB's Adult/Dislocated Worker Service Provider list effective July 1, 2025, using the PY 2025 Adult/Dislocated Worker Service Provider List [provided](#).

- Name document: Kerr-Tar WDB *PY 2025 Adult/Dislocated Worker Service Provider List.*

VII. Youth Services

USDOL provides funds to states who in turn provide local workforce areas resources to deliver a comprehensive array of youth services that focus on assisting out-of-school youth and in-school youth with one or more barriers to employment, prepare for post-secondary education and employment opportunities, attain educational and/or skills training credentials, and secure employment with career/promotional opportunities. USDOL and North Carolina's priorities are:

- Out-of-School Youth (OSY) – A minimum of 75% of the Youth funds allocated to Local Area WDBs, except for the Local Area WDB expenditures for administration, must be used to provide services to OSY;*
- Work Experience – Not less than 20% of Youth funds allocated to the Local Area WDB, except for the Local Area WDB expenditures for administration, must be used to provide paid and unpaid work experiences; and a*
- Focus on Partnering – Co-enrollment is encouraged where appropriate with Title II and IV.*

1. Attach the Local Area WDB Youth Service Provider's chart, effective July 1, 2025, using the PY 2025 Youth Service Provider List provided. Complete each column to include specifying where Youth Services are provided and procurement information.

- Name the document: *PY 2025 Local Area WDB Name Youth Service Provider List.*

2. Provide the date and process for the competitive procurement of the Youth Programs that ensures an arm's-length relationship between the Local Area WDB and service delivery. Include the expected length of the contract(s) (one to three years and the current year status of the contract (e.g., two to three years). Identify any service provider contract extensions. [WIOA Section 108(b)(16), CPS 04-2022, Change 1]

On November 2, 2022 Kerr-Tar WDB released a RFP for Bidders for WIOA Youth Services. The RFP contained the scope of services, guidelines and requirements, and scoring criteria. An information session was held at the COG office on November 16, 2022 for interested respondents with a call-in option. Three proposals were received by the December 16, 2022, 12:00 noon deadline. The proposals were reviewed by Board staff and independent reviewers to assure an arm's length relationship between Board staff in the review process. The highest scoring RFPs were Educational Data Solutions, Inc. (EDSI) and Vance-Granville Community College (VGCC). At the March 14, 2023 WDB meeting, it was recommended and the Board approved going into contract with EDSI and VGCC for one year.

At the June 11, 2024 WDB meeting, after satisfactory performance, it was recommended and the Board approved renewing EDSI as the Adult/Dislocated Worker service provider for a second year beginning July 1, 2024 and ending June 30, 2025.

USDOL granted North Carolina a waiver for Program Years 2022-2025 which reduced the minimum Title I Youth expenditure rate requirement for OSY from 75% to 50%. Implementing this waiver for the OSY expenditure rate allows the maximum expenditure rate for in-school youth (ISY) to be increased from 25% to up to 50%. While this waiver has been granted, Local Areas are not required to implement it.

3. Provide the Local Area WDB's approach to meeting the required 75% minimum (NextGen) youth expenditures on out-of-school youth and include special outreach efforts and highlight planned program design.

If the WDB is choosing to implement the WIOA Title I OSY 75% expenditure requirement waiver for PY 2025, please state N/A for the question above and respond appropriately to questions a – c.

If the WDB does not desire to implement the waiver, please state N/A for questions a, b, and c.

- a) State how the WDB will achieve the 50% OSY expenditure rate and describe the steps that will be taken to comply with the WDB's programmatic goals and outcomes.
- b) Describe why there is a need to serve additional ISY in the local area region and state how the WDB will achieve the 50% ISY expenditure rate.
- c) Describe how the local area region will be able to meet the demand for youth services by using the waiver.

[WIOA Section 129(a)(4)(A)] (CPS 09-2021, Change 1) (OG 07-2022, Change 2)

Staff of the WDB will determine when negotiating contract amounts and budgets with Youth Service providers that the 75% and 25% rates are reflected in the budget. From the RFP analysis of proposals submitted the WDB Youth Lead has determined that proposed amounts meet these requirements.

(a) The WDB will achieve the 75% OSY expenditure rate by sharing the Operational Guidance Letter 03-23 to sub- recipients on allowable uses of funds for outreach activities for federal formula and competitive grant awards. Also, by partnering with agencies that assist out- of- school youth such as attending Juvenile Prevention monthly meetings, presentations at local high schools, attending local job fairs for recruitment through high schools and community colleges, providing advertising materials(pamphlets, brochures) to local agencies and schools. The steps that will be taken to comply with the WDB's programmatic goals and outcomes will be to provide a plan of action to reach the performance goals for the OSY 75% expenditure is to provide a program design that will increase the interest of Out of school youth in our area and for our sub-recipeints to go where our youth are to recruit them.

(b) There is a need to serve additional ISY in the local area region because our location is near two community colleges and many of our youth now are taking college classes and going to early college while they are in high school and so they are already ISY.. So when they finish high school, they are able to take more college classes that will lead to a more higher paying wage such as taking Certified Nursing Assistant through high school and then moving on to Registered Nurse at a community college or a four year college. The WDB will achieve the 25% ISY expenditure rate by conducting presentations to local high schools, recruiting youth through social media because this is a big part of where the youth are at, and providing academic support for in school youth to increase their scores while they are in school, work with several small groups to teach interviewing skills, soft skills, and social skills for the workplace. By personalizing their career journey, the youth will be more engaged in their journey. In addition, offer more pathways and job shadowing to engage youth in pathways in addition to college degrees.

(c) The local area region will be able to meet the demand for youth services by using the wavier because it will help to provide opportunities to innovate and experiment with new approaches to service delivery.

4. How does the Local Area WDB ensure that the minimum of 20% of funds is spent on work experience and is the Local Area WDB expending the 20% minimum on work experience, to include an estimate of expenditures that will be paid wages to youth? If the Local Area WDB has not been meeting the minimum of 20% of funds, please explain additional measures to be taken this year. [WIOA Section 129(c)(4)] (CPS 09-2021, Change 1)

WDB staff determine when negotiating contract amounts and budgets with Youth service providers that the 20% rates are reflected in the budget. When the monthly reimbursements are received, there is a formula built in the Monthly Financial Reimbursement Request spreadsheet that gives a current year-to-date percentage of the allocation to the service providers that are being spent on work experience. The WDB will meet its expenditure requirement to expend at least 20% of funds on WBL opportunities by offering youth year-round paid WEXs and Summer Employment Internships, Job Shadows and On the Job Trainings (OJT) as well as offering incentives for successful completion of these opportunities. The WDB has looked extensively at work experience opportunities and ways to increase expenditure by maximizing the allowed hours per WEX, implementing Job shadowings, increasing OJTs and offering incentives for successful completion and milestone trainings will ensure expending the minimum 20% on work experience. Youth will be able to explore their career options through work experience opportunities while in the program. This will help to create more work-based learning opportunities for youth participants to help service providers spend more of their money on paid work experiences. WIOA funds will be utilized to pay for Participant Wages and Fringes, Employability Skills Training, as well as Staff time and staff wages and fringe expenses while working on these opportunities. The Kerr Tar WDB plans to continue to host Job Fairs for WEX, OJTs and Summer Employment to ensure that the local area will meet the 20% requirement to expend funds on WBL opportunities.

5. Specify if the Local Area WDB plans to offer incentives for (NextGen) youth. If yes, attach the Youth Incentive Policy, if it has been updated since the PY24 Plan submission. The policy should include:

- criteria to be used to award incentives;
- type(s) of incentive awards to be made available;
- whether WIOA funds will be used; and
- the Local Area WDB's internal controls to safeguard cash/gift cards.

- Name document: [Updated or N/A?](#) Local Area WDB Name Youth Incentive Policy.

Note: Federal funds may not be spent on entertainment costs. Youth Incentive Policies should include: compliance with the Cost Principles in 2 CFR part 200; identify types of items that may be awarded (gift cards, plaques, certificates, checks); identify types of achievements/completion of activities (an inclusive list is required); practices for internal controls for safeguarding incentives, and provide a sample list of required documentation for reimbursement (diploma, evaluations).

6. If the Local Area WDB does not offer incentives for (NextGen) youth, please explain why.

N/A

7. Please complete the Youth Program Elements chart provided to demonstrate how the Local Area WDB ensures each of the 14 youth program elements is made available to youth participants. Be certain to complete both columns of the chart to demonstrate partnerships and the potential use of shared funding. Please specify partners. [WIOA Section 129(c)(2)(A)]

- Name document: *Kerr-Tar WDB Youth Program Elements Chart*.

8. Does the Local Area WDB have a standing committee to provide information to assist with planning, operational, and other issues relating to the provision of services to youth? [WIOA Section 107(b)(4)(A)(ii)]

a. If no, describe how oversight to planning, operational, and other issues relating to the provision of services to youth will be provided.

In Planning, the Youth Coordinator assists the Workforce Development Director in the development of Comprehensive State Plan and subsequent annual updates for policies and services to be provided. The Youth Coordinator attends all statewide YouthLeads and NCWorks Superuser meetings to assure that the Local Area remains current on system updates, changes, challenges, and best practices for Youth Programs throughout the State. For technical assistance to the contractors, the Youth Coordinator conducts monthly NCWorks OnLine system reviews both randomly and during the times of invoice receipts to assure compliance with eligibility determination and reporting requirements. Training is provided for Youth Contractors at least quarterly, and any information that is pertinent for Youth Operators are conveyed either via Policy Statement (Local Area) or presented via email or at Career Center weekly On-Staff Meetings. The Youth Coordinator is also a part of the NC Works Career Center Leadership Team in order to assure that Youth Services are in alignment with the local NCWorks Career Center. The employee conducts an Annual Comprehensive monitoring review to assure that all policies, MIS changes, records are in place. In the event of the need of a corrective action, the Youth Coordinator works with the Service Provider in the correction of files, systems, and policies.

b. If yes, please provide a response to the following

- a) Provide the committee's purpose/vision.

N/A

- b) Provide the youth committee's top three goals or objectives for PY 2025.

N/A

[Click here to enter text.](#)

[Click here to enter text.](#)

c) Provide a list of youth committee members to include members' agency/organization, one of which must be a community-based organization with a demonstrated record of success in serving eligible youth. Provide the Committee's Chair information in the first block (*who must be a Local Area WDB member*).

- Name document: N/A

c. Complete the following chart for the PY 2025 Youth Committee's planned meeting schedule to include dates, times, and locations. (Expand form as needed or mark Not Applicable.)

Date	Time	Location (include address and room #)
N/A	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.
Click here to enter text.	Click here to enter text.	Click here to enter text.

VIII. Program Year 2025 Local Area WDB Plan Required Updated Policy Attachments

1. The following policies, **if updated** since the PY24 Plan submission, are *required* to be attached as separate documents in WISE as part of the PY 2025 Local Area Plan. The Local Area Plan is not complete without these documents.

- Name Each Document: Local Area WDB Name, Policy Name.
- In the first column, state if the policy is attached or why it is missing and when it can be expected. If two of the policies have been combined, please make a notation.
- In the second column mark “Yes” **only** if the policy has been revised for the PY 2025 Plan and has not been previously submitted to the DWS Planner.
- Revised policies should be submitted with a highlight or summary of the changes made to the local policy.
- Do not add an empty document in WISE as a “placeholder”.

Required Local Area WDB Policies	New or Revised and needs review (Yes/No)
1. Adult/Dislocated Worker Experience Policy	No
2. Competitive Procurement Policy	No
3. Conflict of Interest Policy	No
4. Nondiscrimination/Equal Opportunity Standards and Complaint Procedures	No
5. Financial Management Policy for Workforce Innovation and Opportunity Act Title I	No
6. Individual Training Account Policy	No
7. On-the-Job Training Policy	No
8. Oversight Monitoring Policy, Tool and Schedule	No
9. Priority of Service Policy	No
10. Youth Work Experience Policy	No
11. Supportive Services Policy	No
12. Local Area WDB WIOA and TAA Co-Enrollment Policy	No
13. Eligible Training Provider Policy	No

Required Local Area WDB Policies	New or Revised and needs review (Yes/No)
14. Non-Criminal Complaint Procedures	Yes - Revised

2. Designate whether the following local *Optional Policies* have been **updated** and are included in the Local Area Plan or write “N/A” implying “Not Applicable” if the Local Area WDB does not have this policy and; therefore, does not use these services.

In the second column mark “Yes” **only** if the policy has been changed for PY 2025 and has not been previously submitted to the DWS Planner.

- Do not add a blank document in WISE as a “placeholder”.
- These policies are required to operate/offer these services.
- If “Yes”, load the policy as a separate document.
- Name document: Local Area WDB Name, Policy Name. (Example: IWT Policy – Yes. Attached as *Board Name IWT Policy*.)

Optional Local Area WDB Policies	Yes - the Local Area WDB has a policy or N/A (Not Applicable)	New or Revised and needs review (Yes or N/A)
1. Local Area WDB Guidance for Local Incumbent Worker Grants	Yes	N/A
2. Local Area WDB Needs-Related Payment Policy	No	N/A
3. Local Area WDB Transitional Jobs Policy	No	N/A
4. Local Area WDB Youth Incentive Policy	Yes	No

3. Individual Training Accounts (ITAs) are required [Regulations Section 680.300] to pay the cost of training provided with Adult and Dislocated Worker funds and limitations on duration and amount may be included [Regulations Section 680.320]. Please provide the following ITA elements in summary:

Individual Training Accounts (ITA) Summary	
Dollar Amounts	\$4,000
Time Limits	2 Years.
Degree or Certificates allowed (Associate, Bachelor’s, other)	Certificates of Completion, Associates Degree, State License and Certification

Individual Training Accounts (ITA) Summary				
Procedures for determining case-by-case exceptions for training that may be allowed		Exceptions are typically reviewed by the WDB Performance and Accountability Coordinator staff or Workforce Development Board Director and approved based on individual need, availability of funds, justification provided in the IEP/ISS, and alignment with in-demand occupations.		
Period for which ITAs are issued (semester, school year, short-term, etc.)		ITAs are generally issued by semester or for the duration of a short-term training program, depending on the training provider's structure and program type. The period for which ITAs may be issued for youth and adult are based on school semester, school year, and short-term structured training. Based on local policy, the maximum period is typically 2 years unless otherwise determined through a special-approval process by appropriate WDB staff.		
Supportive Services covered by ITA (provide examples such as uniforms, tools, physical exams, etc.)		Supportive services may include uniforms, tools, textbooks, physical exams, immunizations, background checks, drug screens, transportation assistance, and testing fees required for training participation or employment. In addition, the Kerr-Tar local area Supportive Service policy allows coverage for youth: housing and child care based on individual need, availability of funds, justification provided in the IEP/ISSP		
Other		N/A		
4. Please specify the supportive services provided by the Local Area WDB Supportive Services Policy. List specific items under Supplies, Emergency, and Other, as identified in the Local Area WDB policy. (Expand form as needed.)				
Transportation	Childcare	Supplies <i>(include examples)</i>	Emergency <i>(include examples)</i>	Other <i>(include examples)</i>
Mileage reimbursement (supporting documentation required for participant in training)	Click here to enter text.	Books (Classroom Textbook or study guide for State License)	Food vouchers to assist with unexpected emergency crisis while in training (Youth Program only)	Technology support and internet support (if for virtual training, may be considered through special WDB approval process)
Gas Cards (Mileage reimbursement primarily used)	Click here to enter text.	Uniforms, scrubs work boots (Work Boots for Construction or Welding training)	Temporary shelter/housing due to crisis (Youth Program only)	

Transportation	Childcare	Supplies (include examples)	Emergency (include examples)	Other (include examples)
before gas cards are considered)				
Bus passes (KARTS van transport system)	Click here to enter text.	Tools necessary for training (Stethoscope for CNA training)	Click here to enter text.	Click here to enter text.
With special Board approval ride share assistance to and from training or work sites		Testing/licensing fees (Training program registration, State Exam for Licensure)		
All transportation supportive services must align with individual needs according to assessments and IEP/ISSP		Background checks, drug screenings (For CDL Training and Allied Health training)		

Note: The Local Area WDB must adequately safeguard all forms of supportive services payments (i.e., gas cards, cash, gift cards, etc.) and assure that they are used solely for authorized purposes. **The Supportive Services Policy must include the Local Area WDB’s internal controls to safeguard supportive services. The internal controls must address the issuance, storage, and reconciliation of supportive services throughout the area and be clearly stated within the policy.**

Attachment Checklist for Local Area Plan Instructions

- ☐ Local Area WDB Signed copy of Updated Consortium Agreement (submit only if have been updated - *(if applicable)*)
- ☐ Local Area WDB Administrative Entity Organizational Chart
- ☐ Local Area WDB Board Members (*form provided*)
- ☐ Local Area WDB By-Laws (submit only if have been updated)
- ☐ Local Area WDB By-Laws Required Elements Crosswalk (submit only if By-Laws have been updated - *form provided*)
- ☐ Local Area WDB Organizational Chart
- ☐ Local Area WDB Administrative Entity Certification Regarding Debarment* (*form provided*)
- ☐ Local Area WDB Workforce Development Area Signatory Form* (*form provided*)
- ☐ Local Area WDB NCWorks Career Centers (*form provided*)
- ☐ Local Area WDB Adult and Dislocated Worker Service Provider (*form provided*)
- ☐ Local Area WDB 14 Youth Program Elements Chart (*form provided*)
- ☐ Local Area WDB Youth Committee Meeting Schedule (*if applicable*)
- ☐ Local Area WDB Youth Committee Members (*if applicable*)
- ☐ Local Area WDB Youth Service Provider (*form provided*)
- ☐ Local Area Memorandum of Understanding
- ☐ Local Area Board Minutes Approving Plan Draft
- ☐ Local Area WDB Youth Service Provider (*form provided*)
- *Only Policies that are new or have been updated since the Program Year 2024 Plan submission should be submitted****
- ☐ Local Area WDB Youth Incentive Policy
- ☐ Local Area WDB Eligible Training Provider Policy
- ☐ Local Area WDB WIOA and TAA Co-enrollment Policy
- ☐ Local Area Adult/Dislocated Worker Work Experience Policy
- ☐ Competitive Procurement Policy
- ☐ Conflict of Interest Policy
- ☐ Nondiscrimination/Equal Opportunity Standards and Complaint Procedures
- ☐ Financial Management Policy for Workforce Innovation and Opportunity Act Title I
- ☐ Local Area WDB Individual Training Account Policy
- ☐ On-the-Job Training Policy
- ☐ Local Area WDB Oversight Monitoring Policy, Tool, and Schedule
- ☐ Priority of Service Policy
- ☐ Youth Work Experience Policy
- ☐ Local Area WDB Supportive Services Policy
- ☐ Local Area WDB Incumbent Worker Training Policy
- ☐ Local Area WDB Needs-Related Policy
- ☐ Non-Criminal Complaint Procedures

☐ Local Area WDB Transitional Jobs Policy

*Mail signed and unfolded originals to assigned DWS Planner at:

N.C. Division of Workforce Solutions
313 Chapanoke Road, Suite 120
4316 Mail Service Center
Raleigh, NC 27699-4316

DocuSign® (or similar) signature pages may be uploaded in WISE.