

<b>EMPLOYMENT AND TRAINING ADMINISTRATION</b> <b>ADVISORY SYSTEM</b> <b>U.S. DEPARTMENT OF LABOR</b> <b>Washington, D.C. 20210</b>	<b>CLASSIFICATION</b> WIOA Performance
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**ADVISORY: TRAINING AND EMPLOYMENT GUIDANCE LETTER NO. 05-18,  
Change 1**

**TO:** STATE AND LOCAL STAKEHOLDERS IN THE WORKFORCE  
INNOVATION AND OPPORTUNITY ACT  
STATE WORKFORCE AGENCIES

**FROM:** LORI FRAZIER BEARDEN   
Acting Assistant Secretary

**SUBJECT:** Workforce Innovation and Opportunity Act Annual Statewide Performance  
Report Narrative

- 1. Purpose.** To provide guidance to Workforce Innovation and Opportunity Act (WIOA) state grantees regarding the content of the WIOA Annual Statewide Performance Report Narrative for Titles I and III and the procedures for submission to the Employment and Training Administration (ETA).

The report is due by the close of business on December 1 for the program year ending June 30 of the same year, or the first business day thereafter should December 1 fall on a weekend.

The change in the ETA guidance aligns the Annual Statewide Performance Narrative requirements with [Workforce Innovation and Opportunity Act Effectiveness in Serving Employers Performance Indicator](#) final rule (89 FR 13814 (Feb. 23, 2024)) (Final Rule) and provides a suggested narrative reporting format for state submissions. Grantees are encouraged to leverage this report to serve legislatures, and other state workforce system stakeholders as appropriate.

- 2. Action Requested.** In compliance with 20 CFR 677 WIOA Title I and III grantees are to submit the annual report narrative in accordance with this guidance. Recipients should distribute this TEGL to those personnel responsible for developing the WIOA Annual Statewide Performance Report Narrative, including personnel responsible for performance reporting.
- 3. Summary and Background.**
  - a. Summary** – This guidance details when and how states submit WIOA Annual Statewide Performance Report Narratives and the content ETA requests in these narratives.

<b>RESCISSIONS</b> TEGL 05-18	<b>EXPIRATION DATE</b> Continuing
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- b. Background – Each state that receives an allotment under WIOA section 127 (Youth), or section 132 (Adult and Dislocated Worker) (for the purposes of this guidance the programs within these two sections will be referred to as Title I), or sections 301-308 (Title III Wagner Peyser Employment Service) must prepare and submit a WIOA Annual Statewide Performance Report Narrative of performance progress to the Secretary of Labor in accordance with the "WIOA Common Performance Reporting - OMB Control No. 1205-0526." The WIOA Annual Statewide Performance Report Narrative serves as a complement to the WIOA Annual Statewide Performance Report (ETA 9169) requirements defined in OMB Control No. 1205-0526 and in Training and Employment Guidance Letter (TEGL) No. 10-16, Change 3, [\*Performance Accountability Guidance for Workforce Innovation and Opportunity Act \(WIOA\) Core Programs\*](#) issued June 11, 2024.

An electronic copy of the WIOA Annual Statewide Performance Report Narrative must be emailed to [WIOA.AR@dol.gov](mailto:WIOA.AR@dol.gov) by the close of business on December 1<sup>st</sup> (or the first business day thereafter should December 1 fall on a weekend) with a courtesy copy emailed to the state's respective ETA Regional Administrator and Federal Project Officer.

#### **4. WIOA Annual Statewide Performance Report Narrative Format and Content.**

The WIOA Annual Statewide Performance Report Narrative provides an opportunity for states to describe progress towards meeting their strategic vision and goals including those described in their current WIOA Unified or Combined Strategic Plan.

##### **a. Format.**

- i. States are not limited to the requested items below and may include additional information about their programs. States have flexibility regarding the contents of the Annual Report Narrative, as long as they address the requested items and stay within the 25-page limit.
- ii. Attachment I includes a suggested report narrative format. States are encouraged to incorporate a table of contents, subject headers in the order of the requested inputs outlined in this guidance, and numbered pages. Tables and Graphics are encouraged. However, state submissions must be 508 compliant which means that WIOA Annual Statewide Performance Report Narratives must be submitted electronically in a machine-readable format to comply with requirements set forth in Section 508 of the Rehabilitation Act, since each state's report will be posted on ETA's Performance website.

For Titles I and III core programs, states must submit an Annual Report Narrative, which must be limited to no more than 25 pages. States are permitted (but not required) to include appendices, such as relevant data tables or state/local area reports, which are not subject to the 25-page limit. The WIOA Common Performance Reporting (OMB Control No. 1205-0526) joint information collection request requires that other core partner programs (WIOA Title II Adult Education and Family Literacy Act and WIOA Title IV Vocational Rehabilitation) assist in the development of the report narrative as appropriate, but these other core programs are not required to submit the narrative described in this guidance.

**b. Content.** In their narratives, states should include the following requested items:

- i. Waivers. Identify each waiver that the state has had in place for at least one program year and provide information regarding the state's progress toward achieving the intended results, goals and performance outcomes in ETA's letter of approval for the waiver (sec 189(i)(3)(C)(ii)) and outlined in the state's waiver request (when applicable). Discuss how activities carried out under each approved waiver have positively or negatively and direct or indirect affected state and local area performance outcomes.
- ii. Evaluations. Include brief descriptions of current or planned evaluation and related research projects, including the following:
  1. Methodologies used;
  2. Efforts to coordinate the development of such projects with WIOA core programs, other state agencies and local boards;
  3. A list of completed evaluation and related reports and links to where they were made accessible to the public electronically;
  4. State efforts to provide data, survey responses, and timely site visits for Federal evaluations;
  5. Any continuous improvement strategies utilizing results from studies and evidence-based practices evaluated; and
  6. Include planned timelines for completion and publication of evaluations as applicable.
- iii. Customer Satisfaction. Describe the state's approach to customer satisfaction, which may include such information used for center certification, in accordance with 20 CFR 678.800. This description should include:
  1. The state's methodologies;
  2. The number of individuals/employers who were provided customer satisfaction outreach, the response rate, and efforts made to improve the response rate;
  3. The results and whether the results are generalizable to the entire population of customers; and
  4. A description of any continuous improvement processes for incorporating the customer satisfaction feedback.
- iv. State Strategies. In the report, states should provide information in the following areas:
  1. Progress made in achieving the state's strategic vision and goals, as described in the state's Unified or Combined State Plan, for developing its workforce and meeting employer needs to support economic growth and economic self-sufficiency;
  2. Progress made in implementing sector strategies and career pathways, business engagement strategies, work-based learning, work

- experiences for youth and adults, transitional jobs, on-the-job training, and incumbent worker training strategies and policies in the state;
3. Efforts to increase access to Registered Apprenticeship Programs (RAPs) including creation of new RAPs and expansion of existing RAPs such as new youth apprenticeship opportunities.
- v. Performance Accountability. The state's performance accountability system, including:
1. Specific state performance measures or goals and progress towards meeting them;
  2. Any performance deficiencies on the primary indicators of performance, which may include descriptions of any factors impacting performance;
  3. The state's common exit policy, as applicable, including which ETA-funded partner programs are included;
  4. Negotiated performance levels for local areas for Title I core programs; and
  5. The state's approach to data validation and ensuring data integrity, including a description of the methodology of any validation activities.
- vi. Statewide Governor's Reserve Funds. Activities funded by statewide Governor's Reserve funds:
1. Activities provided with the funds reserved by the governor, which can be up to 15% <sup>1</sup> of the state's allotment. Describe activities undertaken in whole or in part with the Governor's Reserve and how those activities have directly or indirectly impacted performance;
  2. States may include descriptions of state funded activities or investments in this section.
- vii. Rapid Response. Rapid response activities and layoff aversion, which may include:
1. Data on number of companies served and number of individuals served;
  2. Strategies for linking Rapid Response recipients to American Job Centers and processes for intake or co-enrollment in core and partner programs. Details of specific types of services provided to both companies and affected workers; and
  3. Discussion of layoff aversion strategies, including any metrics/outcomes developed and/or tracked by the state with respect to layoff aversion, such as return on investment or measures showing the economic benefits of Rapid Response and layoff aversion and how layoff aversion activities are aligned with business engagement, sector strategy, and career pathway efforts. States may detail systems, tools, networks or approaches designed to identify companies in distress and

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<sup>1</sup> See WIOA section 128(a)(l).

strategies to deliver necessary solutions as early as possible, as well as outcomes of the use of such systems or tools.

- viii. Wagner-Peyser Act Activities. Activities provided under the Wagner-Peyser Act Employment Service section 7(a) and 7(b) including activities such as providing job search and placement to Unemployment Insurance claimants, administering the work test and making eligibility assessments (e.g. Reemployment Services Eligibility Assessment).
- ix. National Dislocated Worker Grants (NDWGs). NDWGs awarded to or within the state and how those funds are coordinated with state rapid response activities and dislocated worker programs, as well as how the NDWGs fit in with state co-enrollment policies and disaster/emergency management activities, as applicable.
- x. State Best Practices and Needs. This section may address:
  - 1. Challenges the state workforce system faces, which may include policy, implementation, reporting, data analysis, or other relevant challenges, and any assistance needs of the state to address those challenges;
  - 2. Promising practices, lessons learned, and success stories that focus on serving employers, communities, and individuals with barriers to employment, including information based on the state's evaluation and related research projects. This discussion should cover individuals with a barrier to employment as defined in WIOA Section 3(24)<sup>2</sup>, Registered Apprenticeships, or other populations the State may wish to discuss; and
  - 3. Strategies/policies relating to Pay-for-Performance contracting, which may include examples from local areas.

**5. Inquiries.** Please direct inquiries to the appropriate Regional Office.

**6. References.**

- Workforce Innovation and Opportunity Act, Pub. L. 113-128;

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<sup>2</sup> Individual with a Barrier to Employment: (A) Displaced homemakers. (B) Low-income individuals. (C) Indians, Alaska Natives, and Native Hawaiians, as such terms are defined in section 166. (D) Individuals with disabilities, including youth who are individuals with disabilities. (E) Older individuals. (F) Ex-offenders. (G) Homeless individuals (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6))), or homeless children and youths (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))). (H) Youth who are in or have aged out of the foster care system. (I) Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers. (J) Eligible migrant and seasonal farmworkers, as defined in section 167(i). (K) Individuals within 2 years of exhausting lifetime eligibility under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.). (L) Single parents (including single pregnant women). (M) Long-term unemployed individuals. (N) Such other groups as the Governor involved determines to have barriers to employment.

- Joint Rule for Unified and Combined State Plans, Performance Accountability, and the One-Stop System Joint Provisions; [Final Rule \(WIOA Joint Final Rule\) published at 81 FR 55792 \(Aug. 19, 2016\)](#);
- Employment and Training Administration, Workforce Innovation and Opportunity Act [Final Rule \(WIOA DOL Final Rule\) published at 81 FR 56071 \(Aug. 19, 2016\)](#);
- Workforce Innovation and Opportunity Act [Effectiveness in Serving Employers Performance Indicator final rule](#) (89 FR 13814 (Feb. 23, 2024)) (Final Rule)
- Workforce Innovation and Opportunity Act (WIOA) Common Performance Reporting, Annual Statewide Performance Report Narrative, Information Collection Request (ICR) [OMB Control No. 1205-0526](#)
- DOLETA Performance Reporting page: [Reporting Requirements / U.S. Department of Labor](#);
- DOLETA State Plan Resources page: <https://www.dol.gov/agencies/eta/wioa/resources>;
- Required Elements for Submission of the Unified or Combined State Plan and Plan [Modifications under the Workforce Innovation and Opportunity Act, \(OMB Control No. 1205-0522\)](#); and
- [Training and Employment Guidance Letter \(TEGL\) 10-16, Change 3, Performance Accountability Guidance for Workforce Innovation and Opportunity Act \(WIOA\) Core Programs](#) (June 11, 2024).

7. **Attachment(s).**

- Attachment I—Suggested WIOA Annual Statewide Performance Report Narrative format.

## **Suggested WIOA Annual Statewide Performance Report Narrative Format**

The following outline provides a suggested formatting structure for the WIOA Annual Statewide Performance Report Narrative. The optional format includes a table of contents, and topic headers in the order of the guidance to ease review. Limit the body of the narrative to 25 numbered pages. States are encouraged to include 508 compliant tables, charts, and graphics. Attachments are permitted and not included in the 25-page limit.

The Annual Statewide Performance Report Narrative should contain a title page which includes the state name, report title, and date, and a table of contents; inclusion of a linked table of contents aids readers in navigating the state's report. States may also include an introductory letter (optional) from agency or state leadership to introduce the report and highlight specific areas of interest.

### **Waivers**

Identify each waiver that the state has had in place for at least one program year and provide information regarding the state's progress toward achieving the intended results, goals and performance outcomes in ETA's letter of approval for the waiver (sec 189(i)(3)(C)(ii)) and outlined in the state's waiver request (when applicable). Discuss how activities carried out under each approved waiver have directly or indirectly affected state and local area performance outcomes.

### **Evaluations**

Include brief descriptions of current or planned evaluation and related research projects, including the following:

- Methodologies used;
- Efforts to coordinate the development of such projects with WIOA core programs, other state agencies and local boards;
- A list of completed evaluation and related reports and links to where they were made accessible to the public electronically;
- State efforts to provide data, survey responses, and timely site visits for Federal evaluations;
- Any continuous improvement strategies utilizing results from studies and evidence-based practices evaluated; and
- Include planned timelines for completion and publication of evaluations as applicable.

### **Customer Satisfaction**

Describe the state's approach to customer satisfaction, which may include such information used for one-stop center certification, in accordance with 20 CFR 678.800. This description should include:

- The state's methodologies;

- The number of individuals/employers who were provided customer satisfaction outreach, the response rate, and efforts made to improve the response rate;
- The results and whether the results are generalizable to the entire population of customers; and
- A description of any continuous improvement processes for incorporating the customer satisfaction feedback.

## State Strategies

In the report, states should consider providing information in the following areas:

- Progress made in achieving the state's strategic vision and goals, as described in the state's Unified or Combined State Plan, for developing its workforce and meeting employer needs to support economic growth and economic self-sufficiency.
- Progress made in implementing sector strategies and career pathways such as business engagement strategies, work experiences for youth and adults, transitional jobs, and incumbent worker training strategies and policies in the state.
- Efforts to increase access to Registered Apprenticeship Programs (RAP) including creation of new RAPs and expansion of existing RAPs such as new youth apprenticeship opportunities.

## Performance Accountability

The state's performance accountability system, including:

- Specific state performance measures or goals and progress towards meeting them.
- Any performance deficiencies on the primary indicators of performance, which may include descriptions of any factors impacting performance.
- The state's common exit policy, as applicable, including which ETA-funded partner programs are included.
- Negotiated performance levels for local areas for Title I core programs. A suggested table format is below which may be included as an attachment.

Table: Example Negotiated Local Area Performance Levels and Results (e.g. PY 2024)

PY 2024 Local Board Code	Measure	PY 2024 Negotiated Target	PY 2024 Actual Result	PY 2025 (Next PY) Negotiated Target



- The state's approach to data validation and ensuring data integrity, including a description of the methodology of any validation activities

## Statewide Governor's Reserve Funds

Activities provided with the funds reserved by the governor, which can be up to 15% <sup>3</sup> of the state's allotment.

- Describe activities undertaken in whole or in part with the Governor's Reserve and how those activities have directly or indirectly impacted performance.
- States may include descriptions of state funded activities or investments in this section.

## Rapid Response

Rapid response activities and layoff aversion, which may include:

- Data on number of companies served and number of individuals served.
- Strategies for linking Rapid Response recipients to American Job Centers and processes for intake or co-enrollment in core and partner programs. Details of specific types of services provided to both companies and affected workers.
- Discussion of layoff aversion strategies, including any metrics/outcomes developed and/or tracked by the state with respect to layoff aversion, such as return on investment or measures showing the economic benefits of Rapid Response and layoff aversion and how layoff aversion activities are aligned with business engagement, sector strategy, and career pathway efforts. States may detail systems, tools, networks or approaches designed to identify companies in distress and strategies to deliver necessary solutions as early as possible, as well as outcomes of the use of such systems or tools.

## Wagner-Peyser Activities

Activities provided under the Wagner-Peyser Act Employment Service section 7(a) and 7(b) including activities such as providing job search and placement to Unemployment Insurance claimants, administering the work test and making eligibility assessments (e.g. Reemployment Services Eligibility Assessment).

## National Dislocated Worker Grants (NDWGs)

NDWGs awarded to or within the state and how those funds are coordinated with state rapid response activities and dislocated worker programs, as well as how the NDWGs fit in with state co-enrollment policies and disaster/emergency management activities, as applicable.

## State Best Practices and Needs

This section may address:

1. Challenges the state workforce system faces, which may include policy, implementation, reporting, data analysis, or other relevant challenges, and any assistance needs of the state to address those challenges.
2. Promising practices, lessons learned, and success stories that focus on serving employers, communities, and individuals with barriers to employment, including

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<sup>3</sup> See WIOA section 128(a)(I).

- information based on the state's evaluation and related research projects. This discussion should cover individuals with a barrier to employment as defined in WIOA Section 3(24)<sup>4</sup>, Registered Apprenticeships, or other populations the State may wish to discuss.
3. Strategies/policies relating to Pay-for-Performance contracting, which may include examples from local areas.

## Attachments

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<sup>4</sup> Individual with a Barrier to Employment: (A) Displaced homemakers. (B) Low-income individuals. (C) Indians, Alaska Natives, and Native Hawaiians, as such terms are defined in section 166. (D) Individuals with disabilities, including youth who are individuals with disabilities. (E) Older individuals. (F) Ex-offenders. (G) Homeless individuals (as defined in section 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e–2(6))), or homeless children and youths (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a(2))). (H) Youth who are in or have aged out of the foster care system. (I) Individuals who are English language learners, individuals who have low levels of literacy, and individuals facing substantial cultural barriers. (J) Eligible migrant and seasonal farmworkers, as defined in section 167(i). (K) Individuals within 2 years of exhausting lifetime eligibility under part A of title IV of the Social Security Act (42 U.S.C. 601 et seq.). (L) Single parents (including single pregnant women). (M) Long-term unemployed individuals. (N) Such other groups as the Governor involved determines to have barriers to employment.