

What You Need to Know about WIOA Performance Negotiation

Presented by

the Monitoring and Administration Team, DAEL

Hosted by

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Slide 1

Rebecca Moak:

Welcome to the WIOA Technical Assistance webinar on Performance Negotiation. I am Rebecca Moak, Area Coordinator for Region 3, the Midwest.

Joining me for this webinar are DAEL staff: Cheryl Keenan, our director, and Alan Tucker from the Accountability Team, my co-presenters. And providing support are my Monitoring and Administration Team members.

Our topic is one of great concern given the questions we have been asked over the last few months. Our hope is that this webinar will answer your questions regarding the performance negotiation process for PYs 2016-17 and 2017-18.

What to Expect from this Webinar

- Timeline for negotiating performance
- The negotiating process and tool
- What you will need to review to negotiate
- How you will enter your negotiated targets when agreed to in the portal



Slide 2

Rebecca Moak:

Over the past few years we have been negotiating performance targets with the annual extensions. States will be submitting state plans into the portal over the next month. We anticipate the WIOA state plan portal going live in the next week.

Today we will cover the timeline, review the negotiating process and demonstrate a tool that states will be able to use to calculate their measurable skill gain target.

Appendix 1 requires AEFLA grantees to submit expected levels of performance for the Measurable Skill Gains indicator only.

We will talk about the materials that you will need to review in establishing your proposed targets.

Finally, we will discuss entering the MSG targets into the portal.

WIOA Timeline: Key Dates

3/3/16: Statutory deadline for submitting state plans

3/8/16: Statistical Adjustment Model guidance webinar

3/24/16: Integrated English literacy and Civics Education
guidance webinar

4/1/16: Last day state plan submissions considered timely
(under WIOA Transition Authority)

4/21/16: Sub-recipient Monitoring guidance webinar

TBD: Procurement and Competitions webinar

Slide 3

Rebecca Moak:

The statutory deadline to submit state plans is today, March 3. However, State plans submitted by April 1 will be considered “on time,” under WIOA Transition Authority.

Key dates on this slide include a series of technical assistance webinars we are hosting in March and April. The procurement and competitions webinar will be held after the publication of the final rule.

I am going to turn the presentation over to **Chery Keenan** who will give us the overview of the Performance Indicators.

WIOA Required Performance Indicators

1. Employment, Second Quarter after Exit
2. Employment, Fourth Quarter after Exit
3. Median Earnings, Second Quarter After Exit
4. Credential Attainment Rate
5. **Measurable Skill Gains (MSG)**
6. Effectiveness in Serving Employers



The only Title II performance indicator for which expected levels of performance are required in Appendix 1 is the **Measurable Skill Gains** indicator. Title II grantees already collect the data for this measure.

Slide 4

Cheryl Keenan:

These are the required WIOA performance indicators for all core partners as required by statute in Sec 116 of WIOA. Each federal office is working with its grantees on collecting and reporting on the core indicators. **WIOA sec. 116 (b)(2)(A)**

For the first two-year period of the state plan, certain indicators are considered “baseline” for Title II. We will review what “baseline” means in the next slide.

The only indicator that we are negotiating this spring is MEASURABLE SKILL GAINS. This is a new indicator for Adult Education under WIOA. Adult Education has collected data for educational gain under WIA through the NRS Educational Functioning Levels (EFLs) and these data are what you will use to calculate your targets for MSG. This is the one indicator you will propose targets for in the state plan on Appendix 1.

Performance Goals: Baseline Indicators

- Baseline indicators are those for which a state is not likely to have adequate data on which to make a reasonable determination of an expected level of performance.
- Baseline indicator expected levels of performance will not be negotiated with Departments.
- Baseline indicator data will not be used for end-of-year performance calculations.
- States must collect performance data for all indicators, including baseline indicators, beginning on July 1, 2016.



Slide 5

Cheryl Keenan:

- “Baseline” indicators are those for which a state is not likely to have adequate data on which to make a reasonable determination of an expected level of performance.
- Baseline indicator expected levels of performance will not be negotiated with Departments this year.
- Baseline indicator data will not be used for end-of-year performance calculations.
- States **must collect** performance data for all indicators, including baseline indicators, beginning on July 1, 2016.

Baseline Indicators, continued

Adult Education data collected during the first two years of the plan for the following indicators will serve as a baseline for future years:

1. Employment in the 2nd quarter
2. Employment in the 4th quarter
3. Median Earnings
4. Credential Attainment



Slide 6

Cheryl Keenan:

How did we determine which indicators would be baseline indicators? We selected indicators that we know States will not have data on which to set expected levels of performance. Some of these indicators are new under WIOA, such as the earnings indicator. Other indicators have changed under WIOA, such as the percentage of participants who are employed in the 2nd and 4th quarters. These are the four baseline indicators for adult education.

The data you collect for these four indicators during years 1 and 2 of the plan (PY 2016-17 and PY 2017-18) will be your baseline for setting targets in future years.

The final rule will contain additional information on how the sixth indicator—effectiveness in serving employers—will be implemented.

Performance Goals (Appendix 1)

- Plan Requirement: Include goals for primary indicators of performance for the first two years of the plan.
- Departments and States will negotiate expected levels of performance for each core program.
- **Title II requires expected levels of performance for Measurable Skill Gains (MSG) only**



Slide 7

Cheryl Keenan:

From the Final State Plan Information Collection Request (ICR), you are required as a State to enter data into Appendix 1 in the portal.

- Plan Requirement: Include goals for primary indicators of performance for the first two years of the plan.
- Federal Agencies and States will negotiate expected levels of performance for each core program.
- **Title II requires expected levels of performance for Measurable Skill Gains (MSG) only for this spring's negotiation process.**

Performance Negotiation

Program Years 2016-17 and 2017-18

- No final rules published
- No final information collection published
- No statistical adjustment model in place



Slide 8

Cheryl Keenan:

Before we talk about the Measurable Skills Gain indicator, it is important to acknowledge a few facts that will make this year's negotiations somewhat "unordinary."

First, we have not yet published our final rules that will define measurable skills gain.

Second, we have not yet published a final information collection that provides more detail on collection elements within the MSG indicator.

Third, we have not finished our work on the required statistical adjustment model to assist in the performance target process.

It is important to understand that for this first two-year period, the Departments will not apply the sanction provisions in the law.

In some ways, the target-setting process this spring is an opportunity to practice target-setting under a new statute, since the targets will not yet result in calculations that will trigger sanctions. They also will not result in calculations for incentive awards as they have in the past under WIA.

Please keep these factors in mind in establishing the expected levels of performance targets.

- WIOA does not have incentive awards.
- Sanctions do not start until we have data on all indicators.
- As in the past with performance targets, you are required to demonstrate continuous improvement.

WIOA does not change Adult Education's core mission of providing educational services to eligible adults.

Measurable Skill Gains Indicator

As proposed in the NPRM [§ 463.155 (v)]

The percentage of participants who during a program year, are in an education or training program that leads to a recognized post-secondary credential or employment and who are achieving measurable skill gains, defined as documented academic, technical, occupational or other forms of progress, towards such a credential or employment.



Slide 9

Cheryl Keenan:

The proposed rule that the Departments published in July 2015 provided our best thinking at that time on Measurable Skill Gains. We also provided more information in the preamble and requested comment on the proposal. We received and are considering many comments through the NPRM. The definition of MSG will be published in the final rule.

Section 463.155 (v) in the proposed rule states: **The percentage of participants who, during a program year, are in an education or training program that leads to a recognized post-secondary credential or employment and who are achieving measurable skill gains, defined as documented academic, technical, occupational or other forms of progress, towards such a credential or employment.**

Measurable Skill Gains Indicator

As proposed in Joint Performance Information Collection Request (ICR) – Five types of gain are defined:

- 1. Educational Achievement/Educational Functioning Level**
2. High School Diploma or Equivalent
3. Secondary/Post-secondary transcript/report card
4. Training Milestone
5. Skills Progression

Slide 10

Cheryl Keenan:

In the fall, we published an information collection request that provided further detail on our proposal for required elements of the MSG indicator. It included a list of five types of gain that can be used to register a success on the MSG indicator.

The final information collection will include the types of gain that will count towards the MSG. Each federal core program office will select which types of gain will be used for its respective program. Title II will use only the first type of gain—educational achievement—to measure success on the MSG indicator.

The final definition of Measurable Skill Gains and educational achievement/Educational Functioning Level will be published in the final rule. We are not able to enforce any proposal made in the proposed rule or proposed ICR. We are, however, basing our performance target negotiations on the data available on Educational Functioning Level gain.

The actual performance data that States submit in October 2017 will be based on the final definitions of indicators as published through the rule-making process and associated information collections. We understand that there may be differences in what we know today through the proposed rule and information collection and what may be published in final form. There will not be consequences to States because of these differences.

In the spring of 2018, States are required to submit expected levels of performance for PY 2018-19 and PY 2019-2020. We will have final definitions in place and actual data available on the indicators that will be used in the target-setting process.

Your take-away today should be: **For the 2016 Performance Negotiation process, we are negotiating Measurable Skill Gains (MSG) as defined by Educational Achievement. Educational Achievement is based on Educational Functioning Levels.**

Negotiating Factors

- √ 1. Promote Continuous Improvement
- X 2. Statistical Adjustment Model (SAM)
- √ 3. GPRA targets
- √ 4. How you compare to other states

WIOA §116 (b)(3)(A)(v)



Slide 11

Cheryl Keenan:

The statute requires consideration of these four negotiating factors:

1. Promote Continuous Improvement
2. Statistical Adjustment Model (SAM)
3. GPRA targets
4. How you compare to other states.

In this year's negotiation process, we are considering three of the four factors: continuous improvement, alignment with GPRA targets, and how you compare to other states,

We are **not** using the Statistical Adjustment Model until we have enough data to populate the model. Next Tuesday, March 8th at 2 pm ET, AIR is hosting a webinar to explain in layman language the Statistical Adjustment Model. If you have not registered for this, we encourage you to do so.

According to WIOA Section 116 (b)(3)(A)(v):

(v) FACTORS.—In reaching the agreements described in clause (iv), the State and Secretaries shall—

(I) take into account how the levels involved compare with the State adjusted levels of performance established for other States;

(II) ensure that the levels involved are adjusted, using the objective statistical model established by the Secretaries pursuant to clause (viii), based on—

(aa) the differences among States in actual economic conditions (including differences in unemployment rates and job losses or gains in particular industries); and

(bb) the characteristics of participants when the participants entered the program involved, including indicators of poor work history, lack of work experience, lack of educational or occupational skills attainment, dislocation from high-wage and high-benefit employment, low levels of literacy or English proficiency, disability status, homelessness, ex offender status, and welfare dependency;

(III) take into account the extent to which the levels involved promote continuous improvement in performance accountability on the performance accountability measures by such State and ensure optimal return on the investment of Federal funds; and

(IV) take into account the extent to which the levels involved will assist the State in meeting the goals described in clause (vi).

The Government Performance and Results Act of 1993 (GPRA)



One goal of GPRA is to *improve congressional decision making by providing more objective information on achieving statutory objectives, and on the relative effectiveness and efficiency of Federal programs and spending* [Sec. 2(b)(5)].



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Cheryl Keenan:

The Government Performance and Results Act (GPRA) requires us to set annual performance measures. GPRA Measure Requirements are quantitative, objective, and measurable.

We are required to submit an annual performance plan and an annual performance report to Congress so that they can make funding decisions. All formula grant programs must submit targets and performance results. Your data are the performance results.

Shortly, we will share with you OCTAE's GPRA's Targets for Measurable Skill Gains.

Performance Negotiation

- **Who** – All States and Outlying Areas
- **What**– Measurable Skill Gains (MSG) – All other indicators are baseline
- **When** – Beginning March 2016 – After a State has submitted their State Plan in the portal
- **How** – E-mail and conference call with your area coordinator. You will receive an Excel workbook that will have negotiation worksheets for each state and outlying area and a negotiation guidance document.



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Rebecca Moak:

Thank you for the overview, Cheryl. If you have questions, please submit them in the Q&A and we will answer them at the end of the webinar.

AEFLA grantees have annually negotiated targets for WIA since 2006. So this is not a new process, but there are changes for WIOA.

For the first two program years of WIOA implementation we will only negotiate one measure: Measurable Skill Gains, also known as MSG.

You will gather data on the other required measures starting July 1, 2016, but we will not negotiate on those until March 2018 for the Program Years 2018-19 and 2019-20.

As part of the state plan submission, states are required to put in a proposed target for Measurable Skill Gains for Title II—AEFLA.

As soon as your state has submitted your state plan into the state plan portal, Area Coordinators will start the negotiation process for Measurable Skill Gains. The process will be similar to past negotiations through e-mail and conference calls.

Guidelines for Setting Levels of Performance

- States that are ranked in the bottom half of Quartile 1 are encouraged to propose targets that will move them into Quartile 2.
- States that are ranked in the top half of Quartile 1 are encouraged to propose targets that will move them into the bottom of the banded section.
- States that are in Quartile 2 and below the bottom band are encouraged to propose targets that will move them into the banded area.
- States that are in the banded area and below the median are encouraged to propose targets to reach the median.
- States that are in Quartiles 3 and 4 are encouraged to propose targets that show continuous improvement.

Slide 14

Rebecca Moak:

The Measurable Skill Gains Target Worksheet tool includes a tab that ranks all states by quartile. Shortly, we will show a screen shot of the tab and Alan Tucker will demonstrate it in the tool.



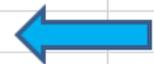
Workforce Innovation and Opportunity Act

Measurable Skill Gains

Target Worksheet

Test State

Program Type	2014-2015 State Enrollment	2014-2015 % of State Total Enrollment
Adult Basic Education (ABE + ASE)	13,800	84%
English as a Second Language (ESL)	2,288	14%
Total	16,349	100%



Click Here to select grantee name to autopopulate data fields.

Test State 2014-2015 Performance Outcomes					Target Worksheet	
Entering Educational Functioning Level	Total Number Enrolled	Number Completed Level	% Completing Level	2014-2015 National Median	2016-2017 Proposed Individual Targets	2017-2018 Proposed Individual Targets
ABE Beginning Literacy	288	125	43%	43%	48%	50%
ABE Beginning Basic Education	2,302	942	41%	42%	46%	48%
ABE Intermediate Low	5,342	2,037	38%	39%	43%	45%
ABE Intermediate High	5,843	2,041	35%	33%	40%	43%
ASE Low	25	21	84%	39%	89%	90%
ESL Beginning Literacy	126	50	40%	42%	45%	48%
ESL Beginning Low	563	281	50%	51%	55%	58%
ESL Beginning High	233	54	23%	50%	28%	32%
ESL Intermediate Low	464	91	20%	44%	25%	28%
ESL Intermediate High	427	88	21%	41%	26%	30%
ESL Advanced	475	35	7%	24%	16%	20%
Total	16,349	5,892	36%	40%	-----	-----



Set the individual EFL targets for the 2016-2017 and 2017-2018 PY's.



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Rebecca Moak:

Before Alan demonstrates the workbook, I am going to share three screenshots that are of great significance in your process.

The first is a screenshot of the Measurable Skill Gains Target Worksheet. I am going to review this with you, then Alan Tucker will demonstrate how the worksheet calculates Measurable Skill Gains.

When you open the worksheet, you will see the blue bar. The drop-down menu is to the right of the box. You will choose your State, and the sheet will populate from current NRS State data.

Let's look at the first box: Program type. In the second column you will see that Adult Basic Education and Adult Secondary Education enrollment are collapsed into one number. The 13,800 represents the enrollment in these two programs. English as a Second Language's (ESL) enrollment is 2,288. The Test State's total enrollment is 16,349.

The next column calculates the percentage of the program type. For ABE/ASE that is 84% and for ESL it is 14%.

The Measurable Skill Gains are calculated from the Educational Functioning Levels (EFLs). So, even though we are not negotiating each level as in the past, the proposed individual targets are used in the calculation of Measurable Skill Gains.

As the purple box indicates, you will set the individual EFL targets for PYs 2016-17 and 2017-18. You will only complete the white cells in this worksheet. The other cells are locked.

It is important to remember that we will review your past performance in the negotiation process. You should use the Performance History reports to help you determine each proposed EFL target.

Once you have put in your proposed targets, you will need to save your worksheet. Since the Area Coordinators will be receiving multiple worksheets, I suggest that you use SAVE AS and name your worksheet as follows: [State Abbreviation] WIOA MSG Target Worksheet.xlsx. That is, IL WIOA MSG Target Worksheet.xlsx.

GPR and MSG

Program Type	2014-2015 State EFL Completion	2014-2015 National Median	2016-2017			2017-2018		
			GPR Target	MSG Target %	MSG Target #	GPR Target	MSG Target %	MSG Target #
Adult Basic Education (ABE + ASE)	37%	38%	46%	42%	5854	47%	45%	6188
English as a Second Language (ESL)	26%	42%	49%	32%	735	50%	36%	815
OVERALL MSG	36%	41%	41%	41%	6588	44%	44%	7002

Overall Targets are calculated automatically based on the proposed individual targets set in the worksheet above.

Slide 16

Rebecca Moak:

The second screenshot is the lower part of the worksheet.

When you have put in the proposed targets for each of the EFLs, the proposed MSG is calculated. On the worksheet this will be easier to see, since this is on one page. This matrix includes the 2014-15 Completion Rate for ABE/ASE and ESL, the national median, **OCTAE's GPRA target**, your MSG proposed targets, and your MSG students

The blue arrows point to the GPRA targets. As you see from these cells, the GPRA targets are ABE/ASE combined and ESL. This is the reason the spreadsheets have been set up like this.

The GPRA Targets for PY 2016-17 are 46% for ABE/ASE and 49% for ESL. For PY 2017-18, ABE/ASE is 47% and ESL is 50%.

Before exiting the worksheet, remember to save it.

The purple box represents the banding, $\pm 5\%$ from the median

	Grantee	ABE + ASEL	Grantee	ESL	Grantee	Overall EFL Progres	
1	MO	64.89%	AS	79.86%	AS	80.47%	4th Quartile
2	OH	63.97%	PR	75.11%	MO	65.54%	3rd Quartile
3	WY	58.84%	MO	67.37%	OH	62.94%	2nd Quartile
4	NY	56.18%	NY	64.59%	NY	61.10%	1st Quartile
5	PV	53.85%	WY	63.81%	WY	59.03%	
6	DE	52.49%	KS	62.47%	PR	56.98%	
7	KY	51.26%	AZ	61.36%	AZ	54.84%	
8	TX	51.01%	OH	59.69%	KS	54.38%	
9	AZ	50.48%	MT	58.71%	DE	54.23%	
10	GA	49.37%	DE	57.82%	PV	53.85%	
11	RI	49.12%	GU	55.93%	TX	52.82%	
12	IN	48.71%	TX	54.72%	KY	51.81%	
13	KS	48.11%	KY	54.66%	GA	50.34%	
14	PR	47.61%	GA	53.61%	IN	48.60%	
15	LA	47.11%	MI	50.21%	RI	46.77%	
16	MS	44.23%	VI	49.27%	LA	45.11%	
17	WY	43.83%	ND	48.20%	MS	43.86%	
18	MN	43.80%	IN	48.15%	CA	43.71%	
19	IA	43.06%	CA	47.80%	IA	43.53%	
#	AR	42.69%	NJ	46.21%	NJ	43.23%	
21	ID	40.86%	ID	46.13%	ID	42.83%	
#	OK	40.60%	PA	46.12%	MN	42.52%	
#	NJ	39.37%	MA	46.08%	VI	42.35%	
#	IL	39.27%	RI	45.12%	CT	42.03%	
#	PA	39.17%	CT	44.50%	WY	41.81%	
#	SC	38.92%	IA	44.19%	ND	41.50%	
#	VI	38.83%	SD	43.90%	PA	41.47%	
#	NH	37.88%	VA	42.49%	AR	41.46%	
#	ND	37.61%	NY	42.42%	IL	40.66%	
#	VA	37.56%	AL	42.41%	NY	40.54%	
31	AL	37.51%	VA	42.31%	VA	40.32%	
#	CT	37.44%	IL	41.63%	SC	39.07%	
#	FL	36.18%	MN	41.21%	MA	38.28%	
#	CA	36.11%	SC	39.75%	OK	38.26%	
#	GU	35.39%	DC	38.72%	AL	38.08%	
#	NY	34.87%	MD	38.64%	GU	37.83%	
#	SD	34.49%	OR	38.44%	SD	37.75%	
#	TN	33.12%	WY	37.76%	MI	37.33%	
#	DC	33.07%	AR	37.58%	NH	36.06%	
#	NE	33.00%	NH	34.57%	DC	35.69%	
41	UT	32.12%	NE	33.04%	MT	34.29%	
#	MT	32.10%	OK	32.87%	VA	34.23%	
#	CO	31.65%	ME	32.76%	MD	33.19%	
#	MI	31.23%	LA	32.35%	FL	33.12%	
#	NC	31.17%	NC	31.39%	NE	33.02%	
#	NM	31.02%	UT	30.84%	TN	32.30%	
#	MP	29.53%	FL	30.35%	OR	32.16%	
#	HI	27.81%	TN	29.28%	UT	31.71%	
#	MD	27.37%	CO	28.82%	NC	31.24%	
#	OR	27.32%	MS	27.90%	CO	30.01%	
51	YT	26.93%	NM	27.11%	NM	29.50%	
#	ME	25.46%	AK	23.46%	MP	27.70%	
#	VA	24.97%	HI	17.72%	ME	27.65%	
#	MA	24.43%	YT	11.05%	HI	24.55%	
#	AK	20.76%	MP	10.00%	VT	22.71%	

The purple box represents the banding, $\pm 5\%$ from the median.

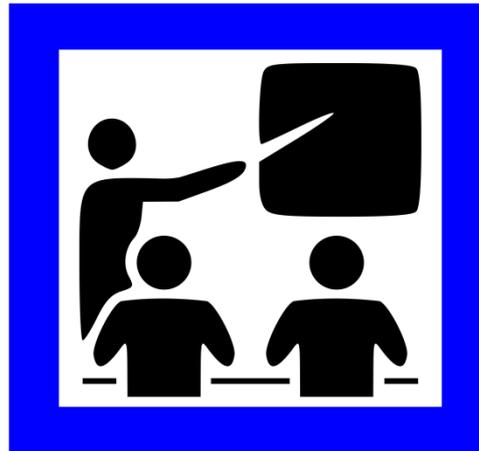
Slide 17

Rebecca Moak:

The third and final screenshot is the tab that shows the banding. This is the tab labeled 14-15 Combined Quartile Rank. This will be a reference point as you develop your proposed Measureable Skill Gains expected level of performance.

A memo along with the workbook will be sent to you shortly and will contain detailed information regarding the use of banding in setting your proposed target.

Negotiation Tool Demonstration



Slide 18

Rebecca Moak:

I will now turn it over to **Alan Tucker** to demonstrate and explain the tool that was developed to help you establish Measurable Skill Gains targets.

Alan Tucker:

Walk-through for State WIOA Target Worksheet

As you open the worksheet you will see the first page has several boxes intended to help guide you through the process. In the blue area you will see the state abbreviations in a drop-down list. Click the arrow beside the blue box to open up the drop-down list.

Select your state from the list and all of the data fields in grey will be automatically populated with 2014-2015 data. The data pulls from the various tabs in the workbook.

Individual State Tabs

You can click on your State tab to double check the data, and if there are any issues then please let us know immediately. Your State data tab along with the three quartile tabs will aid you and your Area Coordinator in the target-setting process.

Clicking on the State tabs will show 2013-2014 and 2014-2015 data based on the NRS Table 4 from those program years.

All of the worksheets have been locked to avoid any accidental changes being made.

14-15 Combined Quartile Rank Tab

The three tabs highlighted in gold are used to show Quartile Rankings.

The “14-15 Combined Quartile Rank” tab shows the various EFL Progression percentages used in the worksheet.

You can see the various coloring designations for each quartile to the right of the lists. Gold is the top quartile 4, green is Quartile 3, yellow is Quartile 2, and red is Quartile 1.

The first group of data shows the ABE + ASE Low combined EFL progression. The second group of data is the ESL EFL progression. And the final group shows the overall EFL progression for 2014-2015. Each of these figures was used to generate the median national values used on the worksheet.

The purple box that you see represents a banding that is + or - 5% from the median outcome for each area. This will be used to help negotiate the overall targets similar to how it was used last year.

(sort) 14-15 Combined Quartile Rank Tab

The second gold tab “(sort) 14-15 Combined Quartiles” shows the same data as the 14-15 Combined Quartile Rank tab, but it allows you to sort the data in the various groups.

(sort) 14-15 Outcomes by EFL

This tab shows the national figures for each EFL outcome in 2014-2015. The tab allows the user to sort by EFL or by grantee name in order to review the individual EFL outcomes in 2014-2015.

Primary Worksheet

The data from the various worksheets all filter into the primary worksheet to give the user an understanding of the national outcome rates and the grantee's past performance.

The first section of the target worksheet shows the population breakdown from 2014-2015 by breaking out ABE and ASE population from the ESL population.

The second section of the worksheet shows the data from the 2014-2015 NRS Table 4 as a reminder of past performance.

The user will see the total number of students enrolled, number completing an EFL, EFL completion %, and the national EFL completion median % for each EFL.

Beside the National Median column are columns with white cells titled "2016-2017 Proposed Individual Targets" and "2017-2018 Proposed Individual Targets."

Along with guidance from your Area Coordinator, choose the individual target % for each EFL for the next two program years and fill in the individual targets.

The target percentages are then fed into the final section to establish the final overall Measurable Skill Gains targets for 2016-2017 and 2017-2018.

There will be a target set for Adult Basic Education (ABE + ASE), ESL, and then an overall MSG goal. Each of these values is based on the 2014-2015 population characteristics of the grantee. For example, for our Test State there are only 288 students in ABE Beginning Literacy so the target percentage chosen for that EFL will have slightly less impact on the overall total than the target from ABE Intermediate High, which had a population of 5,843. This was put in place to ensure consistency for all States regardless of the population characteristics for individual EFLs.

The worksheet also establishes a target number of students for each final target area based on the final target percentages.

The process remains very similar to past years, but the worksheet has changed.

Performance Negotiation Preparation

- ✓ Review spreadsheet and negotiation guidance document.
- ✓ Review your Performance History in NRS database.
- ✓ Complete the worksheet tool using proposed targets for each of the Educational Functioning Levels (EFLs).
- ✓ Save the spreadsheet as **[State 2 LETTER ID]WIOA MSG Worksheet.xlsx**.
- ✓ E-mail worksheet to your area coordinator.
- ✓ Your area coordinator will set up a conference call to negotiate the proposed Measurable Skill Gains targets.



Slide 19

Rebecca Moak:

Thank you, Alan.

In the next few days you will receive an e-mail from your Area Coordinator. The e-mail will include the Performance Negotiation Guidance document and the MSG Excel Workbook that Alan just demonstrated.

In preparation for the negotiation process with your Area Coordinator, please follow these tips.

- Open and review the guidance and the MSG spreadsheet with the supplemental worksheets.
- Go into the NRS and review the History Worksheets.

Your Area Coordinator will be reviewing these documents in preparation for the conference call.

If you have any questions about the preparation, please contact your Area Coordinator for assistance. We are here to help you.

Performance Negotiation

After agreement has been reached on the expected levels of performance:

- ✓ Enter the agreed to targets into the online state plan portal.
- ✓ OCTAE's Assistant Secretary makes the final approval of your targets.



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Rebecca Moak:

After the Area Coordinator has talked with the Adult Education State Director about the State's proposed targets, she will share the proposed MSG targets with our director, Cheryl Keenan, for agreement.

Once we have reached agreement, you will be notified to enter the "agreed to" MSG targets into the portal.

Final approval of the targets is the responsibility of OCTAE's Assistant Secretary.

I hope this process feels very familiar to you. The MAT team is here to support you and help answer your questions.

Coming Soon: Technical Assistance Webinars

Mark your calendars!

- Statistical Adjustment Model, March 8, 2016
- Integrated English Literacy and Civics Education - March 24, 2016
- Sub-recipient Monitoring - April 21, 2016
- Procurement and Competitions - TBD

All webinars will begin at 2:00 pm ET



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Rebecca Moak:

Please mark your calendars for the upcoming technical assistance webinars. You will receive an invitation and link to each webinar the week of the webinar. The e-mail will come from gov.delivery and your Area Coordinator.

The Statistical Adjustment Model webinar is provided by the American Institutes of Research. You will need to register for that webinar in advance. Please let us know if you need the link.

The Procurement and Competitions technical assistance webinar will be scheduled after Final Rule publication. This is a change in the schedule.

These webinars are coming up quickly. The information shared may be useful during the revision process, if any changes are necessary. So mark your calendars.

Technical Assistance Contacts

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Area Coordinators

- Teresa Bestor, Area I, 202-245-6402, Teresa.Bestor@ed.gov
- Sharon Harrington, Area II, 202-245-7709, Sharon.Lankford@ed.gov
- Rebecca Moak, Area III, 202-245-7807, Rebecca.Moak@ed.gov
- Zina Watkins, Areas IV and V, 202-245-6197, Zina.Watkins@ed.gov

State Plan Submission Access

- Kenneth Kalman, 202-245-7529, Kenneth.Kalman@ed.gov

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Rebecca Moak:

You can also contact your Area Coordinator for technical assistance. Kenny Kalman will be processing your requests for access to the State plan portal.

Thank you for your attention.

This ends our presentation of **What You Need to Know about WIOA Performance Negotiation.**