

Governor's Workforce Investment Division Policy No. 23-03

SUBJECT: Quarterly Reporting Requirement (Budget & Participant Service Level)

EFFECTIVE: February 1, 2003

Purpose: To set forth policy and instructions for all Local Workforce Investment Boards (LWIBs) regarding the submission of quarterly reports based on the "Budget Information Summary" (BIS) and "WIA Program Planning Summary" (PPS) that are required under Governor's Workforce Investment Division Policy No. 20-01.

Reference: Governor's Workforce Investment Division Policy No. 20-01 and references contained therein.

Background: Governor's Workforce Investment Division Policy No. 20-01 establishes the process for submission of BIS and PPS information as inclusions with Local Workforce Investment Plans (LWIPs) or modifications. Policy No. 20-01 remains in full effect. This addendum merely sets forth requirements in addition to those contained in the original Policy No. 20-01.

In order to meet the goals of continuous improvement of state and local workforce investment activities funded under the Workforce Investment Act, as well as the optimization of return on investment from such activities, reporting is required concerning the estimates provided in the BIS and PPS as part of the local planning process. The additional information reported will provide the Governor's Workforce Investment Division and other appropriate state level entities with information necessary for the assessment of progress by Local Workforce Investment Boards (LWIBs) toward meeting locally established planning estimates, evaluation of the need for technical assistance and/or other state action, and evaluation of the overall effectiveness of Workforce Investment Act programs in the state. The information collected will also provide estimate data on future performance goals and objectives that can be furnished to the United States Department of Labor, the WV Workforce Investment Council, appropriate legislative bodies, and other entities as necessary.

Policy: All LWIBs will be required to submit the attached documents on a quarterly basis.

The "WIA QUARTERLY SUMMARY BUDGET REPORT (CUMULATIVE)" must be prepared for each Title I WIA program (i.e. in and out-of-school youth, adults, and dislocated workers). The report will

reflect progress toward projected quarterly obligations and expenditures, as well as providing an opportunity to detail reasons for exceeding, meeting, or lagging behind such estimates. The report form is attached.

The “WIA QUARTERLY REGISTRANT PROGRESS REPORT (CUMULATIVE)” will reflect progress toward quarterly estimates of the number of WIA participants served who count toward negotiated performance indicators, as well as providing an opportunity to detail reasons for exceeding, meeting, or lagging behind such estimates. The report form is attached.

Action: All LWIBs will prepare and submit to the Director of the Governor’s Workforce Investment Division both of the above-referenced Quarterly Reports for each quarter of the program year, effective with the quarter ending March 31, 2003. The above-referenced Quarterly Reports shall be considered due at the same time as the quarterly fiscal reports submitted to this office by the LWIBs (said financial reports currently being the “Cumulative Report of Expenditures and Obligations” and “Financial Status Report – Workforce Investment Act Local Administration”).

This policy should be placed in the binder or other filing mechanism used to maintain an updated collection of state policy issuances.

Questions: Contact the Governor’s Workforce Investment Division, 1900 Kanawha Blvd. East, Building 6, Room B-617, Charleston WV 25305. Toll free telephone number is: 1-877-967-5498

Expiration: Effective until modified or rescinded by the West Virginia Workforce Investment Council.