

## Appendix B: Regional Plan Instructions

WIOA requires a broad strategic approach to planning focused on the overarching vision, goals, alignment and shared responsibilities within a designated region. *Planning regions* are required to provide a regional plan that incorporates each prompt listed in this appendix.

Regional plans are broader in scope than the plan developed for the respective local area(s) within a planning region. Regional plan drafters are encouraged to include data samples, streamlined graphics and tables to support any narrative instead of large volumes of data, tables and graphs.

The Pennsylvania Department of Labor & Industry, or L&I, includes a sub-section labeled “*Expectation*” for most prompts. This sub-section provides planners with practical concepts for developing narrative and creating a basis for discussion. Concepts are not all-inclusive but provide a foundation for building narrative. L&I will use each prompt’s general contextual meaning and *expectation* to evaluate narrative when reviewing each submitted regional plan.

**Note:** The local board must cite the source(s) used to collect all or part of the regional labor market data (e.g., Center for Workforce Information and Analysis, or CWIA).

### 1.1. Identification of the region.

**Factors being considered include, but are not limited to:**

- A reference name for the region;
- Identification of the LWDA(s) that comprise the region;
- Identification of the key region committee members charged with drafting the regional plan to include organizational affiliation;
- A list of key region committee meeting dates; and
- The regional plan’s effective date.

(Revised) **Note:** When adding the initial reference of the local workforce development board into plan narrative, the legal name must be used at least once, before adding an alternative Doing Business As, or D.B.A., moniker.

### 1.2. Based on the analysis of the regional labor market and economic conditions, describe the region’s workforce and economic development-oriented vision and goals. [WIOA Sec. 106(c)(1)(D); 20 CFR 679.510(a)(1)(vii)]

**Expectation:** The narrative must include a description of the region’s vision and a set of goals that are cognizant of the regional economic conditions labor market data and are in alignment with the state plan.

**Factors being considered include, but are not limited to:**

- How the strategic goals consider both workforce and economic development priorities within the region;
- How the local board will expand the use of apprenticeships as part of the local board’s business/employer engagement strategy;
- How the local board will demonstrate Engage! linkage between workforce and economic development throughout the LWDA;
- How the local board will work with local economic development organizations to achieve the strategic goals; and
- How the coordination of services with regional economic development services and providers will occur.

### 1.3. Describe the collection and analysis of regional labor market data (in conjunction with the Commonwealth). [WIOA Sec. 106(c)(1)(D); 20 CFR 679.510(a)(1)(iv); 20 CFR 679.560(a)(1)(i) and (ii)]

**Expectation:** Regional planner(s) must describe and analyze regional labor market data to articulate the region’s economic conditions and employers’ employment needs.

**Factors being considered include, but are not limited to:**

- Describing the state of the regional economy and key positive and negative economic conditions (e.g., on-going business cycle impact, business community vitality, unemployment trends; demographic information; key legal-political-social conditions; technological changes; natural forces);
- Identifying key industry cluster(s);
- Identifying existing and emerging in-demand industry sector(s);
- Identifying existing and emerging in-demand occupations;

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- (Revised) Providing data describing the industry location quotients (LQ) of the region and local area(s); and
- Describing the employment needs of employers in existing and emerging in-demand industry sectors and occupations.

**The regional area may support the narrative by:**

- Additional narrative may include similarities and differences of associated local areas: specifically, the economic conditions and competitive strengths and weaknesses of business market factors found in each local area.

**1.4. Describe the regional service strategies aimed at achieving the vision and goals established for the region. [WIOA Sec. 106(c)(1)(B); 20 CFR 679.510(a)(1)(ii)]**

**Factors being considered include, but are not limited to:**

- Broad-based, overarching sector and industry strategies, including an apprenticeship strategy;
- Coordination of services with regional economic development services and providers in the region;
- Any cooperative service delivery agreements that have been established for the region;
- How the region will connect targeted populations, especially youth and individuals with barriers to employment, to career services and training activities offered on a regional level, such as YouthBuild, Job Corps and AmeriCorps programs. Data measuring the number of youth, and specifically opportunity youth, enrolled in these programs must be provided to support the narrative, as appropriate;
- How will regional business service strategies be employed, as well as, how coordination of these strategies will impact the operational level of services (i.e., local area Business Service Teams, or BST); and
- How the region will coordinate with secondary and postsecondary institutions (including programs authorized by the Perkins V Act) to align strategies, enhance services and avoid duplication of services (include specific reference to adult education, community colleges and community education councils).

**1.5. Describe the development and implementation of sector initiatives for in-demand industry sectors or occupations for the region. [WIOA Sec. 106(c)(1)(C); 20 CFR 679.510(a)(1)(iii)]**

**Expectation:** The narrative response must capture any sector or industry initiatives, partnerships, next-generation sector partnerships and any other sector-based initiatives that support all or part of the region (including economic development partners).

**Factors being considered include, but are not limited to:**

- (Revised) The identity and description of key sector or industry initiatives, partnerships, registered apprenticeship ecosystems, next-generation sector partnerships and any other sector-based initiatives that support all or part of the region;
- An explanation why the region targeted select sectors, partnerships and other initiatives; and
- A description of, and reasoning for, the current in-demand occupation(s) that are expected to change status as well as occupations that may change to become an in-demand occupation.

**1.6. Describe how the region will connect employer labor force requirements and occupational demands with the region's labor force, including individuals with barriers to employment.**

**Expectation:** Regional plans must incorporate strategies that reflect local leaders and boards considering how to optimize the available opportunities and minimize the structural weakness presented by the current workforce system environment for the betterment of regional employers and the labor force.

**The regional area may support the narrative by:**

- (Revised) Including how the region will connect targeted populations, especially youth and individuals with barriers to employment, to in-demand occupations and Registered Apprenticeships;
- Including descriptions of when leaders, board members and stakeholders met and any subjects or resolutions that came to fruition; and
- Including summaries of any number of reports commissioned to research and determine recommended actions that are of concern to the local and regional workforce system leaders and stakeholders; examples include studies that indicate strategies and tactics that will increase the ability of employers to attract, hire and maintain regional labor force participants in gainful employment, or evaluations of best practices for serving the various classes of individuals with barriers to employment.

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**Note:** While it is important that the drafters understand the data and connect the labor force requirements with occupational demands, it is also important to connect with actual employers who will verify that need.

- 1.7. Describe the coordination of transportation and other supportive services for the region.** [WIOA Sec. 106(c)(1)(F); 20 CFR 679.510(a)(1)(vi)]

**Expectation 1:** The region must describe the role transportation plays in the relationship of the labor force and employment opportunities, display the commuting data such as inflow and outflow and other patterns, articulate available transportation modes' strengths and weaknesses, and indicate how the region may help bridge the transportation gap between labor force and employment locations. Describe transportation availability for workforce members who are unable to benefit from personal transportation.

**Expectation 2:** The region must describe any regional and inter-governmental agreements that allows the coordination of identified regionwide supportive services and resources in such a manner as to permit customers to participate.

- 1.8. Describe the region's strategy to increase participation on the statewide eligible training provider list.**

**Expectation:** Regional plans must articulate strategies to grow in number and improve the overall quality of eligible training provider participation in the statewide eligible training provider list.

- 1.9. Describe how the region established administrative cost arrangements, including the pooling of funds for administrative costs, as appropriate, for the region.** [WIOA Sec. 106(c)(1)(E); 20 CFR 679.510(a)(1)(v).]

**Expectation:** This narrative must provide a description of the regional activities (e.g., regional planning), how such activities were determined and what funds will be used to pay for those activities. The narrative must include the entity that will serve as the fiscal agent. Finally, the description must include how such regional cost arrangements will be handled for the region, including administrative costs, as appropriate.

- 1.10. Describe the agreement between the local boards that describes how the planning region will collectively negotiate and reach agreement with L&I on local levels of performance for, and report on, the performance accountability measures described in section 116(c), for each of the local areas within the planning region.** [WIOA Sec. 106(c)(1)(H); 20 CFR 679.510(a)(1)(viii)]

**Expectation:** WIOA sec. 107(d)(9) requires that local areas negotiate performance and 20 CFR § 679.510(a)(1)(viii) requires an agreement between local boards and chief elected officials for how a planning region will collectively negotiate and reach agreement with the governor on local levels of performance for, and report on, the performance accountability measures as required by WIOA sec. 116(c)(1)(H) and §679.510(a)(1)(viii). The representatives of each local area in a planning region are collectively responsible for the process. The narrative in the local area plan must provide a description similar to the agreement reached between the local boards and chief elected officials. The answer may simply be that each local area will negotiate individually with the state.