FutureWork SYSTEMS

NORTH CAROLINA · WIOA TITLE I & III

Proving Impact: ROI in WIOA Programs

Geoff Smith · October 2026

Funding portfolio

North Carolina Workforce Development has a diversified funding portfolio

WIOA is a major funding pillar, but not the only source supporting state and local efforts.

WIOA Title I & III funding

PY 21–26 WIOA Title I and III funding trend

Average annual allocation, 6 years

~$88.9M

Investment dropped, 2024–2026

–12.6%

PY 2026, lowest investment

$81.5M

Funding and purchasing power

Funding is down — and buys less

Average year-over-year funding change

–1.6%

Funding, PY 21 vs PY 25

–7%

PY 25 purchasing power vs PY 21

–19.9%

Year-over-year change in participants served

–4.9%

PY 25 real funding per participant served, vs PY 21

–3.5%

Inflation-adjusted to PY 21 dollars

Allocation

$85,497,114

Total WIOA Title I & Title III allocation

Participants exited

79,141

Distinct participants who received staff-assisted services and exited the WIOA program

Employed in Q2 after exit

53,386

Employed in the second quarter after exit

Employment rate

67.5%

Employment rate, second quarter after exit

Average annual earnings

$38,441

Estimated average annual earnings per employed participant

Total annual earnings

$2,052,234,428

Estimated total annual earnings of employed participants

Funding-to-earnings ratio

$24

in participant wages for every $1 invested

PY2021–PY2025

Funding-to-earnings ratio

Wages per $1 invested, by program year

PY 21	PY 22	PY 23	PY 24	PY 25
$24	$26	$23	$24	$24

Source: FutureWorks BI, North Carolina WIOA Title I and III participant outcomes; U.S. Department of Labor, PY2025 allotments (TEGL 10-25). Calculations by FutureWorks.

RETURN ON INVESTMENT

ROI is more than a cost-benefit calculation.

How well are we advancing our goals?

State plan

What are our investment goals?

01

Equity

Expand access to education, training and employment for people facing barriers, and make NCWorks services more accessible and coordinated.

02

Skills and credential attainment

Increase skills, recognized credentials and educational attainment so workers can enter and advance in high-demand careers with family-sustaining wages.

03

Employer-led talent development

Align education and workforce resources with employer demand.

Community ROI · Equity

Are we reaching the communities that need us most?

When the workforce system reaches people with the greatest barriers and helps them get jobs and higher earnings, the whole community benefits → return on investment.

Productivity ROI · Talent pipeline development

Are we preparing skilled workers for priority occupations?

When more participants complete training in priority occupations, North Carolina gets more qualified workers filling high-demand jobs — and that produces measurable economic value → return on investment.

Employer ROI · Industry alignment

Are we preparing workers for priority industries and seeing sustained employer connections?

If we train people for the jobs North Carolina employers need filled, employers benefit → return on investment.

SECTION 01

Labor market snapshot

North Carolina

Key labor market indicators

Labor market facts

$47,970

Median annual wage

Slowing growth

Labor force

5.3M

Unemployment rate

3.5%

National: 4.1%

Labor force participation rate

57.8%

Sector employment and demand

Top sectors by employment

SECTOR	JOBS	TODAY'S DEMAND	TOMORROW'S GROWTH	PRIORITY
Trade, Transportation & Utilities	940,600	✓	✓	✓*
Government	780,700	✓	✓†	
Professional & Business Services	764,900	✓	✓	✓*
Private Education & Health Services	742,000	✓	✓†	✓*
Leisure & Hospitality	558,100	✓	✓	
Manufacturing	450,000	✓‡		✓*
Financial Activities	311,700	✓	✓	
Construction	297,300	✓	✓	✓*

State-plan focus areas

Top sectors and state-plan focus areas

BROAD SECTOR GROUP	STATE-PLAN FOCUS AREAS
Trade, Transportation & Utilities	Clean energy; clean mobility
Government	None identified
Professional & Business Services	Information technology; biotechnology; clean energy
Private Education & Health Services	Healthcare; allied health
Leisure & Hospitality	None identified
Manufacturing	Advanced manufacturing; furniture; biopharma; semiconductors; aviation; clean technology
Financial Activities	None identified
Construction	Broadband; clean energy

Occupational growth groups

01 Healthcare practitioners and technical occupations

02 Healthcare support

03 Computer and mathematical occupations

04 Transportation and material moving

05 Business and financial operations

06 Management

07 Educational instruction and library

08 Food preparation and serving

SECTION 02

Who we serve

Program Year 2025 · 7/1/2025 – 6/30/2026

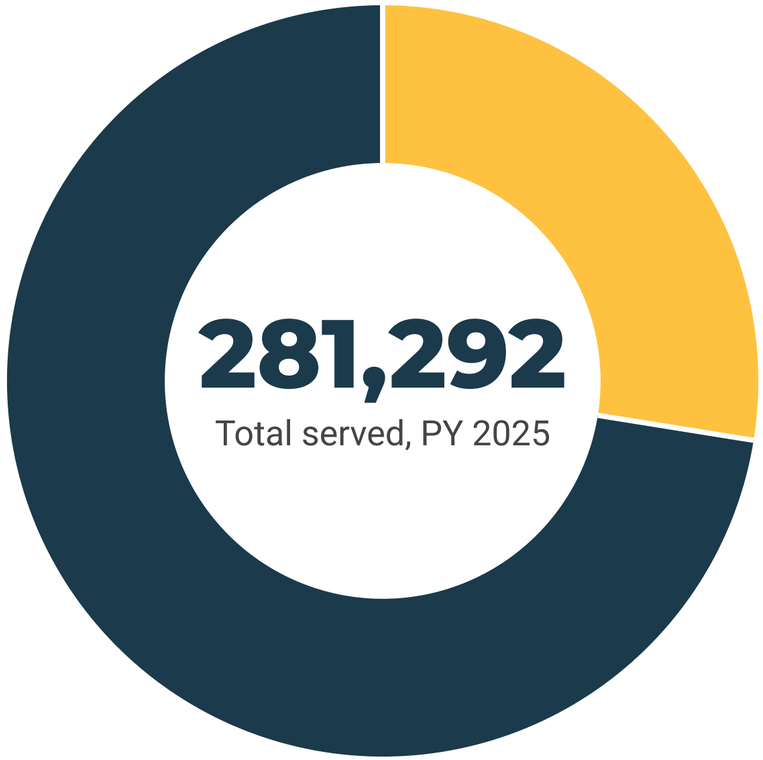
Served individuals

281,292

Served individuals

Served individuals vs participants

Served individuals and staff-assisted participants



77,428 · 27.5%
Participants — received staff-assisted services

203,864 · 72.5%
Reportable individuals

Barriers to employment

Barriers to employment, by program



Title I · 10.5%

92%

report barriers to employment
8,136 participants

Title III, not Title I · 89.5%

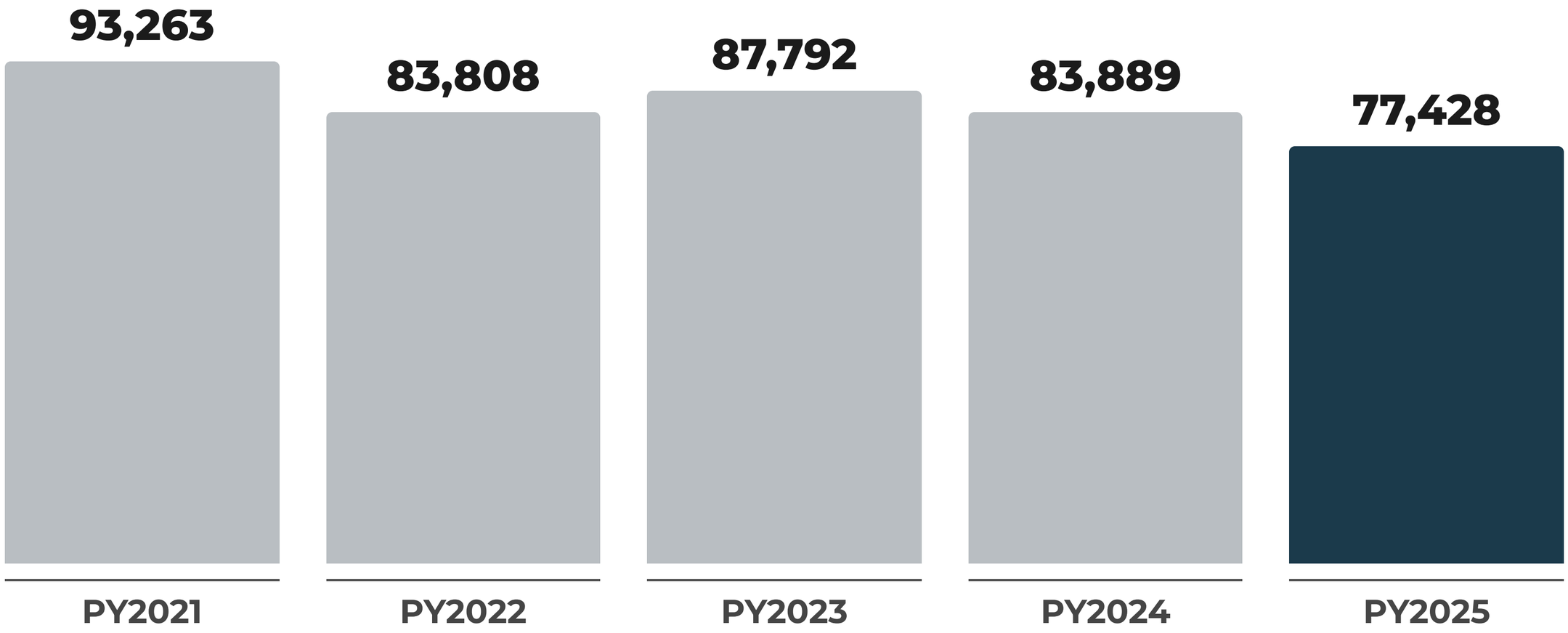
54%

report barriers to employment
69,292 participants

All 77,428 participants: 58% report barriers to employment.

Participants served

Participants served fell 17% since PY2021

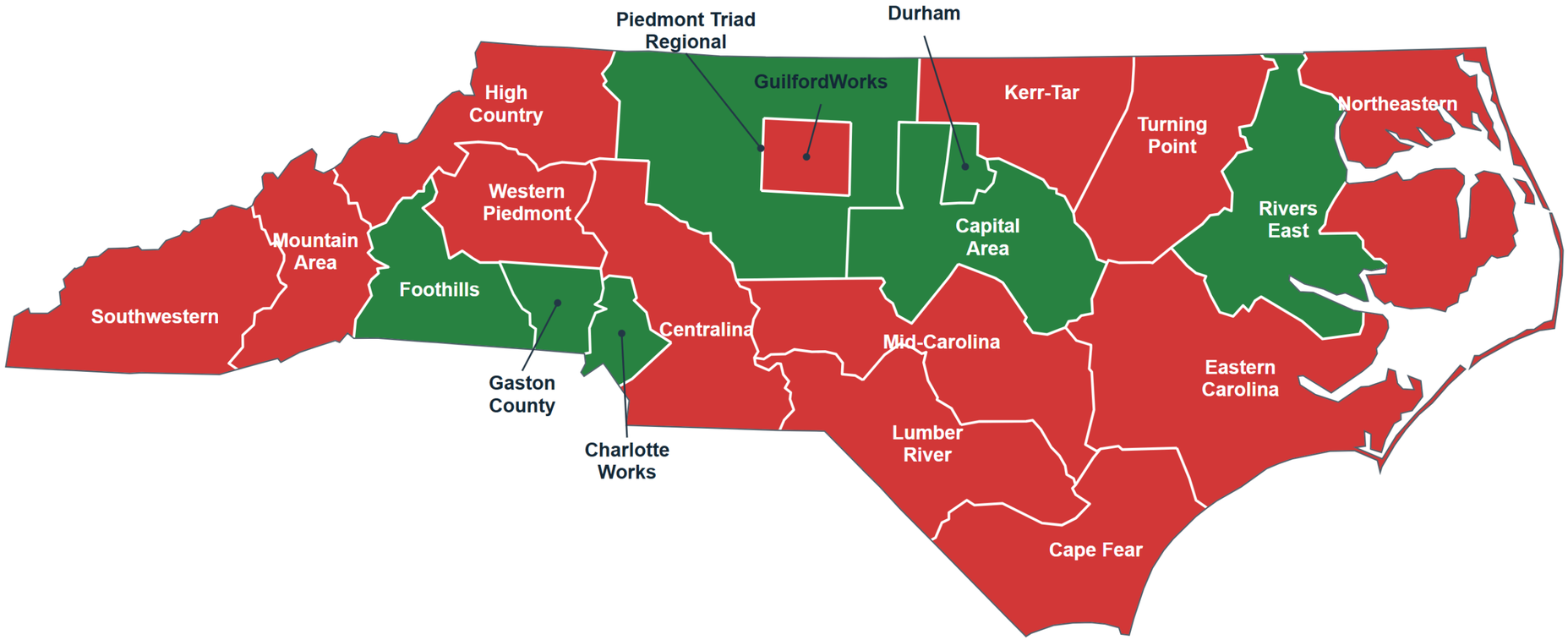


Participants served, statewide

Participants served by board

7 boards served more people; 13 served fewer

Growing · 7 boards **Declining · 13 boards**



Participants served by board

Which boards grew and which declined

▲ Growing · 7

- Capital Area
- Charlotte Works
- Piedmont Triad Regional
- Rivers East
- Foothills
- Gaston County
- Durham

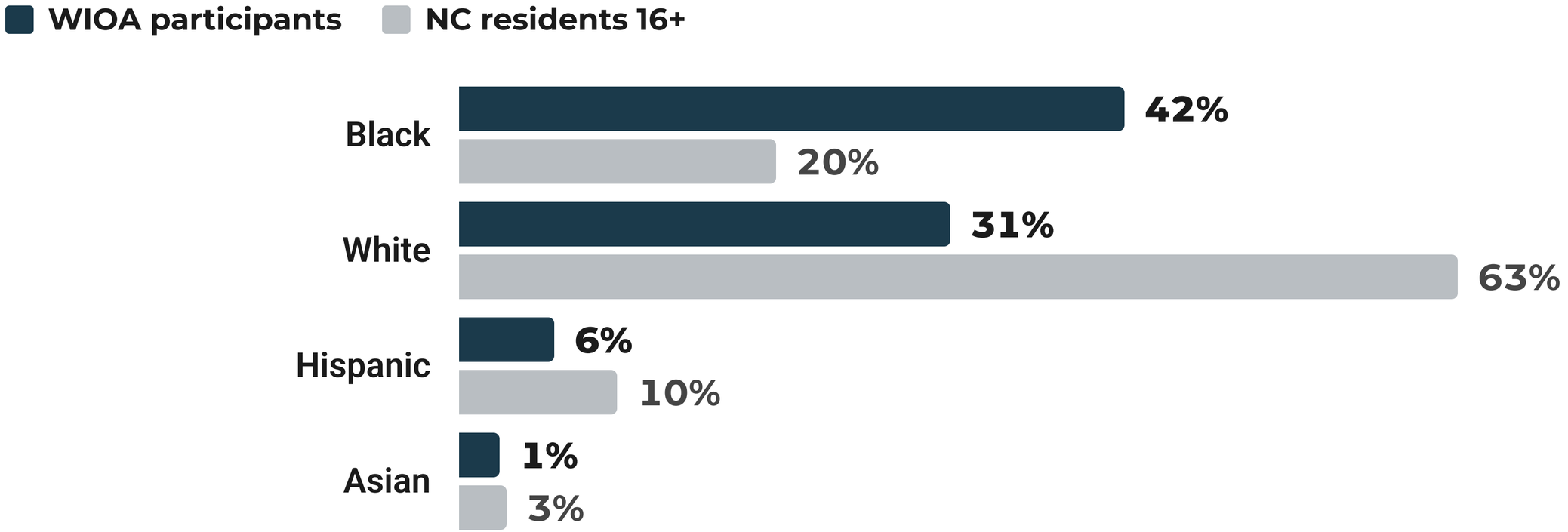
▼ Declining · 13

- GuilfordWorks
- Lumber River
- Turning Point
- Mountain Area
- Southwestern
- Northeastern
- Mid-Carolina*
- Centralina
- Eastern Carolina
- Western Piedmont
- Cape Fear
- High Country
- Kerr-Tar

Ordered by PY2025 participants served. *Mid-Carolina measured PY2022–PY2025.

Race and ethnicity

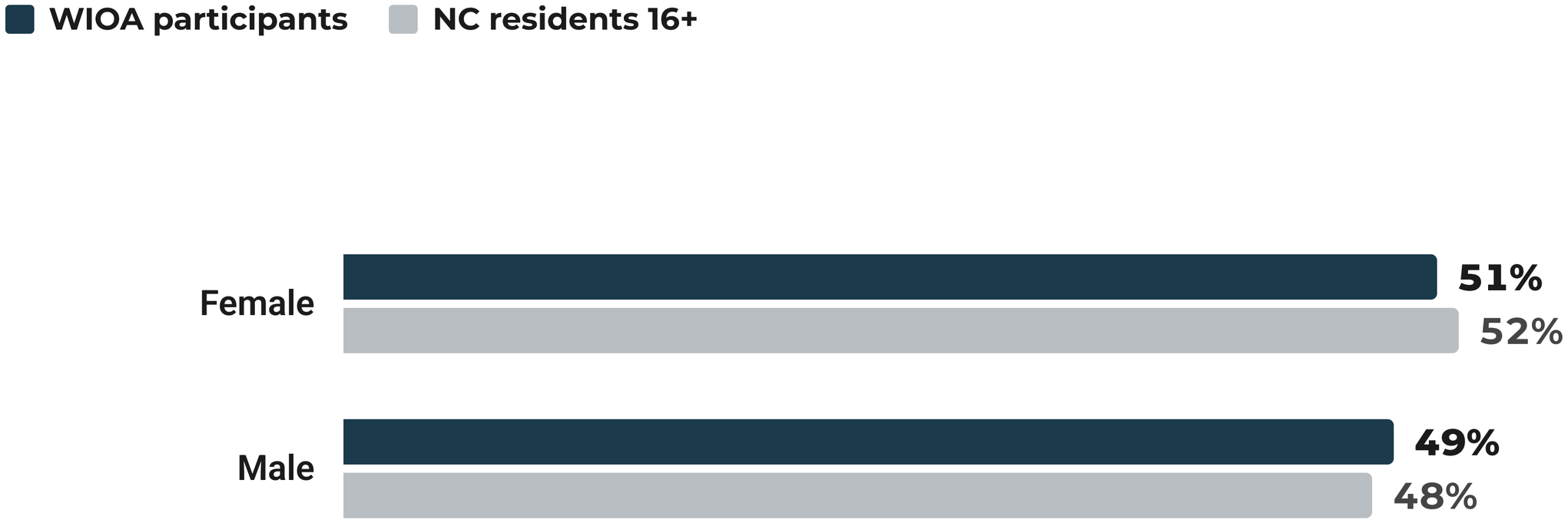
WIOA reaches Black residents at twice their share of the state



18% of participants did not report race or ethnicity.

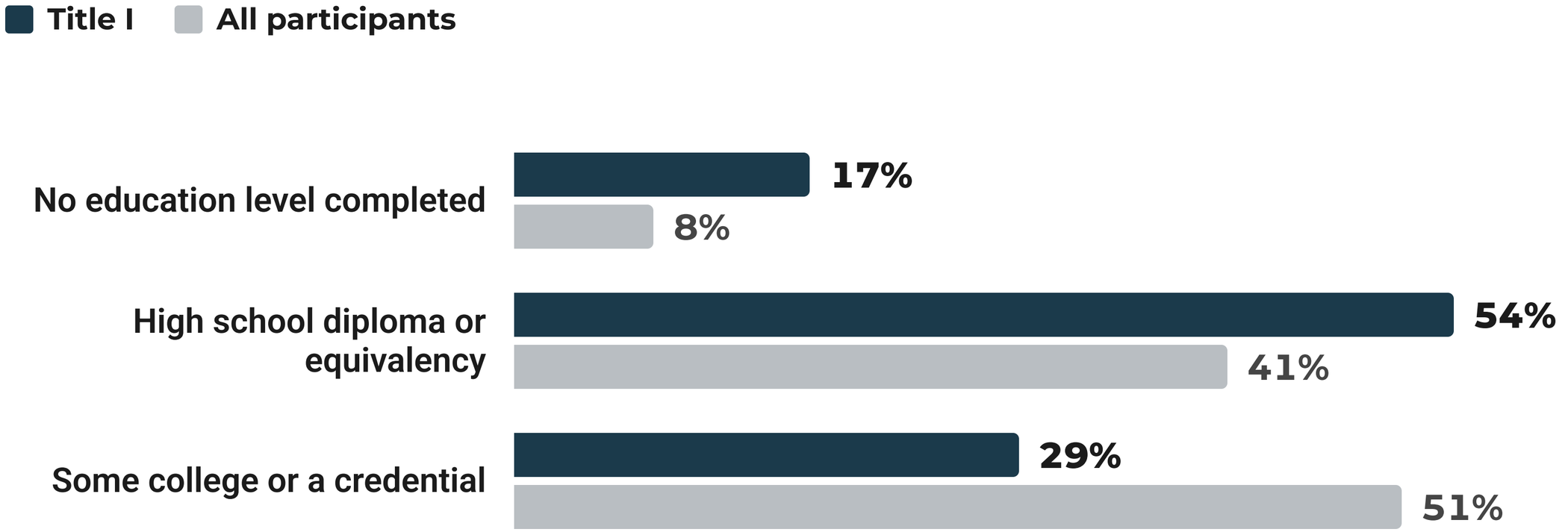
Sex

Participants mirror the state by sex



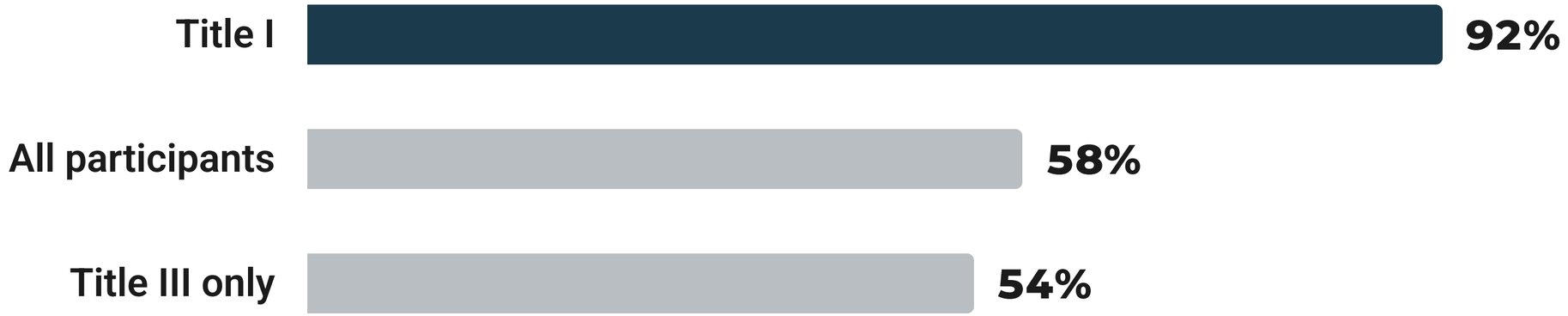
Education at entry

71% of Title I participants have a high school diploma or less



Barriers to employment

9 in 10 Title I participants report a barrier to employment



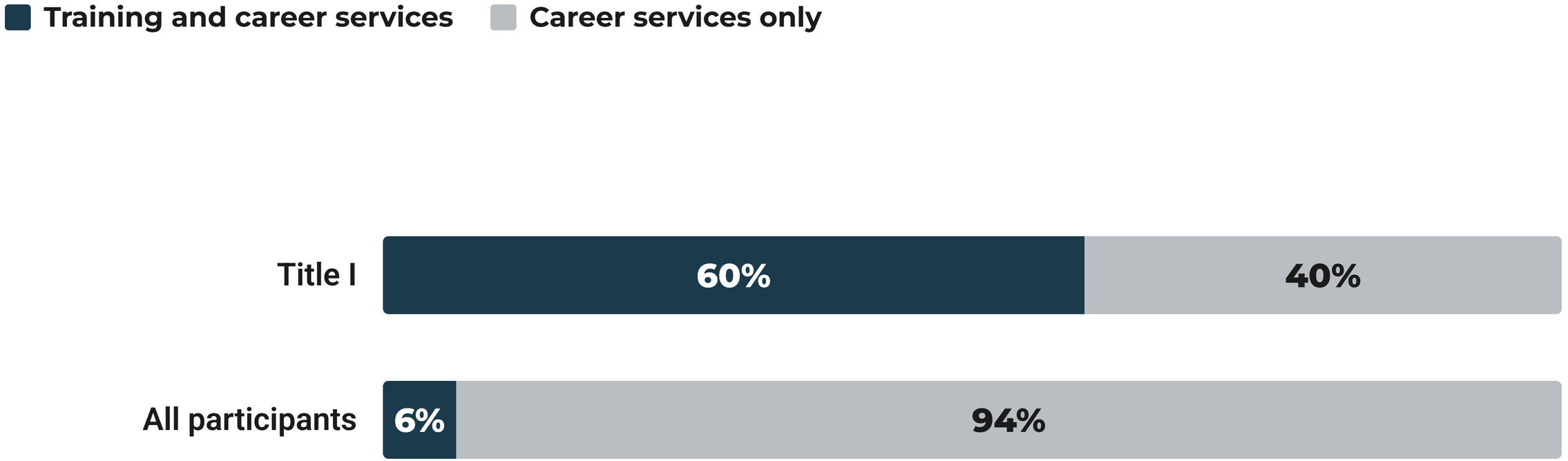
SECTION 03

What we do

Program Year 2025 · 7/1/2025 – 6/30/2026

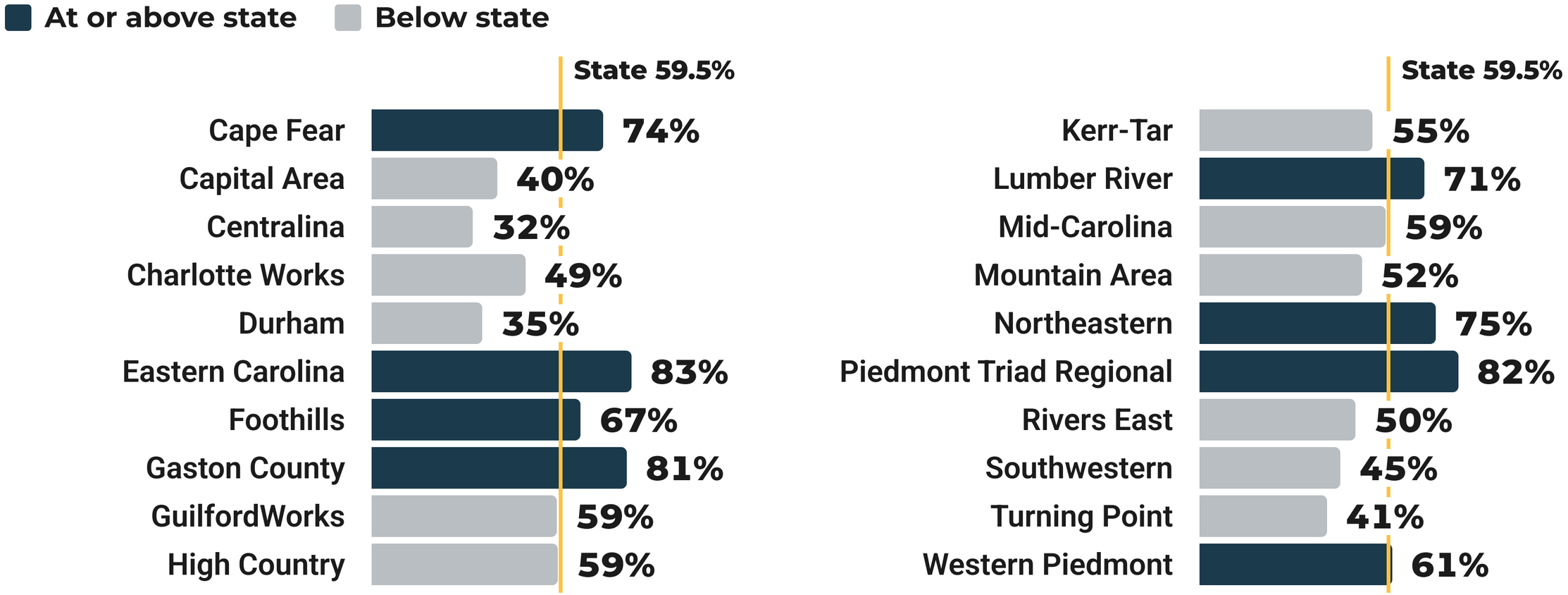
Service mix

6 in 10 Title I participants get training



Training share by board

Title I training ranges from 32% to 83% across boards



All 20 boards, A–Z · PY2025

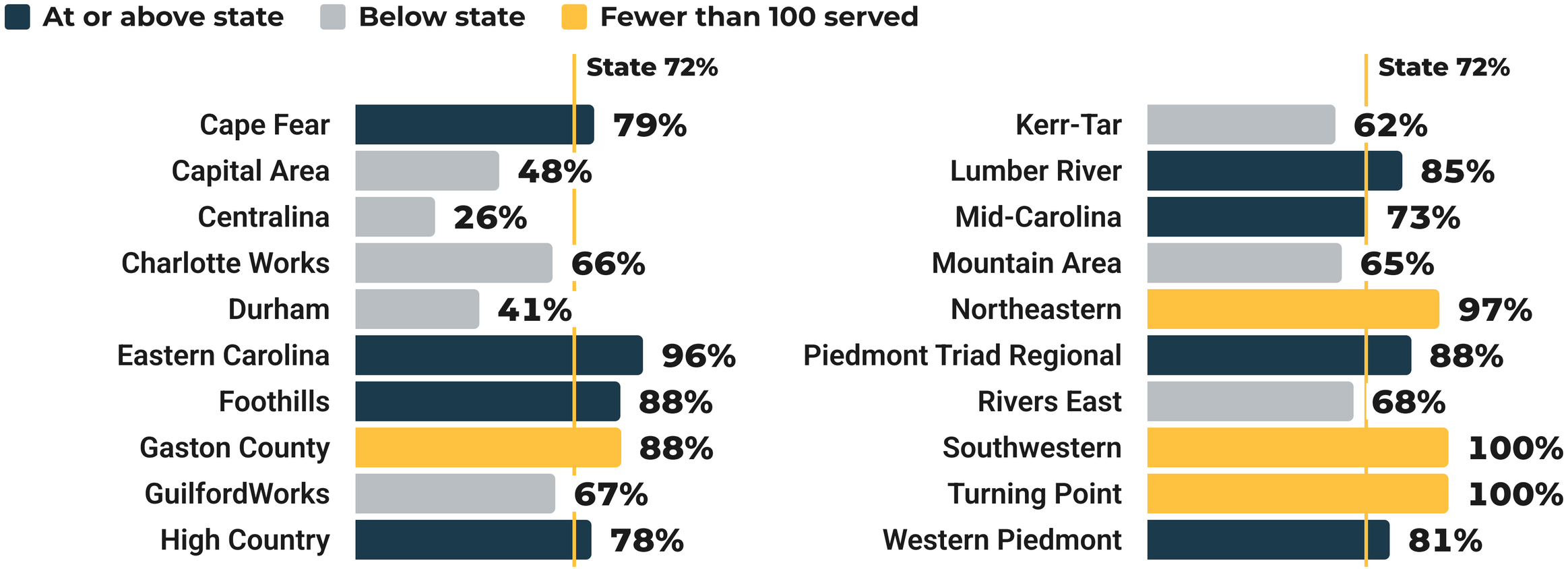
Share of participants trained

Training shares slipped over five years

	PY2021		PY2025	
Adult and Dislocated Worker	80%	→	72%	−8 pts
All Title I	64%	→	59%	−5 pts

Training share by board

Adult / DW training ranges from 26% to 100% across boards



All 20 boards, A–Z · PY2025

Training entries by type

94% of training is skill upgrading; 6% is employer-driven

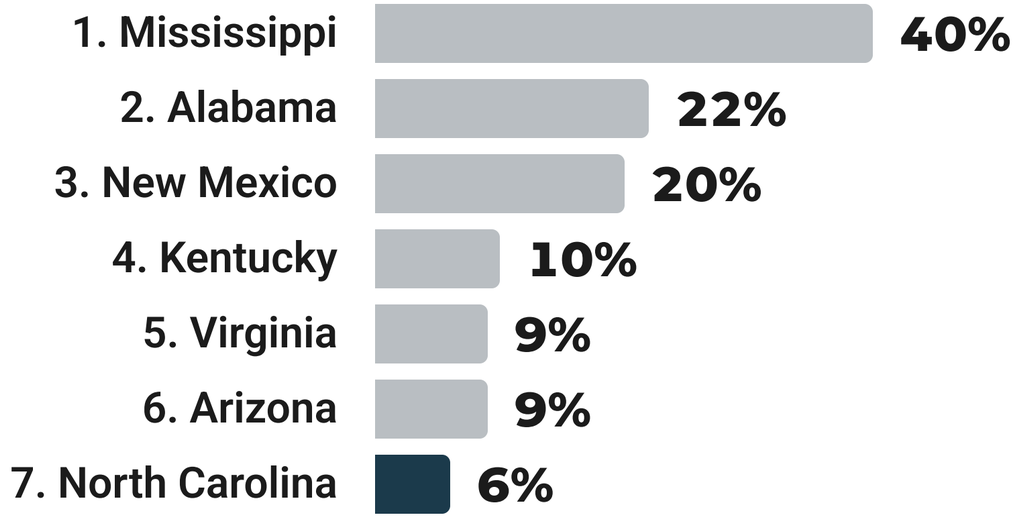


ADULT & DW | PY2024 · DIFFERENT PERIOD

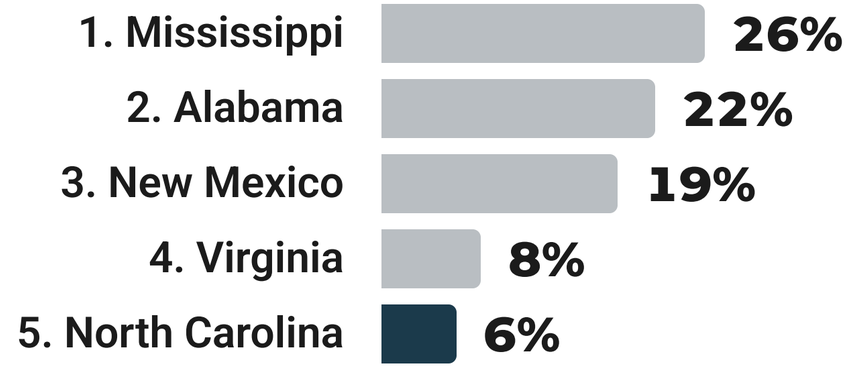
Employer-driven training · 11-state peer group

North Carolina ranks 7th in employer-driven training and 5th in OJT

Employer-driven training



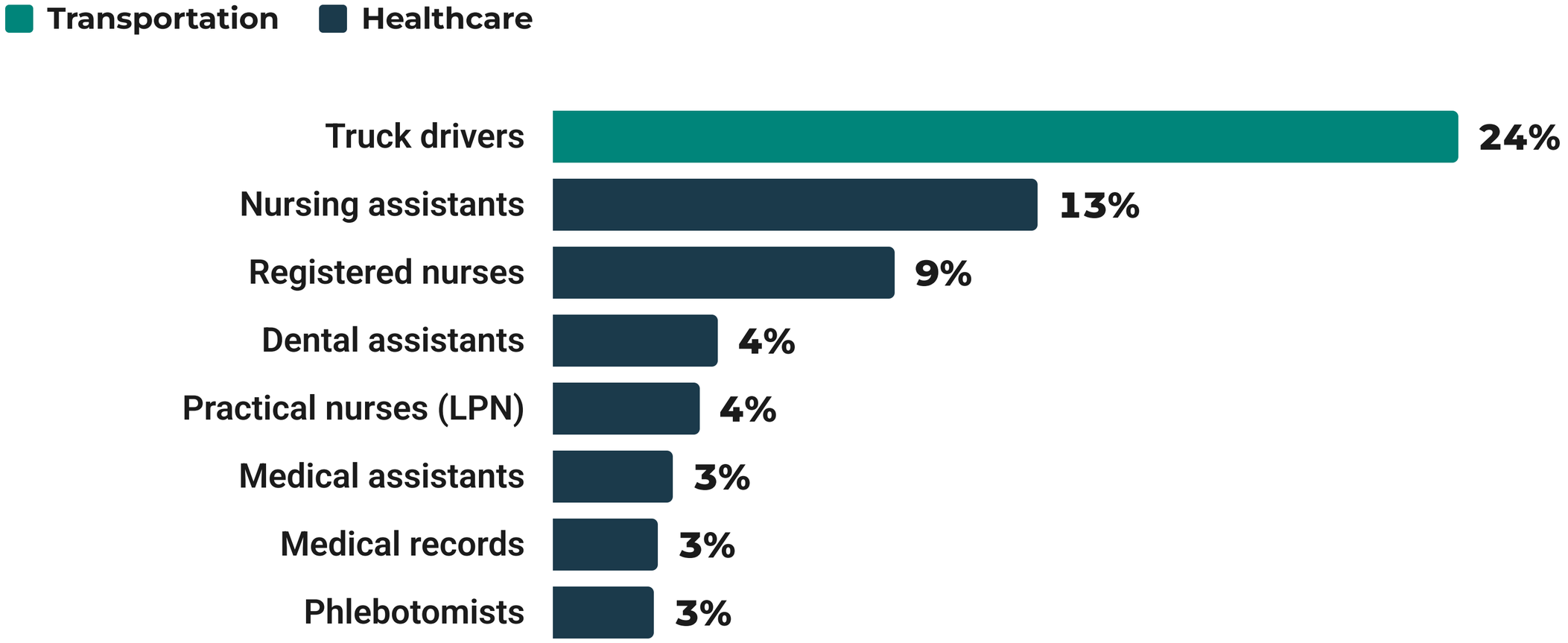
On-the-job training



Share of Adult / DW trainees · PY2024 · first training

Top training occupations

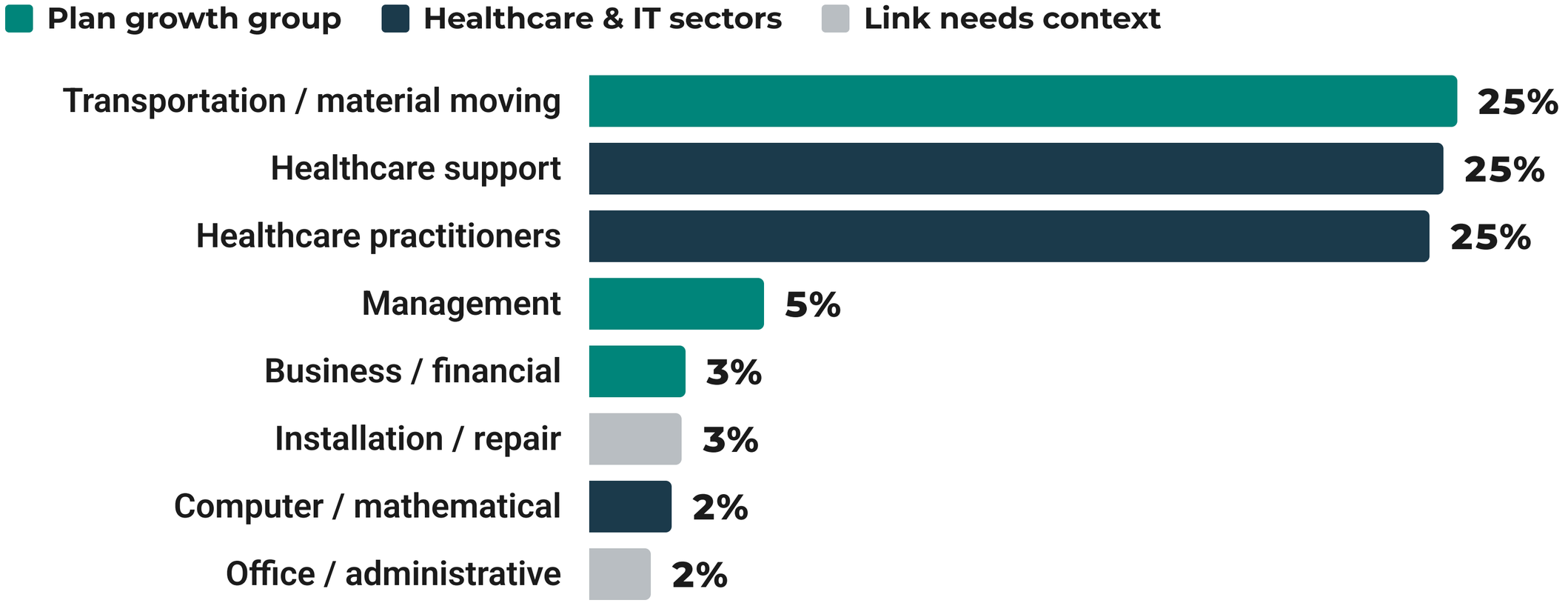
Trucking and healthcare lead training



Share of 3,552 Adult / DW trainees

Trainees by occupational group

Transportation and healthcare account for 75% of trainees



Share of 3,552 Adult / DW trainees

Training completion · 8 largest groups

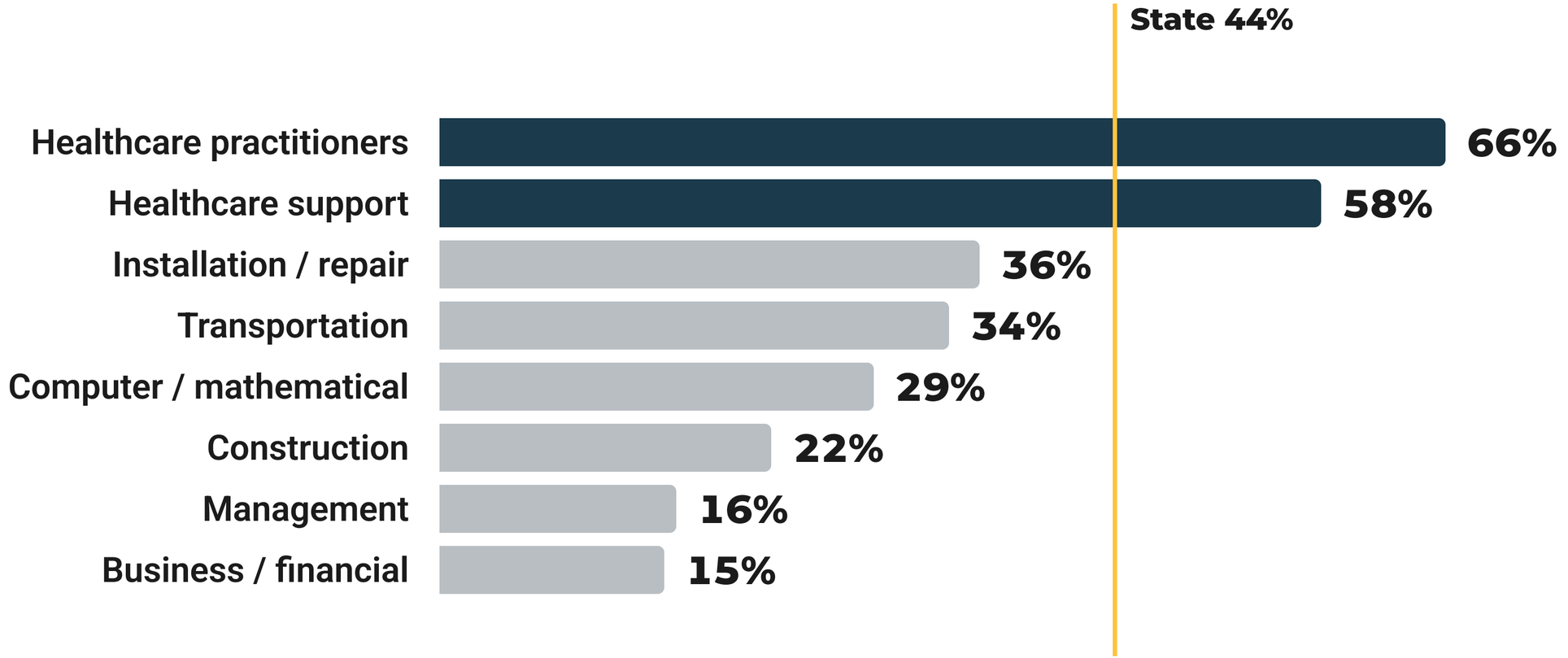
74% of exiters completed training; healthcare practitioners trail



1,724 Adult / DW exiters who received training

Supportive services · 8 largest groups

44% of exiters received supportive services — most often in healthcare



1,724 Adult / DW exiters who received training

Training completion by supportive services

Exiters with supportive services completed training more often



1,724 Adult / DW exiters who received training

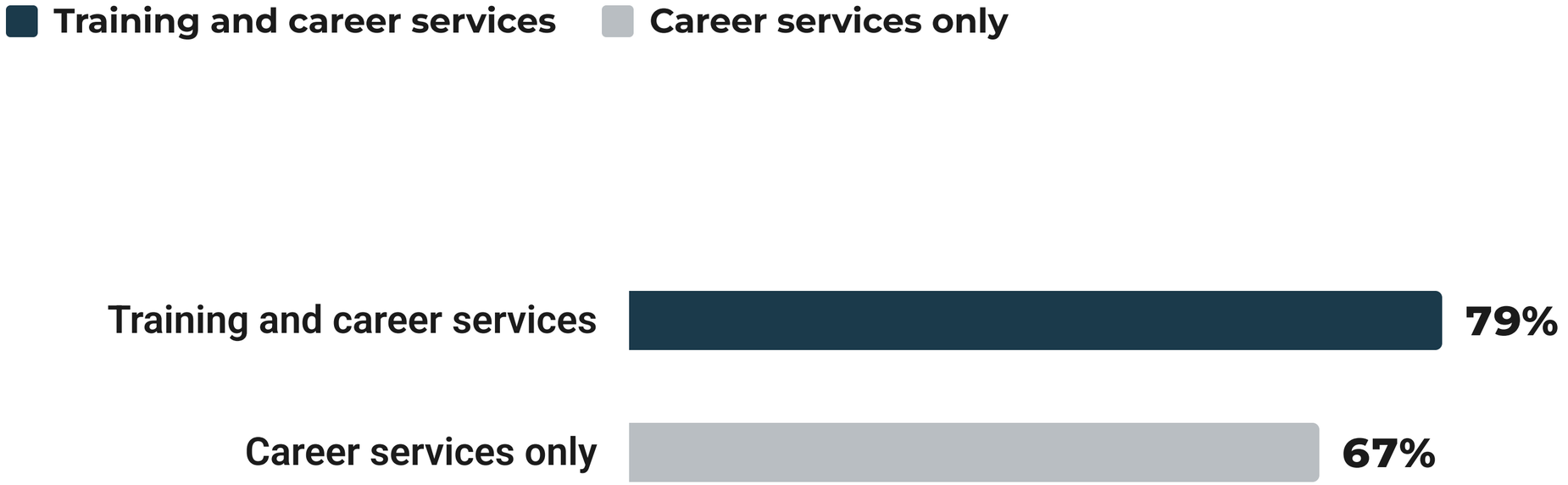
SECTION 04

What we achieve

Program Year 2025 outcomes · exits 1/1/2024 – 6/30/2025

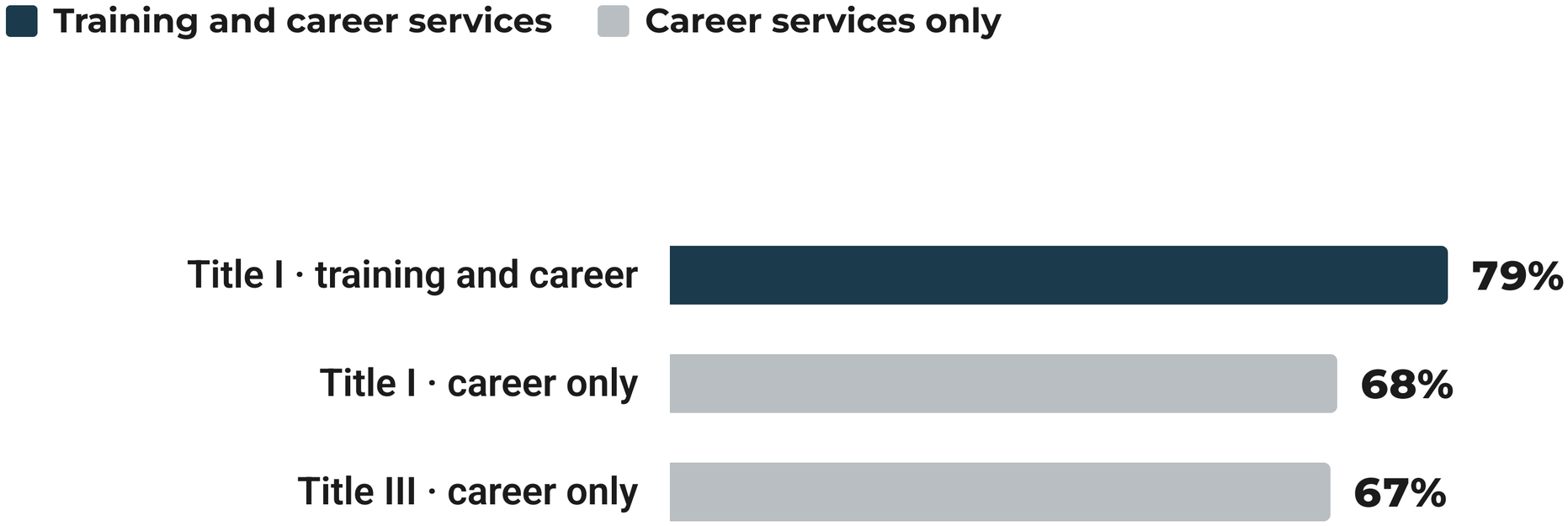
Employed in Q2 after exit

79% of trained participants were employed, vs 67% with career services only



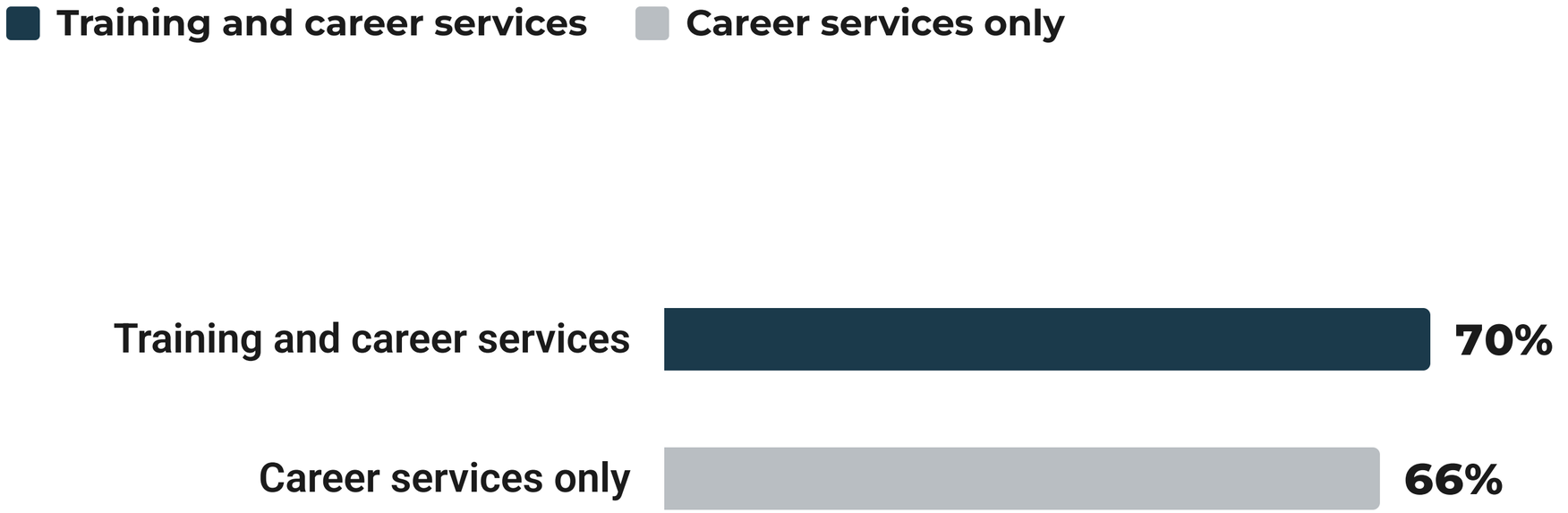
Employed in Q2 after exit

Title I participants with training were 11 points more likely to be employed



Effectiveness in serving employers

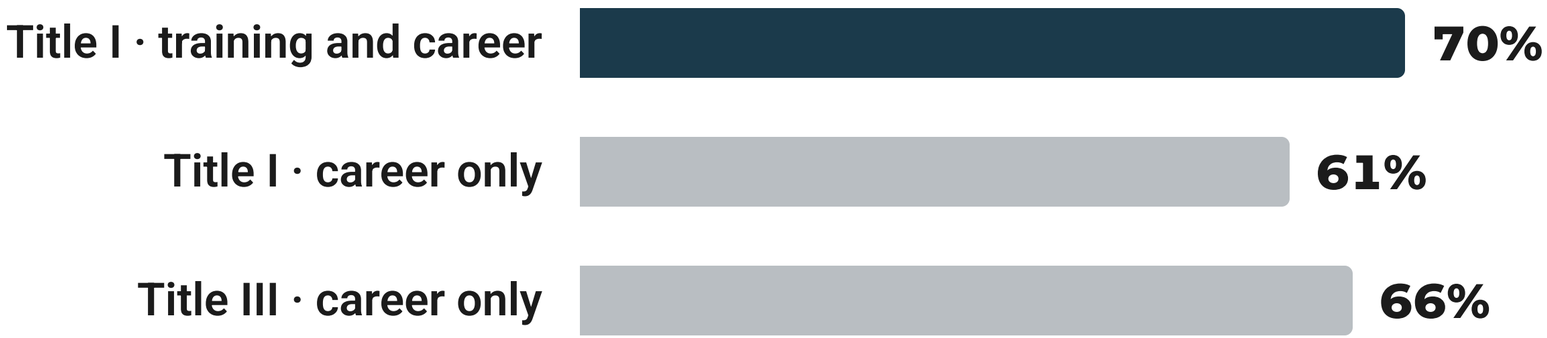
Trained participants stayed with employers more often: 70% vs 66%



Effectiveness in serving employers

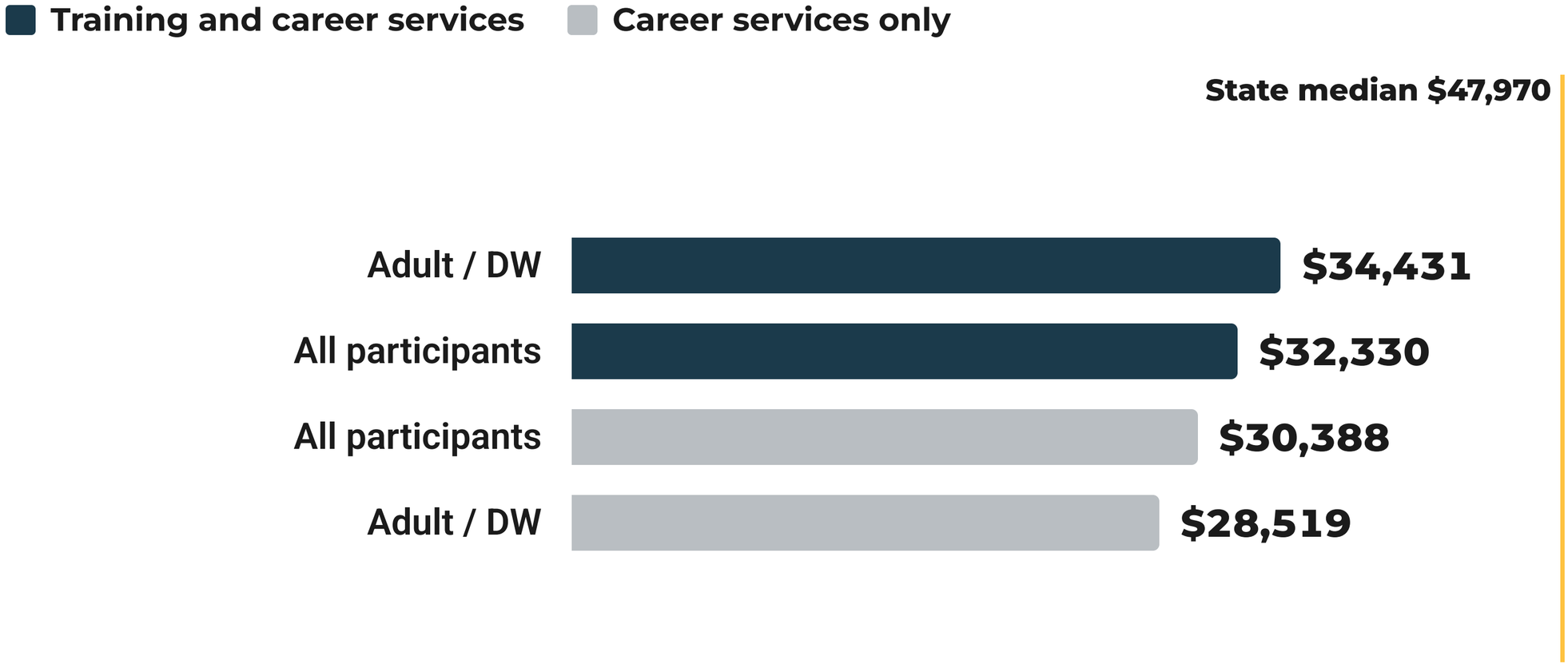
Title I training adds 10 points in employer retention

Training and career services Career services only



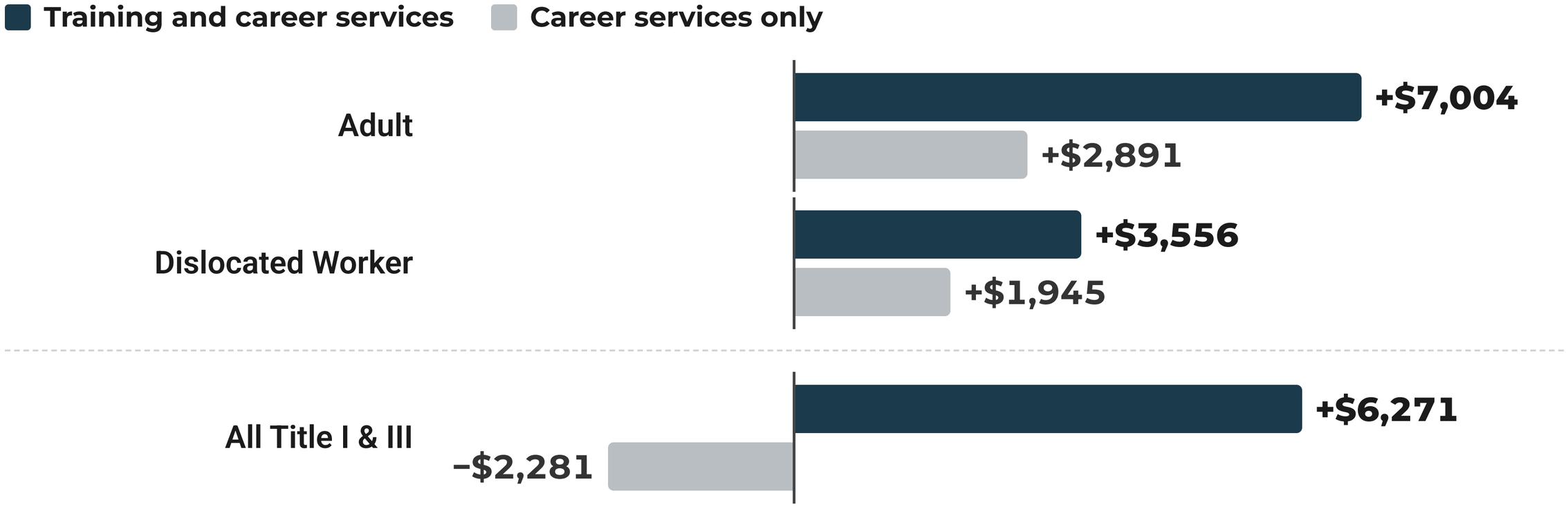
Estimated annual earnings

Trained Adult / DW participants reach 72% of the state median wage



Earnings change, before vs after

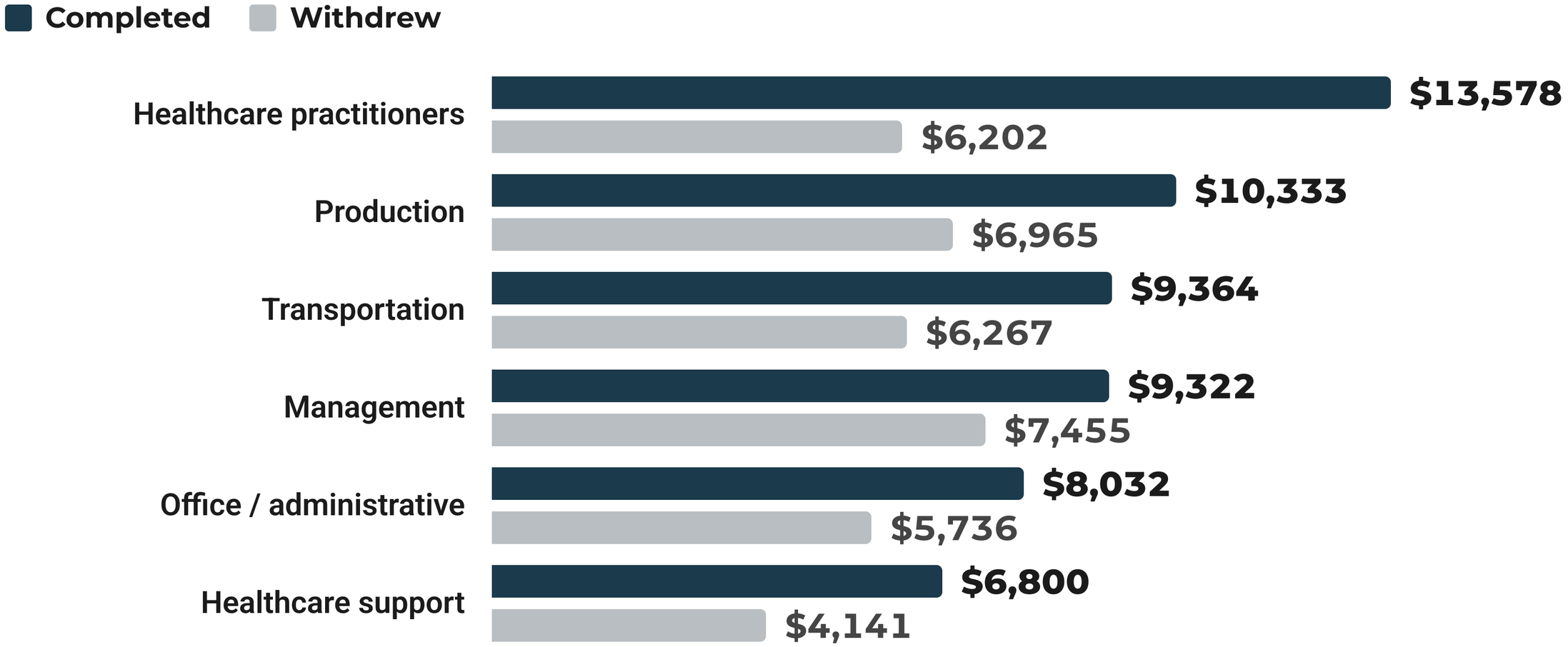
Adult and Dislocated Worker earnings rose with or without training — more with training



All Title I & III career-services-only participants are 98% Title III.

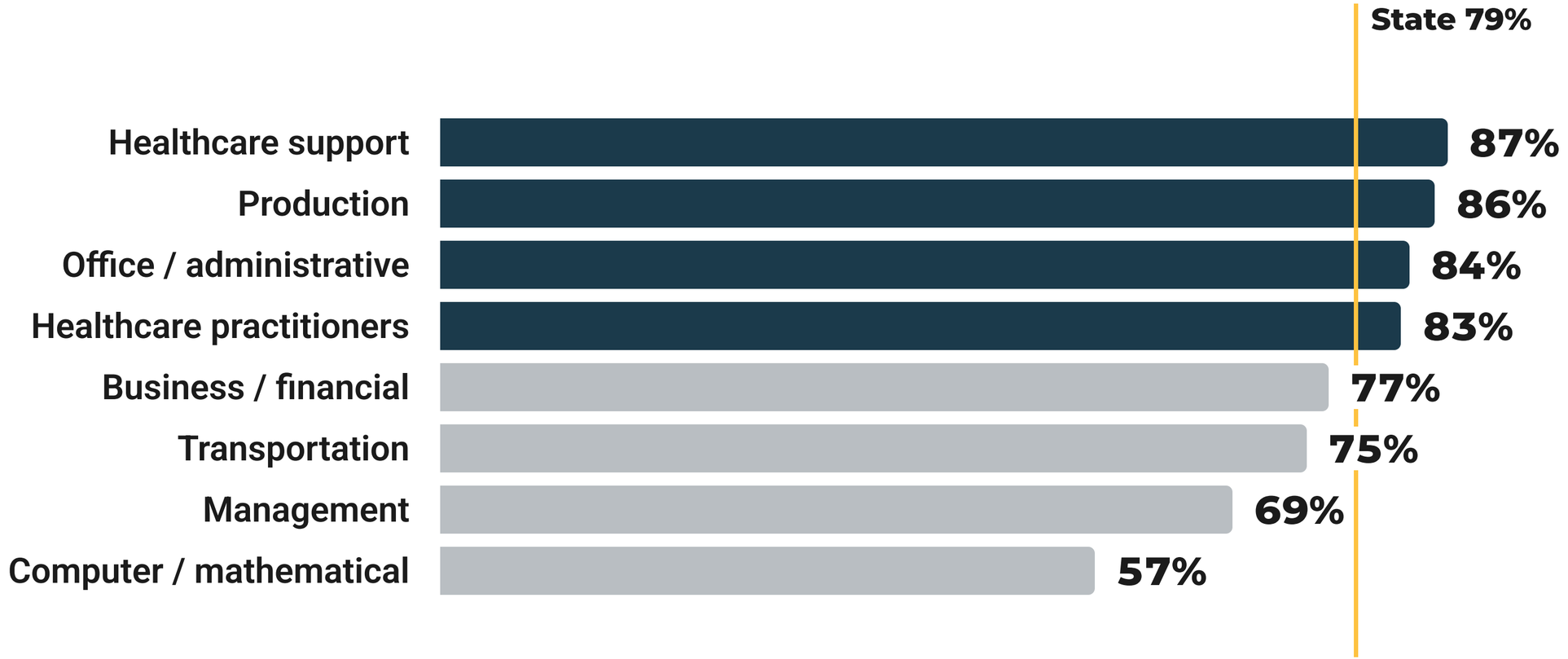
Median quarterly earnings after training

Completers out-earn those who withdrew



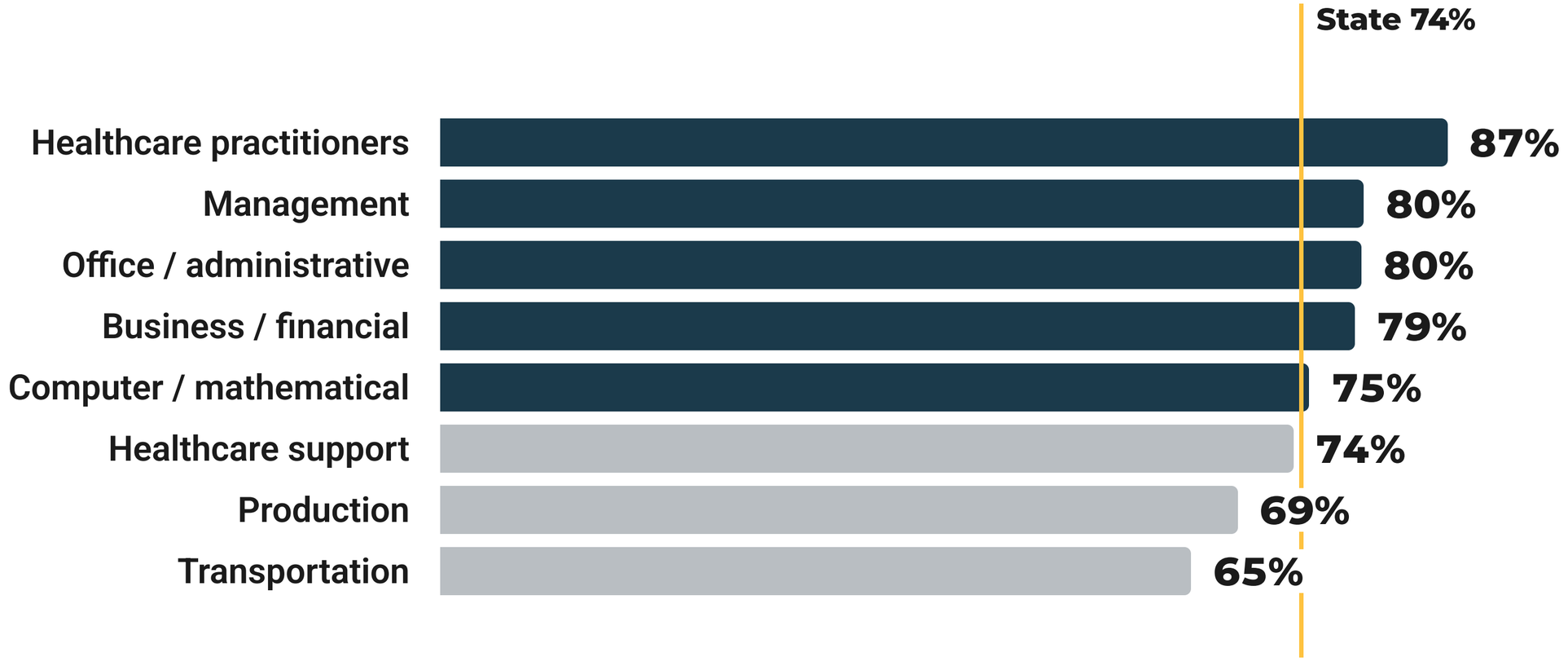
Employed in Q2 · 8 largest groups

79% of completers were employed; healthcare support led at 87%



Employer effectiveness · 8 largest groups

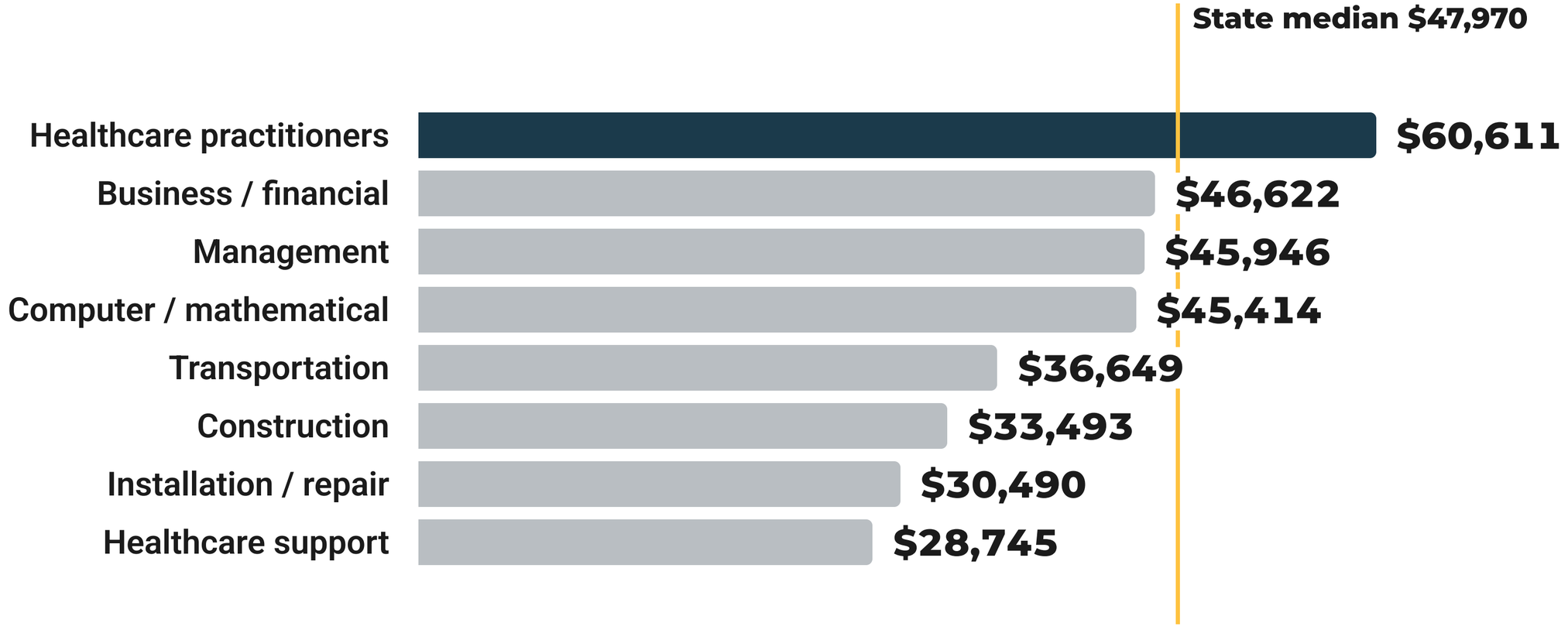
74% stayed with the same employer; healthcare practitioners led at 87%



Adult / DW training completers · PY2025

Estimated annual earnings · 8 largest groups

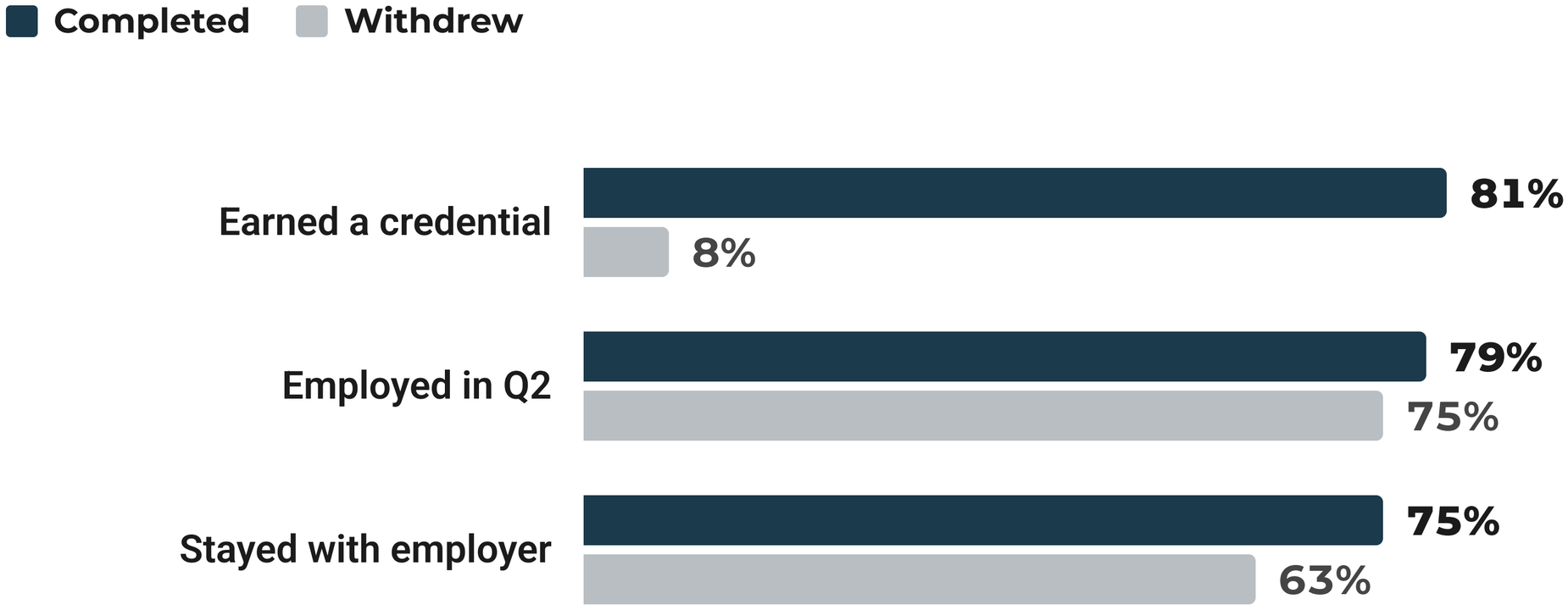
Healthcare practitioners earn above the state median wage



Adult / DW training completers · PY2025

Training outcomes

Completers were 10 times as likely to earn a credential



Training and career services

Title I Adult and Dislocated Worker training completers

$40,616 Average annual wage

79.2%
Found employment after exit

$7,499
Earnings gain

74.6%
Same employer in Q4

80.9%
Earned credentials

SECTION 05

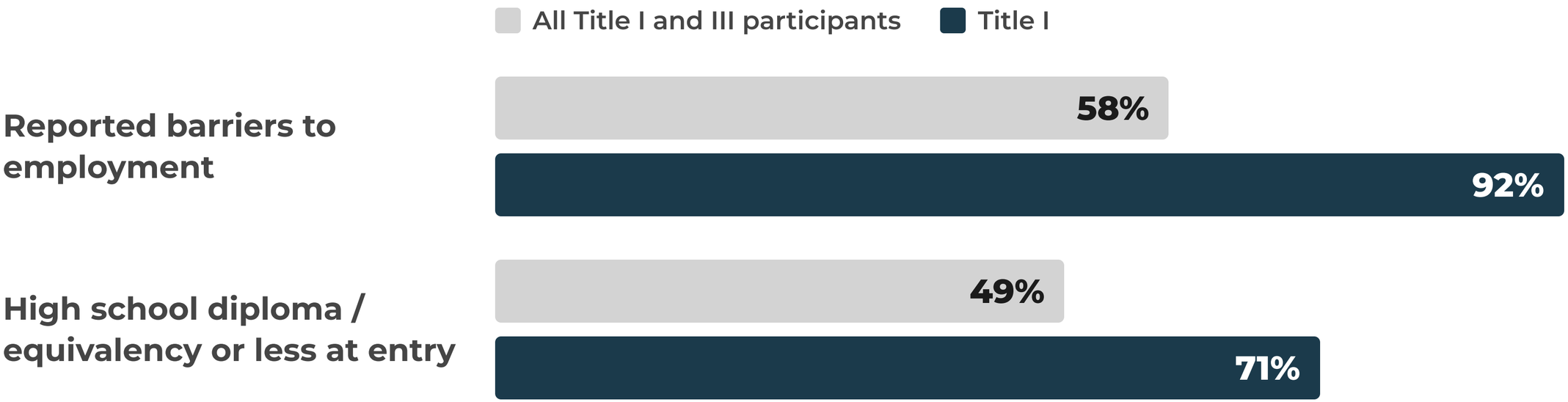
Return on investment?

Program Year 2025 · 7/1/2025 – 6/30/2026

Community ROI · Equity

Are we reaching the communities that need us most?

Title I reaches participants with substantial employment barriers and less formal education.



North Carolina, PY2025 · 77,428 distinct participants, including 8,136 in Title I. Title I is included in the overall group. ROI lenses describe evidence of public value; these slides do not calculate a financial return.

Productivity ROI · Talent pipeline development

Are we preparing skilled workers for priority occupations?

North Carolina is preparing workers and supporting training completion.

72%

received training

3,552 of 4,933 Adult and Dislocated Worker participants served

74%

completed training

1,276 of 1,724 trained Adult / DW exiters

80.9%

earned credentials

Training completers in the credential-attainment measurement group

North Carolina, PY2025 · Each measure uses its own participant group; these are separate measures, not stages of one cohort. Sources: NC training and completion extracts; ADDW Completed Training Outcomes, statewide summary.

Employer ROI · Industry alignment

Are we preparing workers for priority industries and seeing sustained employer connections?

Training completers show strong employment and employer retention.

74.1%

retained with the same employer

In the second and fourth quarters after exit: 1,022 of 1,380 measured

79.0%

employed in the second quarter after exit

1,260 of 1,594 Adult / DW training completers measured

74.7%

trained in healthcare and transportation

2,653 of 3,552 trainees, connected to state-plan sectors and growth areas

North Carolina, PY2025 · Each outcome uses its own measurement group; employment may be outside the occupation trained for. Sources: NC completer outcomes and occupational training extracts. State-plan connections are analyst assessed.

PY2025

Estimated total annual earnings

$2,052,234,428

One indicator of impact. The full investment story has three lenses.

Community ROI	✓ POSITIVE
Productivity ROI	✓ POSITIVE
Employer ROI	✓ POSITIVE

Questions?

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