

**WORKFORCE INVESTMENT CORPORATION
BOARD MEETING
June 26, 2013 – 1:00 P.M.
Martin Inn & Conference Center – Clemson, SC**

AGENDA

- | | |
|---|----------------------------------|
| I. Call to Order/Opening Remarks | Stan Brooks, Board Chair |
| II. Approval of Minutes (04/24/13)* | Stan Brooks |
| III. SC Works WorkLink Transition Plan | Ronnie Allen, Executive Director |
| IV. Committee Reports | |
| A. Youth Council | Robert Halfacre |
| i. PY'13 Youth Budget – Defer to Finance | |
| ii. Youth Council Membership Applications* | |
| iii. Youth Program Executive Summary | |
| iv. Next YC Meeting – August 5 th | |
| B. Business Partnerships Committee | Ed Parris, Chair |
| i. SCWRC Update | |
| ii. Business Service Integration Team Update | |
| iii. State Proposed Business/Employer Service Metrics | |
| C. Workforce Skills & Education Committee | Jennifer Kelly |
| D. Finance Committee | Brandi Runion |
| i. PY'12 Budget Overview | |
| a) Henkels & McCoy | |
| 1) Adult/DW Grant | |
| 2) Youth Grant | |
| b) WorkLink Grants | |
| 1) WIA Budget* | |
| 2) Rapid Response & Incentive Grants* | |
| ii. PY'13 Budget Overview | |
| a) PY'13 Funding Allocations | |
| b) WorkLink Grants | |
| 1) WIA Budgets* | |
| 2) Grant Opportunities | |
| c) Henkels & McCoy | |
| 1) Adult/DW Grant* | |
| 2) Youth Grant* | |
| V. Other Business | Stan Brooks |
| VI. Adjournment | |

** Action Required*

<p>NEXT MEETING – AUGUST 28, 2013 @ 1:00 P.M. MARTIN INN & CONFERENCE CENTER, CLEMSON, SC LUNCH IMMEDIATELY PRECEDES THE MEETING AT 12:00 P.M.</p>

**WORKFORCE INVESTMENT BOARD
BOARD MEETING
April 24, 2013 - Minutes
Madren Center – Clemson University**

Members Present:

Stan Brooks, Chair	Trent Acker	Ronnie Booth
Kristi King-Brock	Danny Brothers	David Collins
Stephanie Collins	Jason Duncan	Robert Halfacre
Melvin Martin	Burriss Nelson	Ed Parris
Mike Roneker	Pamela Smith	

Members Absent:

Elaine Bailey	Richard Blackwell	David Bowers
Mike Crawford	Mary Gaston	Billy Gibson
Charlie Haneman	Butch Harris	Terrance Hassan
Michael Keith	Mike Wallace	

Staff Present:

Sharon Crite	Jennifer Kelly	Patty Manley
Brandi Runion	Windy Graham	

Guest Present:

Dana Grant	Kal Kunkel	Matt Fields
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I. Call to Order

Chair Stan Brooks called the meeting to order. Chair Brooks announced a quorum was present to conduct the business of the Board and the meeting was being recorded for processing of minutes.

II. Approval of Minutes

The minutes from the February 27, 2013 meeting were e-mailed with the meeting notice, included in the meeting packet. Chair Brooks called for any corrections or amendments to the minutes.

BOARD ACTION TAKEN: David Collins made a motion to approve the minutes as submitted, second by Ed Parris. The motion carried with a unanimous vote.

III. Committee Reports

A.) Youth

i. Youth Council Information Update

Kristi King-Brock, Youth Council Chair provided an update from the March 4, 2013 Youth Council meeting on several topics: 1) The Youth Budget Negotiation Team will be meeting with PYC on May 7th at 10:00am prior to the Youth Council Meeting at 11:00am. The Negotiation Team consists of: Krisit King-Brock, Melvin Martin, Robert Halfacre, Sharon Crite, Brandi Runion and Jennifer Kelly. 2) Youth Council Membership is up for review, several membership terms are expiring and are up for renewal. 3) Youth Council will be researching DOL/WIA information on Apprenticeship Opportunities for at-risk out-of-school youth. 4) PY'13 Youth Budget A & Budget B information is deferred to the Finance Committee for further discussion.

ii. Poverty Simulation

Kristi King-Brock referred to pages 8-10 of the meeting packet and reminded Board members of the Poverty Simulation Training that will be held on Wednesday, May 8, 2013 at the Pendleton United Methodist Church Fellowship Hall from 3pm-5pm. Training will be conducted by Beth Templeton. Invitations have been extended to Youth Council and Board Members. Please RSVP to Patty Manley.

B.) Business Partnerships Committee Update

Ed Parris, Chair of Business Partnerships Committee stated due to having no action items, the committee voted to reschedule their meeting for May 22nd.

C.) Workforce Skills & Education Committee Update

Jennifer Kelly, staff liaison to the Workforce Skills & Education Committee provided an update from the April 10, 2013 meeting.

i. SC Works Operator Update

Ms. Kelly referred to pages 13-19 of the meeting packet stating these are the Operator Reports and reported that Henkels & McCoy is working on the final definitions of each item listed on the Usage Report and verifying that the data is pulling accurately from the data resources. The final definition and instructions on how the data is pulled will be shared with WorkLink staff and the Workforce Skills and Education Committee. The Committee also asked Henkels & McCoy to include data regarding WorkKeys in order to track progress for the WorkReady Communities Initiative.

ii. PY'13 Budget Negotiation Team Recommendation

Ms. Kelly reported the Henkels & McCoy grants for SC Works Operator and the WIA Adult and DW program funded under Title 1-B are up for renewal for PY'13. Ms. Kelly stated the Committee nominated Richard Blackwell and Burriss Nelson to serve on the

negotiations team. Brandi Runion will recommend to the Finance Committee a final number for the negotiations team to work with for the overall grant. Ms. Kelly reported that the Committee voted to give the negotiations team the authority to finalize the PY'13 Henkels & McCoy for SC Works Operator and the WIA Adult and DW program funder under the Title 1-B budget for the Board's final approval. These two recommendations will be forwarded to the Board for approval.

BOARD ACTION TAKEN: Workforce Skills & Education Committee made a motion to accept the nominations of Richard Blackwell, Burris Nelson and Trent Acker to the PY'13 Budget Negotiation Team as proposed. The motion carried with a unanimous vote.

D.) Finance Committee

David Collins, Finance Committee Chair stated the Committee met on April 17, 2013 and discussed several items. Mr. Collins deferred to Brandi Runion to provide further details.

i. PY'12 Budget Overview

a. Henkels & McCoy

1) Adult/DW Grant – Modification Request

Ms. Runion referred to pages 34-39 which shows a request for a modification from Henkels & McCoy for the Adult/DW grants. This modification is a request to move funds from the DW grant to the Adult grant. This is a lateral move of \$32,097 from the Tuition-College or Vocational line item from DW to Adult. This increases the number of Adult participants by 20 while decreasing the number of DW participants by 20. This also includes moving \$37,440 for the OJT line item from DW to Adult. This increases the number of Adult OJT participants by 26 while decreasing the number of DW OJT participants by 26. The other line items move from DW to Adult based on the percentage of Adult and DW participant to be served. Although the request is to move \$135,109 from DW to Adult, the total amount of the grant does not change. This also comes from a recommendation from the Workforce Skills and Education Committee.

BOARD ACTION TAKEN: Finance Committee made a motion to approve the budget modification request from Henkels & McCoy to transfer \$135,109 from the DW Grant to the Adult Grant and proposed. The motion carried with a unanimous vote.

Ms. Runion referred to page 40 of the meeting packet which shows a snapshot of the Henkels & McCoy grant through March 2013. They are close to their goal of 67.5% of Adult but a little behind on DW due to those participants being served by Trade Assistance.

2) Youth Grant

Ms. Runion referred to page 41 of the meeting packet is a snapshot of the Henkels & McCoy Youth Grant through March 2013 which shows they have spent 63.64% of their goal. This grant is moving along well.

b. WorkLink Grants

1) Adult/DW/Youth Budgets – Modification Request

Ms. Runion referred to page 42 of the meeting packet which is the WorkLink budget through March 2013. Ms. Runion noted there was an Executive Committee email vote on April 15, 2013 to approve moving \$8,055 from undesignated funds to the Equipment line item to purchase a new copier for the WorkLink office. The current machine was purchased in 2008.

Ms. Runion referred to page 43 which is a budget request to move \$212,613 (25%) of the DW program funds to the Adult funds.

BOARD ACTION TAKEN: Finance Committee made a motion to approve the budget modification request from WorkLink staff to set aside 25% or \$212,613 from the DW fund to the Adult fund as proposed; Motion carried with a unanimous vote.

2) Rapid Response & Incentive Grants

Ms. Runion referred to page 45 of the meeting packet which is a snapshot of the 2 Rapid Response Incumbent Worker Training grants that are currently going well.

Ms. Runion referred to page 45 which is a snapshot of the 3 Incentive grants we have received. The 12INC01 grant for \$5,417 was received in late March. This was approved by the Finance Committee and Executive Committee to go towards partial funding of the 2013 Anderson Oconee Pickens Business and Industry Showcase bus transportation.

ii. PY'13 Budget Negotiations & Funding

Ms. Runion referred to pages 46-50 which shows an update on our estimated PY'13 funding. This is an estimate as of March 20, 2013. We are expecting another estimate soon that will update the funding between the 12 regions in SC based on the highlighted items on page 48.

The Youth Council and Workforce Skills and Education Committees have put together their negotiation teams for the PY'13 grants for the Henkels & McCoy grants as noted on page 50. The amounts of these grants are proposed amounts and will be voted on via an email vote to Finance Committee once final estimates are received from the State. An

Executive Committee meeting will need to be held prior to the June 26, 2013 Board meeting to approve the grants in order for the grants to be signed by June 30, 2013

IV. Executive Director Search Committee Update

Stephanie Collins provided an update on the Executive Director search stating the Committee wrapped up the interview process. The Executive Committee will be putting an offer package together and will communicate to the Board once an offer has been made an accepted.

V. 2013 Job Fair

Brandi Runion provided an update on the March 21st, 2013 Job Fair held at Tri-County Technical College Student Center. We had 64 tables set up for Employers/Businesses and had over 500 job seekers participate. Overall, the feedback that has been received from both job seekers and employers was that it was a great success.

VI. Other Business

i. Service Delivery Meeting with SCDEW Update

Chair Brooks reported that DEW announced to the WorkLink region that they will be restructuring the current service delivery structure for Unemployment Insurance on April 9, 2013. This will result in some layoffs from DEW across the State. The Executive Committee is currently evaluating the budget and various options on how to continue delivering services to all three counties. A proposal will be forthcoming.

ii. Department of Labor's Visit.

Chair Brooks reported that the DOL monitored South Carolina Department of Employment and Workforce and the WIA programs in the WorkLink region March 27-29, 2013. DOL was particularly interested in the effectiveness of the Youth Program (which they were complimentary of), the process and procedures regarding co-enrollment of TAA and WIA participants, the Board's interest and utilization of the WorkReady Community Initiative and the role of WorkKeys, and the role of Wagner-Peyser in the SC Works Centers. DOL visited the Seneca Palmetto Youth Connections site in Seneca and the SC Works Center in Anderson. DOL did not have a chance to provide an exit conference for the WorkLink area prior to their departure. We have not received an update on the status of the visit from DOL at this time.

VII. Adjournment

With no further business to discuss, meeting was adjourned.

Respectfully submitted by: Patty Manley, Office Manager



WORKFORCE INVESTMENT BOARD
YOUTH COUNCIL APPLICATION

Applicant Name: Rick Murphy

Applicant Address: 1057 Country Club Road Pickens, SC 29671

Education: BS, MEd Clemson University

Business/Organization: Pendleton Regional Education Center

Job Title: Coordinator

County of Residence: Pickens

Phone: 864-646-1514 Fax:

Cell Phone: 864-419-8031 E-mail: rmurphy1@tctc.edu

Category Represented:

<input type="checkbox"/> Youth Services Agency (Specify)	
<input type="checkbox"/> Juvenile Justice Representative	<input type="checkbox"/> Local D.A. or State's Attorney
<input type="checkbox"/> Local Police or Police Athletic League	<input checked="" type="checkbox"/> Youth Services Agency/Program/CBO
	<input type="checkbox"/> School Superintendent or High School
<input type="checkbox"/> Public Housing Authority (Specify)	
	<input type="checkbox"/> Public Housing Director
	<input type="checkbox"/> Public Housing Administrator
<input type="checkbox"/> Parent	<input type="checkbox"/> Youth
<input type="checkbox"/> Youth Activity (Specify)	
<input type="checkbox"/> Former Participant	<input type="checkbox"/> Local Recreation and Parks Director
<input type="checkbox"/> Local School to Work Director	<input type="checkbox"/> Existing Youth Services for Planning Groups
<input type="checkbox"/> Other - Specify:	
<input type="checkbox"/> One-Stop Manager	<input type="checkbox"/> Social Services Director
<input type="checkbox"/> Adult Education Director	<input type="checkbox"/> Business

Describe how this applicant represents the indicated agency:

Signature Rick Murphy

Date 6/12/13



WORKFORCE INVESTMENT BOARD YOUTH COUNCIL APPLICATION

Applicant Name: Elizabeth (Betsy) W. Burkett

Applicant Address: 100 Vocational Drive
Seneca, SC 29672

Education: M. ED in Special Education

Business/Organization: School District of Special Education

Job Title: Special Needs Transition Facilitator

County of Residence: Oconee

Phone: 1-864-886-4427 Fax: 1-864-886-4426

Cell Phone: 1-864-903-5103 E-mail: bburkett@oconee.k12.sc.us

Category Represented:

☒ Youth Services Agency (Specify)

<input type="checkbox"/> Juvenile Justice Representative	<input type="checkbox"/> Local D.A. or State's Attorney
<input type="checkbox"/> Local Police or Police Athletic League	<input type="checkbox"/> Youth Services Agency/Program/CBO
	<input checked="" type="checkbox"/> School Superintendent or High School

☐ Public Housing Authority (Specify)

	<input type="checkbox"/> Public Housing Director
	<input type="checkbox"/> Public Housing Administrator

☐ Parent ☐ Youth

☐ Youth Activity (Specify)

<input type="checkbox"/> Former Participant	<input type="checkbox"/> Local Recreation and Parks Director
<input type="checkbox"/> Local School to Work Director	<input type="checkbox"/> Existing Youth Services for Planning Groups

☐ Other - Specify:

<input type="checkbox"/> One-Stop Manager	<input type="checkbox"/> Social Services Director
<input type="checkbox"/> Adult Education Director	<input type="checkbox"/> Business

Describe how this applicant represents the indicated agency:

This applicant disseminates information to students, teachers, parents and other school personnel on matters concerning transition that will give the students knowledge they need to set their post-secondary goals and help them connect with agencies and organizations which will help them reach those goals.

Elizabeth W. Burkett
Signature

June 17, 2013

Date



WORKFORCE INVESTMENT BOARD
YOUTH COUNCIL APPLICATION

Applicant Name: Kristi King-Brock

Applicant Address: 120 Sea Palms
 Anderson, SC 29621

Education: 1987, BS-Presbyterian College; 87-89, Worked toward Masters in Education, Clemson University

Business/Organization: Anderson Interfaith Ministries

Job Title: Executive Director

County of Residence: Anderson

Phone: 864-226-2273 Fax: 864-225-0349

Cell Phone: 864-314-6620 E-mail: kristi.king-brock@aimcharity.org

Category Represented:

 Youth Services Agency (Specify)

 Juvenile Justice Representative
 Local Police or Police Athletic
League

 Local D.A. or State's Attorney
 Youth Services Agency/Program/CBO
 School Superintendent or High School

 Public Housing Authority (Specify)

 Public Housing Director
 Public Housing Administrator

 Parent

 Youth

 Youth Activity (Specify)

 Former Participant
 Local School to Work Director

 Local Recreation and Parks Director
 Existing Youth Services for Planning
Groups

 X Other - Specify:

 One-Stop Manager
 Adult Education Director

 X Social Services Director
 Business

Describe how this applicant represents the indicated agency:

As Executive Director, I am responsible for the development of resources for my organization. working with a leadership team to maintain all aspects of the effective daily functions of the organization, program development, ensuring compliance with state and federal laws, fiscal accountability, executing board policy, consulting, and promoting the organization.

 Kristi King-Brock
Signature

 6-19-13
Date



WORKFORCE INVESTMENT BOARD
YOUTH COUNCIL APPLICATION

Applicant Name: Tim Mays

Applicant Address: PO Box 329

Westminster, SC 29693

Education: BS Clemson University

Business/Organization: Blue Ridge Electric Cooperative

Job Title: Key Accounts Manager

County of Residence: Oconee

Phone: 864-647-6647 Fax: _____

Cell Phone: 864-903-5146 E-mail: tim.mays@blueridge.coop

Category Represented: _____

☐ Youth Services Agency (Specify)

<input type="checkbox"/> Juvenile Justice Representative	<input type="checkbox"/> Local D.A. or State's Attorney
<input type="checkbox"/> Local Police or Police Athletic League	<input type="checkbox"/> Youth Services Agency/Program/CBO
	<input type="checkbox"/> School Superintendent or High School

☐ Public Housing Authority (Specify)

☐ Public Housing Director
☐ Public Housing Administrator

☐ Parent ☐ Youth

☐ Youth Activity (Specify)

<input type="checkbox"/> Former Participant	<input type="checkbox"/> Local Recreation and Parks Director
<input type="checkbox"/> Local School to Work Director	<input type="checkbox"/> Existing Youth Services for Planning Groups

☒ Other - Specify:

<input type="checkbox"/> One-Stop Manager	<input type="checkbox"/> Social Services Director
<input type="checkbox"/> Adult Education Director	<input checked="" type="checkbox"/> Business

Describe how this applicant represents the indicated agency:

I interact with large commercial and industrial businesses and have a good feel for the needed skills that young people need to have employment opportunities

Tim Mays
Signature

6/20/2013
Date



WORKFORCE INVESTMENT BOARD
YOUTH COUNCIL APPLICATION

Applicant Name: Crystal Noble

Applicant Address: 603 Walnut Way, Anderson, SC 29626

Business: 104 Maxwell Avenue, Suite 317, Greenwood, SC 29646

Education: BS Biology, Erskine College - 1997; MS Youth Development Leadership, Clemson Univ. - 2010

Business/Organization: Cass Elias McCarter Guardian ad Litem Program

Job Title: Circuit Coordinator

County of Residence: Anderson

Phone: 864-223-4681 Fax: 864-223-5471

Cell Phone: 864-940-6206 E-mail: coble@oepp.sc.gov

Category Represented:

☒ Youth Services Agency (Specify)

<input type="checkbox"/> Juvenile Justice Representative	<input type="checkbox"/> Local D.A. or State's Attorney
<input type="checkbox"/> Local Police or Police Athletic League	<input checked="" type="checkbox"/> Youth Services Agency/Program/CBO
	<input type="checkbox"/> School Superintendent or High School

☐ Public Housing Authority (Specify)

	<input type="checkbox"/> Public Housing Director
	<input type="checkbox"/> Public Housing Administrator

☐ Parent ☐ Youth

☐ Youth Activity (Specify)

<input type="checkbox"/> Former Participant	<input type="checkbox"/> Local Recreation and Parks Director
<input type="checkbox"/> Local School to Work Director	<input type="checkbox"/> Existing Youth Services for Planning Groups

☐ Other - Specify:

<input type="checkbox"/> One-Stop Manager	<input type="checkbox"/> Social Services Director
<input type="checkbox"/> Adult Education Director	<input type="checkbox"/> Business

Describe how this applicant represents the indicated agency:

I am the program coordinator for the Guardian ad Litem program in Greenwood, Abbeville, Laurens, and Newberry counties.

I recruit, train, and supervise volunteer child advocates who speak for children and youth who have been abused or neglected.

Crystal Noble
Signature

June 21, 2013
Date



WORKFORCE INVESTMENT BOARD
YOUTH COUNCIL APPLICATION

Applicant Name: Melvin L. Martin

Applicant Address: 908 ES Sixth Street
Seneca, SC29678

Education: BA

Business/Organization: Seneca Human Affairs Council

Job Title: Executive Secretary

County of Residence: Oconee

Phone: 864.903.5304 Fax: 864.882.1239

Cell Phone: Same E-mail: mrtmmlvn2yahoo.com

Category Represented:

☒ Youth Services Agency (Specify)

<input type="checkbox"/> Juvenile Justice Representative	<input type="checkbox"/> Local D.A. or State's Attorney
<input type="checkbox"/> Local Police or Police Athletic League	<input checked="" type="checkbox"/> Youth Services Agency/Program/CBO
	<input type="checkbox"/> School Superintendent or High School

☒ Public Housing Authority (Specify)

<input type="checkbox"/> Public Housing Director
<input type="checkbox"/> Public Housing Administrator

☐ Parent ☐ Youth

☐ Youth Activity (Specify)

<input type="checkbox"/> Former Participant	<input type="checkbox"/> Local Recreation and Parks Director
<input type="checkbox"/> Local School to Work Director	<input type="checkbox"/> Existing Youth Services for Planning Groups

☐ Other - Specify:

<input type="checkbox"/> One-Stop Manager	<input type="checkbox"/> Social Services Director
<input type="checkbox"/> Adult Education Director	<input type="checkbox"/> Business

Describe how this applicant represents the indicated agency:

Contractor for Resident Services and Youth Program Coordinator

Signature

June 24, 2013

Date

Training Services Group



Executive Summary

WorkLink Youth Program Questions



WorkLink Executive Committee Meeting
June 24, 2013 10:00 a.m.

OVERVIEW

Henkels & McCoy, Inc. (dba - Palmetto Youth Connections) was awarded a contract for Youth Services on October 1, 2006 and has been providing services to At-Risk Out-of-School Youth ages 17-21 in the WorkLink Region since that time. At the onset of the program the focus was for us to address and change the format of services being offered, address the failing Federal Performance Measures, and to provide quality education services to ensure that the many High School Dropouts being served attained their GED or High School Diploma. Second to these primary goals was to initiate and provide Occupational Training and/or Work Experience opportunities that would lead to employment.

Henkels & McCoy, Inc. is proud of the fact that we were able to reach and exceed these initial goals and continually improve our service model by adding new services and by improving the existing services. Our staff has all been with us now in excess of 7 years as we enter our 8th year as a Youth Service provider in the WorkLink Region.

OVERVIEW OF SERVICES & PROGRAM STATISTICS**1) PY13 Cost Per Participant Justification (\$5,243.75) – PY13 Youth Budget \$839,000 to serve 160****a) Historical Statistics****i) Budget vs. Actual Expenditures & Cost Per Participant**

Program Year	BUDGET			ACTUAL			Contract Dates		Status
	Amount	Slots	Cost per	Amount	Slots	Cost per			
PY06 (9 Mo)	\$ 709,932.00	180	\$3,944.07	\$582,012.00	110	\$5,291.02	10/01/06	to 06/30/07	Complete
PY07	\$ 855,042.00	200	\$4,275.21	\$766,864.00	205	\$3,740.80	07/01/07	to 06/30/08	Complete
PY08	\$ 790,000.00	180	\$4,388.89	\$700,187.00	210	\$3,334.22	07/01/08	to 06/30/09	Complete
PY09 (Formula)	\$ 711,000.00	160	\$4,443.75	\$642,442.00	205	\$3,133.86	07/01/09	to 06/30/10	Complete
PY09 (ARRA)	\$ 263,520.00	75	\$3,513.60	\$239,397.00	81	\$2,955.52	07/01/09	to 06/30/10	Complete
PY10 (GTC)	\$ 997,930.00	215	\$4,641.53	\$807,190.00	226	\$3,571.64	07/01/10	to 06/30/11	Complete
PY11 (GTC)									
Note: De-obligated \$30,001.95	\$ 1,110,412.00	198	\$5,608.14	\$925,874.00	220	\$4,208.52	07/01/11	to 06/30/12	Complete
PY12	\$ 850,000.00	155	\$5,483.87	\$686,864.00	160	\$4,292.90	07/01/12	to 06/30/13	YTD
PY13	\$ 839,928.75	160	\$5,249.55				07/01/13	to 06/30/14	

b) Services Provided

- i) Henkels & McCoy, Inc. has been contracted to provide the following services as outlined in the Contract Statement of Work along with a description of time it takes to provide these services to meet and exceed the establish Federal Performance Measures.

ii) Services**(1) Summary of Services Provided****(a) Outreach & Recruitment**

- (i) Orientations, Community Presentations, Coordination with Adult Education & K-12

(b) Assessments

- (i) TABE (Reading & Math Assessment)
(ii) SCOIS (Interest Inventory)
(iii) Aptitude Testing (as needed)
(iv) WorkKeys (For those who enroll)

(c) WIA Eligibility Determination**(d) WIA Program Enrollment****(e) Individual Employment Plan or Service Strategy Development****(f) One-on-One Career Counseling and Coaching****(g) Required Reporting in SC WOS (State Reporting System)****(h) Monthly Monitoring of Records****(i) Monthly Programmatic & Fiscal Reports****(j) Career Smart (Employability Workshops) including;**

- (i) NIOSH Safety

- (ii) Expungement Clinics
 - (iii) Financial Literacy
 - (iv) Parenting Classes
 - (k) Mentoring
 - (l) Supportive Services for Transportation, Childcare, and Emergency Assistance
 - (m) Work Experience (Paid & Unpaid)
 - (n) Placement into Employment, Military, and/or Post-Secondary Education
 - (o) 12 Months of Follow-up
- (2) Outreach & Recruitment
 - (a) 10 Hours Per Week – 25%
- (3) WIA Eligibility Determination, Certification, Assessment, Plan Development, & Enrollment
 - (a) 6 Hours Per Week – 15%
- (4) Active Participant Case Management, Training Services, & Reporting
 - (a) 16 Hours Per Week - 40%
- (5) Placement in Employment and/or Post-Secondary & 12 Month Follow-up
 - (a) 8 Hours Per Week - 20%
- 2) Is our highest goal for our youth a GED? If so, this cost is too high per individual.
 - a) No, our only goal is not GED attainment.
 - b) WorkLink Vision & Mission Statement
 - i) Youth Council Vision
 - (1) “To have youth, educated and prepared for self-sufficiency in work and in life.”
 - ii) Youth Council Mission
 - (1) “The WorkLink Youth Council facilitates collaboration and the delivery of services for youth, leading to educational, workplace and personal success.”
 - iii) Goals:
 - (1) Increase Basic Skills to enable students to complete their Secondary Education and/or become prepared for Post-Secondary Education in Certificate, Diploma, and/or Associates Degree programs in demand occupational areas that lead to above minimum wage jobs.
 - (2) Provide every student with the opportunity to complete their Secondary Education first, if that has not been accomplished when entering the program. Establish an Individual Service Strategy for each student that includes Occupational skills at the Post-Secondary level to obtain a Certificate, Diploma, and/or Associates Degree programs in demand occupational areas that lead to above minimum wage jobs. Plans should include Work Experience opportunities for those students with little to no actual work experience when entering the program.
 - (3) Place every student possible in employment, including the Military and/or Post-Secondary Education. Ensure that a plan is prepared that includes a path back to education if that is not the initial route chosen as many youth that qualify for WIA services need to provide for themselves and live independently.
- 3) What is it we are trying to accomplish?
 - a) The overall goal of Palmetto Youth Connections is to achieve the Vision and Mission of the WorkLink Youth Council and overall Program goals as stated below and addressed above;
 - b) WorkLink Vision & Mission Statement
 - i) Youth Council Vision
 - (1) To have youth, educated and prepared for self-sufficiency in work and in life.”
 - ii) Youth Council Mission
 - (1) “The WorkLink Youth Council facilitates collaboration and the delivery of services for youth, leading to educational, workplace and personal success.”
 - iii) Goals:

- (1) Increase Basic Skills to enable students to complete their Secondary Education and/or become prepared for Post-Secondary Education in Certificate, Diploma, and/or Associates Degree programs in demand occupational areas that lead to self-sufficient wages.
 - (2) Provide every student with the opportunity to complete their Secondary Education first, if that has not been accomplished when entering the program. Establish an Individual Service Strategy for each student that includes Occupational skills at the Post-Secondary level to obtain a Certificate, Diploma, and/or Associates Degree programs in demand occupational areas that lead to above minimum wage jobs. Plans should include Work experience opportunities for those students with little to no actual work experience when entering the program.
 - (3) Place every student possible in employment, including the Military and/or Post-Secondary Education. Ensure that a plan is prepared that includes a path back to education if that is not the initial route chosen as many youth that qualify for WIA services need to provide for themselves and live independently.
- 4) Why are there so many program carry-overs?
- a) In WIA the Program Year runs from July 1st to June 30th annually. We continually are enrolling new participants every week and month throughout the program year. Most of the participants we enroll are High School dropouts, are Basic Skills deficient in Math and/or Reading and possess other barriers such as a Parenting or Pregnant Teen, in or aging out of Foster Care, a Runaway, have legal issues, etc. These barriers define these youth as most in need which is a requirement of the program contract based on the Federal Regulations for services provided with WIA funding. On average it takes 18 months for a participant to complete the program if they stick to their Individual Service Strategy and accomplish the goals that they have established. The menu of services offered under the WIA youth program are self-paced which means that some complete activities quicker than others, but the average time in the program is 18 months and that is why we have carry-overs.
 - b) Client Flow Projections Form – The Client Flow Projections Form has been in place since we began on October 1, 2006. The question was posed then as to what its purpose was and what it exactly measured. No answer has ever been given and no one can explain the form, but we are required to complete it. The numbers reflected in on the Positive and Negative Outcome side of the form are estimates of program performance outcomes that have never been clearly defined. The WIA Youth program follows Federal Regulations that measure performance outcomes using three clearly defined Performance Measures as follows;
 - i) Literacy and Numeracy
 - (1) Of those who are determined to be Basic Skills deficient at enrollment as verified by the TABE Assessment fall in this measure. Basic Skills deficient is considered a grade level of 8.9 or less in Reading and/or Math.
 - ii) Credential Attainment
 - (1) Of those enrolled in training the number that attain a credential (for Youth Secondary Diploma or Nationally Recognized Occupational Skills Credential) by the end of the 3rd Quarter after exiting the program.
 - iii) Placement in Employment and/or Post-Secondary (including Military)
 - (1) Of those not employed at enrollment the number that are placed into employment, military, or post-secondary education (fulltime) during the first quarter after exiting the program.
 - iv) As described in the Federal Performance Measures listed above there is not an individual Positive or Negative measure for the program or scope of services.

5) Caseloads of the Career Coaches

- a) The Career Coaches Caseloads are made up of New Participants that are planned to be enrolled in the new program year, carry-over participants from the previous program and participants in their 12 Month Follow-up Cycle that begins when they exit the active phase of the program.
 - i) Caseload Breakdown
 - (1) 70 Planned Carry-overs (will be adjusted based on the actual number in Oct 13)
 - (2) 90 Planned New Enrollments
 - (3) 61 Planned 12 Month Follow-up Participants
 - (4) 221 Total
 - (5) 4 Career Coaches
 - (6) 55 Total Per Career Coach
- b) Positives & Negatives on the Client Flow Projection Form
 - i) This form does not accurately reflect how WIA Performance is measured by U.S. DOL. There is not an overall Positive or Negative outcome for an individual. A true overall negative would be someone that enrolled in WIA and never yielded any positive outcome, as described in the definitions of the three federal performance measures, but that is not typical.
- c) PY12 – 161 Enrollments & Outcomes (True Negatives)
 - i) How many of the 72 PY12 Carryovers have exited the program?
 - (1) 59 of the 72 Carry-overs have exited the program. Thirteen participants are still active at present, but 10 of those should complete and exit by the end of June 2013. The remaining carry-over participants may continue to be represented on the “active” case load due to continuous self-serving activities initiated in SCWOS under Wagner-Peyser, which causes them to stay open.
- d) Is there a way to reflect out of the 161 total enrolled right now for PY12 if any participants have failed? Failure to me means they were enrolled and did nothing or did not achieve any positives on any youth measure?
 - i) There were 12 out of the 161 participants served that have not achieved any outcome in any of the three Federal Measures or 7%. Two of the 12 were incarcerated and do not count for us or against us.

ATTACHMENT A

STAFF TIME & WIA FEDERAL REGULATIONS & REQUIREMENTS

- (1) Outreach & Recruitment (Makes up at least 25% of Staff Time Weekly – 10 Hours Weekly)
 - (a) H&M is required to provide outreach and recruitment services in order to meet and exceed the enrollment goals set forth in the contract. Over our many years of experience we have found that our staff needs to reach out to at least 100 Youth to find 15 – 20 that they will enroll who they deem suitable and able to complete the goals of the program. As part of this process is federally legislated that we focus on serving those participants who are most in need, meaning they have multiple barriers as outlined in the Federal Regulations and the primary barrier is High School Dropout and basic Skills Deficiencies.
 - (i) To be eligible for services under Title I of the Workforce Investment Act for youth, an individual must meet the following definition.
 1. An eligible youth is defined as:
 - a. An individual who is not less than age 14 and not more than age 21; and
 - b. Is a low income individual, and
 - c. Is an individual who has one or more of the following barriers:
 - d. Deficient in basic literacy skills
 - e. A school dropout
 - f. Homeless, a runaway, or a foster child
 - g. Pregnant or a parent
 - h. And offender
 - i. An individual who requires additional assistance to complete an educational program, or to secure and hold employment, or lacks reliable transportation, or is in need of work-readiness skills.
 - (ii) The following definitions apply to the above eligibility criterion:
 1. Low-Income individual is defined as:
 - a. An individual who receives, or is a member of a family that receives, cash payments under a Federal, State, or local income based public assistance program;
 - b. An individual who received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program involved (exclusive of unemployment compensation, child support payments, payments described in subparagraph (A), and old-age and survivors insurance benefits received under Section 202 of the Social Security Act (42 U.S.C. 402) that , in relation to family size, does not exceed the higher of –
 - i. the poverty line, for an equivalent period; or
 - ii. 70 percent of the lower living standard income level, for an equivalents period;
 - c. An individual who is a member of household that receives (or has been determined within the 6-month period prior to application for the program involved to be eligible to receive) food stamps pursuant to the Food Stamp Act of 1977 (7 U.S.C. 2011 et seq.);
 - d. An individual who qualifies as a homeless individual, as defined in subsections (a) and (c) of Section 103 of the Stewart B. McKinney Homeless Assistance Act (42 U.S. C. 11302);

- e. An individual who is a foster child on behalf of whom State or local government payments are made; or
 - f. In cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own income meets the requirements of a program described in subparagraph (A) or of subparagraph (B), but who is a member of a family whose income does not meet such requirements.
- (iii) Deficient in Basic Literacy Skills is defined as:
 - 1. An individual who is determined to compute or solve problems, read, write, or speak English at or below grade level 8.9; or
 - 2. An individual who is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society.
- (iv) School dropout is defined as:
 - 1. An individual who is no longer attending any school and who has not received a secondary school diploma or it has recognized equivalent.
- (v) Offender is defined as:
 - 1. Any adult or juvenile-
 - a. who is or has been subject to any stage of the criminal justice process, for whom services under this ACT may be beneficial; or
 - b. who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.
- (vi) Individual who requires additional assistance to complete an educational program, or to secure and hold employment is defined as:
 - a. This definition is the Youth Plan Section of the Local Plan.
- (vii) Out of School Youth is defined as:
 - a. An eligible youth who is a school dropout; or
 - b. An eligible youth who has received a secondary school diploma or its equivalent but is basic skills deficient, unemployment and under-employed.
- (2) **WIA Eligibility Determination, Certification, Assessment, Plan Development, & Enrollment (Makes up at least 15% of Staff Time Weekly – 6 Hours Weekly)**
 - (a) Every participant that applies for WIA services must be scheduled for a Certification and Eligibility Appointment to meet one-on-one with staff. These appointments generally take 2 hours, if the individual has all of their documentation. During this meeting staff goes through the WIA Application and determines WIA Eligibility in SC WOS (state reporting system). WIA Suitability is assessed and the Objective Assessment determines what needs the participant has that will make up their Individual Employment Plan (IEP) or Individual Service Strategy (ISS). Our students have multiple barriers as mentioned above. It is staff's job at this phase to identify all of the barriers so that we may address them for each individual.
 - (i) Assessments
 - 1. Prior to the appointment applicants for services are referred to Adult Education to take the Test for Adult Basic Education (TABE) to determine if they are Basic Skills Deficient or not as define above.
 - 2. Prior to the appointment applicants are also asked to complete the SCOIS Interest Inventory to determine what their occupational interests are to facilitate developing a plan.
 - (ii) Enrollment & Plan Development
 - 1. If the Participant is deemed eligible and suitable for the program the Career Coach proceeds with enrollment. The Enrollment process takes another 1-2 hours of time depending on the individual's needs.

- a. If someone is not eligible, not suitable, or not interested staff offer to refer them to other community services based on their needs.
- (3) **WIA Youth 10 Elements from the Regulations**
 - (a) § 664.410 Must local programs include each of the ten program elements listed in WIA section 129(c)(2) as options available to youth participants?
 - (i) Yes, local programs must make the following services available to youth participants:
 1. Tutoring, study skills training, and instruction leading to secondary school completion, including dropout prevention strategies;
 2. Alternative secondary school offerings;
 3. Summer employment opportunities directly linked to academic and occupational learning;
 4. Paid and unpaid work experiences, including internships and job shadowing, as provided in §§ 664.460 and 664.470;
 5. Occupational skill training;
 6. Leadership development opportunities, which include community service and peer-centered activities encouraging responsibility and other positive social behaviors;
 7. Supportive services, which may include the services listed in § 664.440;
 8. Adult mentoring for a duration of at least twelve (12) months, that may occur both during and after program participation;
 9. Follow-up services, as provided in § 664.450; and
 10. Comprehensive guidance and counseling, including drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth.
 - a. Local programs have the discretion to determine what specific program services will be provided to a youth participant, based on each participant's objective assessment and individual service strategy. (WIA sec. 129(c)(2).)
 - (b) Henkels & McCoy, Inc. provides all of the Ten Elements listed above as part of our program based on each individual's needs as assessed by the Career Coach during the course of the program.
- (4) **Active Participant Case Management, Training Services, & Reporting (Makes up at least 40% of Staff Time Weekly – 16 Hours Weekly)**
 - (a) H&M is required to provide holistic case a management to every participant served. In order to successfully serve at-risk out-of-school youth the Career Coach has to meet with the participant multiple times during the month. We have strategically placed our Career Coaches in the Adult Education Centers as most of our participants are high School Dropouts and need to attain their GED or High School Diploma. This allows the Career Coach to monitor their participants weekly, if not daily.
 - (b) H&M Staff is required to do a significant amount of administrative tracking to verify all of the services being provided. Everything is tracked in the state reporting system and items that cannot be tracked there are tracked through proprietary software that H&M provides. Career Coaches enter detailed case notes on each participant, they meet monthly to review their IEP or ISS to ensure they are on track, they track weekly training attendance, they write vouchers for Occupational Skills Training, and they write vouchers for Transportation and Childcare as needed.
 - (c) Training Services are provided based on each individual's needs and goals as outlined in their IEP or ISS. Short Term Occupational Skills Training is provided through Vouchers given to the participant for training at eligible training providers as certified by the state and local WIB. A variety of training is offered and must be with in the pre-determined Occupational Clusters as approved by the WorkLink WIB. Participants are all required to attend our Career Smart Employability Skills Training that includes, NIOSH Safety

Course, Financial Literacy, Job Applications, Resume Writing, Interviewing Techniques, Work Attitudes & Dress, Expungement Clinics, FAFSA Workshops and more. Staff provides Basic Skills Tutoring access to our participants utilizing Skills Tutor Software provided by H&M. Staff sets up Mentoring services for participants as needed through a partnership with Ripple of One. Parenting classes are offered to those pregnant and parenting teens being served. There are many more services offered through community collaboration by a referral process to get each participant to the right service as needs arise. Staff strongly encourage our youth to look at 2 year degree programs as they all qualify for Pell and Lottery funding.

- (d) H&M Management report out monthly to the WorkLink WIB Staff and the Youth Council and provide a Performance Dashboard Report as well as a Budget versus Actual on year to date expenditures.
- (5) **Placement in Employment and/or Post-Secondary & 12 Month Follow-up** (Makes up at least 20% of Staff Time Weekly – 8 Hours Weekly)
 - (a) Our Career Coaches and Workforce Specialists work together to identify employment opportunities for our participants that are going to go directly into employment out of the program. Most of the youth we serve have little to no work experience and we utilize Work experience initiatives to provide that experience with local areas businesses and have done so successfully. Many are interested in going on to Post-Secondary and do enroll in 2 year programs or on part-time basis. Unfortunately the many of the youth we serve do not have type of family support mechanisms and need to work even if they go to school fulltime. We facilitate both needs and desires by assisting them with employment while helping them enroll in post-secondary education. The outcomes collected in SC WOS often show up as Employment because their wages hit before we can record the entry into Post-Secondary Education so the placement reports may reflect lower level employment, but what is missing is their enrollment into post-secondary education.
 - (b) The Career Coaches provide 12 months of monthly follow-up services to each participant enrolled in the program and assist them with barriers and challenges that may occur during this time. Often times we assist in finding more than one employment opportunity for our youth after they exit the program.

**WorkLink Youth Performance Summary
PY10, PY11, & PY 12 (YTD)**

Literacy & Numeracy

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	45.00%	67.00%		7/1/10 to 6/30/11	Number enrolled one year prior that are basic skills deficient
PY11	45.00%	69.00%		7/1/11 to 6/30/12	
PY12	67.30%	59.10%	Meeting	7/1/12 to 6/30/13	Thru 3rd Quarter (80% of Goal is Meeting)

Calculation & Definition

Number who increase one or more educational functioning levels in lit or num

Number who completed a year of participation

+

Number who exit before completing a year of participation

Credential Attainment

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	55.00%	73%	Exceeded	10/1/09 to 9/30/10	
PY11	55.00%	62%	Exceeded	10/1/10 to 9/30/11	
PY12	77.70%	82%	Exceeded	10/1/11 to 9/30/12	Thru 3rd Quarter

Calculation & Definition

Of those enrolled in education at participation or any time during the program:

Number attaining a diploma, GED or certificate by the end of the 3rd quarter after exit

Number of exiters

	GED	HS Diploma	Occupational Skills Credentials	Total
PY10	61	25	28	114
PY11	81	11	27	119
PY12	58		23	81
Total	200	36	78	314

Placement in Employment and/or Post-Secondary

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	61.00%	72%	Exceeded	10/1/09 to 9/30/10	
PY11	61.00%	76%	Exceeded	10/1/10 to 9/30/11	
PY12	67.30%	79%	Exceeded	10/1/11 to 9/30/12	Thru 3rd Quarter

Calculation & Definition

Of those who are not in any of the following at date of participation - post-secondary education, employment, or the military:

Number of participants in employment or the military or enrolled in post-secondary education and/or advanced training/occupational skills training in the quarter after exit

Number of exiters

	Placed	Counted in Measure		
PY10	63	88	72%	20 Post Secondary
PY11	87	114	76%	9 Post Secondary
PY12	74	94	79%	3 Post Secondary
TOTAL	224	296		

Business Partnerships Committee Report

Presented June 26, 2013 – Board Meeting

Work Ready Communities Initiative

As of mid-May, all 46 counties in SC are Work Ready Communities In-Progress making South Carolina's participation 100%. In an update from Ms. Kovacs, they are still waiting on the contract to be signed for funding.

Business Services Integration Team

Meeting on a monthly basis and working on a strategic way to outreach to and serve employers and business in our services area without duplicating one another's efforts. As part of the outreach planning, the BSIT is working on a flyer to be given to employers and businesses to address general questions and who or which agency they would contact for assistance

Proposed Business/Employer Services Metrics

The State is proposing a set of Business/Employer Services Metrics to report out to us in an effort to assist us in making judgment calls on how to improve/change our business/employer strategies to make a better impact in our service area. They would like to see us increase the number of employer services being provided through the Centers and the SCWOS online system; they are looking at what we're actually doing to fill jobs in our service area and what our success rate is as well as looking for what our Centers are actually doing as far as reporting out services such as job openings, hiring events, job fairs, etc. The State is proposing to send this information monthly, if so, the information will be available to be included on the Operator's SC Works Dashboard report.

Next Business Partnership Committee Meeting

Scheduled for July 11th.

PY 12 Program Intake Chart

Attended Orientation:	Everytime an orientation is completed number is tracked - number is cumulative throughout a program year
Returned Applications:	CC marks each time a "full" package is returned. Full package equal all documents are present to determine eligibility
WIA Eligible:	Status of each certification completed whether "enrolled" or not

PY12 Total Served

Pie chart that shows the break out of carryover vs new

Carryover = anyone active anytime this PY with a start date prior to 7/1

New = any person enrolled after 6/30

PY12 Caseload Breakdown

Pie chart that show the break out of all CO and New per Career Coach

PY12 Demographics

Graphical depictions of CO and New chosen demographics

PY12 Training Programs

Bar graph of training programs based on participants in training this Program Year

PY12 Providers

Bar graph of training providers based on participants in training this Program Year

PY12 GED Providers

Bar graph of GED providers based on participants in training this Program Year

OJT

Chart of requested OJT information (based on contracts written this Program Year)

Attendance of Core Workshop

Sum of each workshop attendance split out by WP or WIA and Totaled

SC WORKS WORKLINK

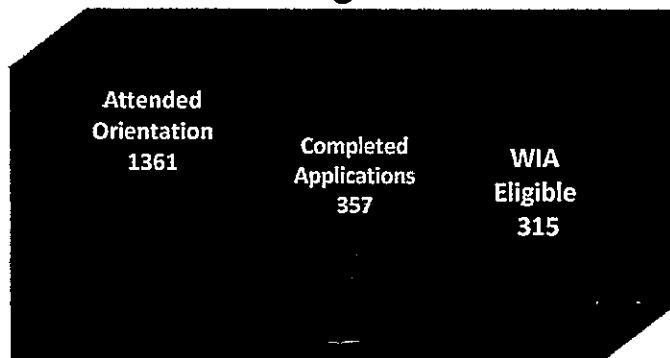
BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER

ANDERSON-OCONEE-PICKENS

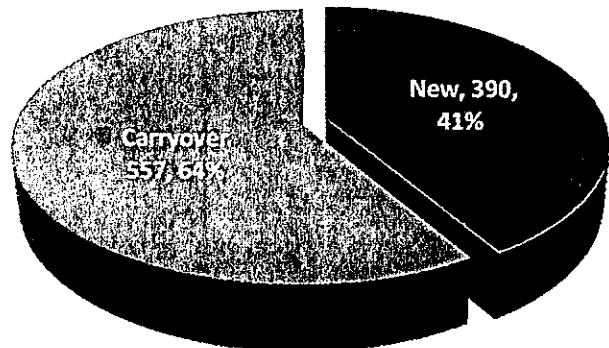
Program Year 12 (July 1, 2012 - June 30, 2013)

Report Last Saved: 6/7/2013

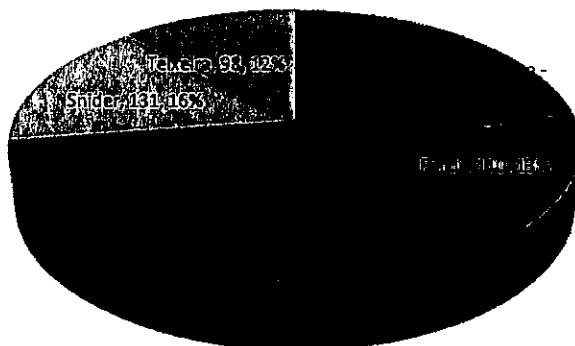
PY12 Program Intake



PY12 Total Served

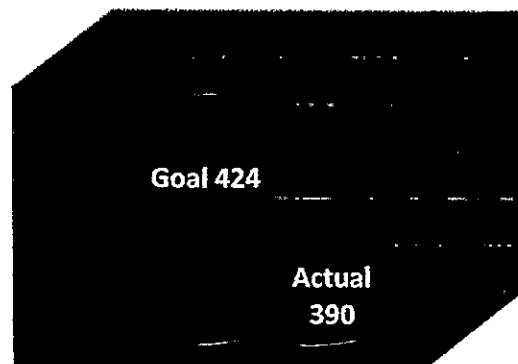


Caseload Breakdown

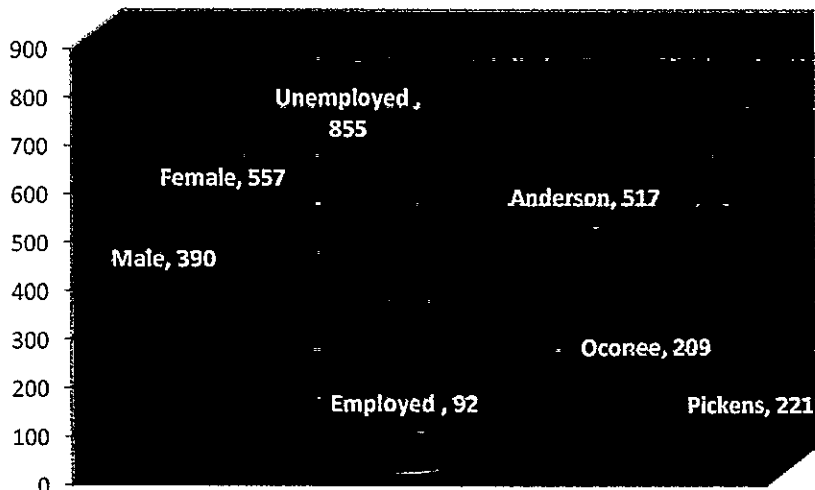


Caseload count includes Carryover and New

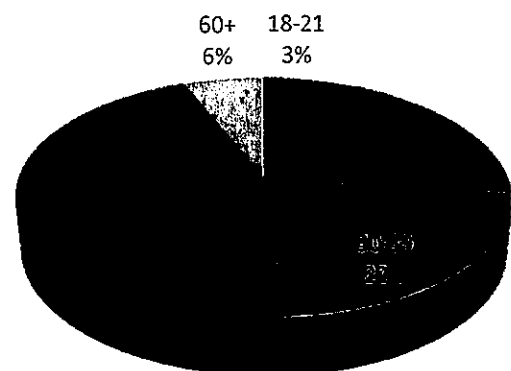
New Enrollments



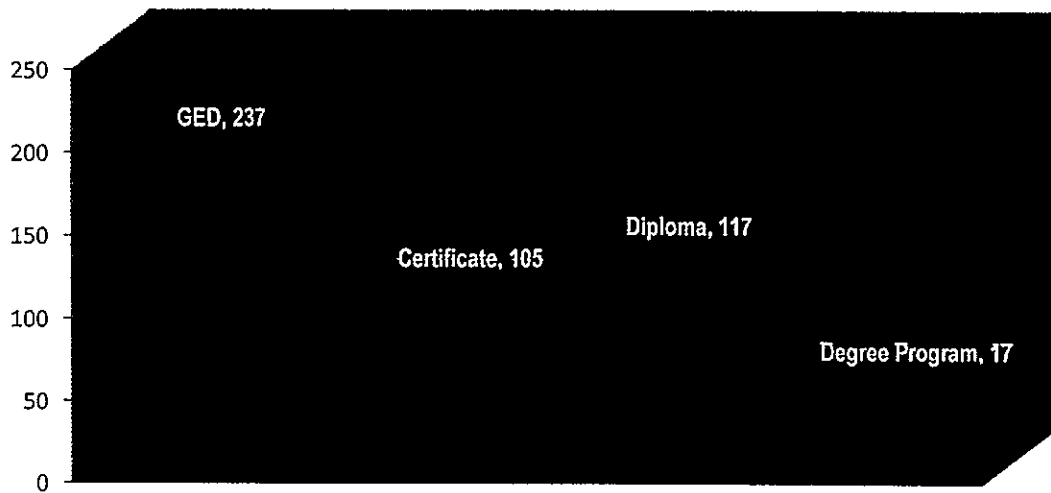
PY12 Demographics



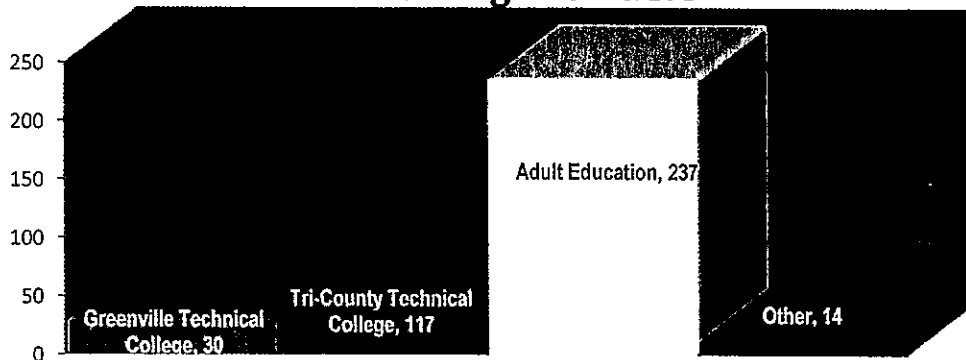
Age Ranges of Total Served



Training Programs



Training Providers



On -Job-Training

Businesses	Number of Contracts	Total Contract Value	Hourly Rate	% of Wage	Total Hrs	% Successful
MTS Office Machines	1	\$3,600.00	\$10.00	75%	480	100%
Borg Warner	3	\$11,628.80	\$13.83	49%	1680	100%
King Asphalt	2	\$4,928.25	\$10.00	75%	400	100%
Fastech	1	\$3,960.00	\$11.00	75%	480	0%
First Quality Tissue	2	\$6,278.40	\$13.08	50%	960	100%
Lakeside Steel & Machine	4	\$10,728.00	\$12.25	78%	1176	100%
Belton Metals	1	\$3,000.00	\$10.00	75%	400	100%
TrailerLogic LLC	1	\$5,940.00	\$11.00	75%	720	100%
US Engine Valve	6	\$18,372.00	\$14.60	50%	560	100%
Pittman Heating & Air	1	\$3,960.00	\$11.00	75%	480	100%
National Business Services Inc-Print III	1	\$4,590.00	\$13.91	75%	440	100%
Crowe's Corporate Promotions-Monogram Me	1	\$3,630.00	\$11.00	75%	440	100%
Upstate Medical Staffing	1	\$3,648.00	\$13.00	75%	440	100%
W.E. Black Termite & Pest Control	3	\$10,279.00	\$11.25	75%	890	100%

Attendance of Workshops Offered

	WP	WIA	Total
Resume Writing	33	46	79
Resume Writing: Part 1, Preparation	3	15	18
Resume Writing: Part 2, Writing	3	11	14
Basic Resumes Made Easy	11	9	20
Resume Writing Beyond the Basics	8	10	18
Winning Job Applications/Online Job Applications	20	17	37
Internet & Job Search	10	12	22
Job Interviews & Successful Interviews	89	101	190
Successful Job Interviews & Networking	39	20	59
Fast Tracking Your Job Search	2	6	8
Preparing for A Job Fair	38	3	41
Doing More with Less	4	7	11
Financial Aid	1	1	2
Expungement & Pardons Workshop	58	14	72
Computer basics	13	18	31
Quick Start for New Computer Users	16	6	22
Computers: Mousing & Basic Keyboarding	2	5	7
Email for the Absolute Beginner	7	7	14
Using Microsoft Word	4	4	8
Quick Start - Word	15	5	20
Quick start - Excel	19	7	26
	395	324	719

SC WORKS WORKLINK

BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER

June 20, 2013

Mr. Rick Sutliff
Henkels & McCoy, Inc.
2005 North Main Street
Anderson, SC 29621

Subject: PY'12 Monitoring Report – SCWorks Center Operator and Adult/DW WIA Program

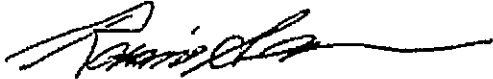
Dear Mr. Sutliff:

During the period of April 22 through April 26, 2013, staff members of the WorkLink Workforce Investment Board (WIB) conducted the Workforce Investment Act (WIA) monitoring review of the region's SC Works Centers located in Anderson, Liberty and Seneca, and the Adult and Dislocated Worker WIA program.

The purpose of the review was to determine the adequacy of the systems in place to ensure compliance with the WIA and TAA statutes and applicable regulations and guidelines. As a result of the monitoring visit, several observations were noted, some of which require corrective action. A written response to this report is required within thirty (30) days of the date of this letter.

Thank you for the courtesy extended to our staff. The cooperation and assistance offered during the monitoring was most helpful. If you have questions, or if we can be of assistance, please contact Jennifer Kelly at (864) 646-5898, or via email jkelly@worklinkweb.com.

Sincerely,



Ronnie Allen
Executive Director, WorkLink Workforce Investment Board

Cc: Stan Brooks, WorkLink WIB Chair

Programmatic Monitoring/Technical Assistance
PY'2012 Monitoring

On-Site Programmatic Review: Apr 22 – Apr 26, 2013

Service Provider: Henkels & McCoy, Inc

Contracts:

12A995H1 & 12D995H1 – WIA Title 1 Adult and DW

Referred to as “Adult and DW grant” in this document

I. REVIEWERS

Jennifer Kelly, jkelly@worklinkweb.com, 864-646-5898
Windy Graham, wgraham@worklinweb.com, 864-646-1826

SERVICE PROVIDER CONTACT PERSON

Ms. Dana Grant, dgrant@henkels.com, 864-634-1067

II. SCOPE OF MONITORING

On-Site Monitoring was conducted during the week of April 22 – April 26, 2013 to review programmatic activities for the period May 31, 2012 – April 26, 2013 to determine the adequacy of the systems in place and to ensure compliance with Workforce Investment Act of 1998 (WIA), its regulations, contractual agreements and operations, as well as co-enrollment procedures with TAA.

III. METHODOLOGY

WIB Staff reviewed Henkels and McCoy’s contract for compliance with the following: Federal Regulations, State and Local Board policies and procedures, grant awards, and financial procedures. During the visit, a variety of methods were used to determine the success of the grants: Walk-through and observation, survey, workshop audits, and file and database review. Technical Assistance was provided during the review period.

IV. REVIEW PROCESS

Programmatic monitoring was performed for the period of May 31, 2012 – April 26, 2013 for the contractual agreement between May 31, 2012 and June 30, 2013. In addition to staff interviews and workshop audits, 55 files were reviewed from the three WorkLink region SC Works Centers to review proper documentation of all levels of service and for compliance with the file management policy. Ongoing desktop review was conducted.

Due to the limited scope of the monitoring, there may be issues that exist that are not addressed in this report.

V. OBSERVATION(S)

1. **TABE Test** – The State monitored the intake process in the fall of PY12. In their monitoring report to WorkLink, the State recommended that the Adult/DW program intake process be revised to move the TABE test from before eligibility determination to after. In response to their recommendation, WorkLink requested technical assistance in order to understand the source of the violation. The State referenced TEGl 17-05, page 29, “Significant Staff Involvement.” WorkLink observed the intake process during the monitoring period and has evaluated the situation.

Recommendation – In order to ensure that all individuals have the right to apply for WIA under Core Services, Henkels and McCoy should implement the following:

For those 18 to 21 -

1. TABE test
2. Eligibility Determination
3. Enrollment

For those 22 and older -

1. Eligibility Determination
2. TABE test
3. Enrollment

2. **Employer Services** –The Operator’s role is to coordinate the partners within the SC Works Centers to provide the best level of service available to both job seekers and employers. Employer Services is a vital part of the SC Works Centers’ function.

Recommendation - Upon observation of processes taking place in the SC Works Centers and discussions with community partners, Henkels and McCoy should collaborate with the DEW Regional Manager in order to implement the proscribed employer services as outlined in the Statement of Work, and as directed by the WIB staff. Henkels and McCoy’s role in the employer services arena is to *coordinate* employer related-activities in the Centers and at SC Works hosted events. The Business Lead appointed by the WorkLink WIB will be responsible for ensuring that the Business Services Team is setting appropriate goals and plans for employer services for the Centers. Henkels and McCoy should appoint one representative from the management staff to serve on the Business Services Team (all other Henkels and McCoy Business Service Representatives employed through this grant are expected to serve as a team member). Henkels and McCoy’s focus *should not* be on business development outside of On-the-Job Training, but rather on ensuring quality employer services are being provided in the SC Works Centers.

3. **Participation Levels** – As outlined on page 48 of the Statement of Work for Henkels and McCoy, the following chart shows the county fair share percentages:

Adult Program:	Anderson County	51%
	Oconee County	19%
	Pickens County	30%
Dislocated Worker Program:	Anderson County	48%
	Oconee County	18%
	Pickens County	34%

As of 5/31/13:

- Adults/DWs participated this program year: 937 Total – 520 (55.49%) Anderson, 199 (21.23) Pickens, and 218 (23.26%) Oconee.
- Adults/DW enrolled since 07/01/2012: 383 Total – 213 (55.61%) Anderson, 87 (22.71%) Pickens, and 83 (21.67%) Oconee.
- Of the 424 new enrollments, 383 have been completed (90.5%)

Recommendation – WorkLink serves three counties with unique needs. Henkels and McCoy should serve these counties based on county fair share ratio. Training and supportive service funds will theoretically follow the participant; therefore, Henkels and McCoy should allot participant level numbers to each county. This will ensure that each county’s residents have access to the WIA funds that we receive. Outreach and funds available to businesses for OJT should also follow the county fair share ratio as well.

4. **OJT training plan** – OJT Training plans lacked identified benchmarks for evaluating performance. WorkLink staff evaluated an OJT contract and found there were no specific timelines that outlined measurable benchmarks for learning skills needed to perform the job effectively.

Recommendation - The OJT training plan is used to outline the specific skill requirements and training approach to be used in an employer-based training. It should also be used as an assessment tool to help document which skills the trainee lacks at the start of training and to record the measurement of skill attainment during the course of training. Specific proficiencies and skills to be learned, measurable indicators of successful performance, and estimated number of hours of training

needed to learn each skill should be clearly identified and outlined in the OJT training plan.

OJT staff is encouraged to complete detailed training plans. Doing so will make the evaluation process easier when determining if the OJT participant mastered all the necessary skills to remain employed with the specific employer. There are helpful resources to aid in planning and implementing an effective OJT program. Training modules, template documents and effective marketing strategies can be found at <https://ojttoolkit.workforce3one.org/>.

5. **File Review** – WorkLink staff reviewed 55 files for compliance with the statement of work. Staff observed the following issues:
 - a. **Case notes** – Case notes do not capture the details of each interaction with an individual, whether employer or jobseeker. Case notes should detail important (non-discriminatory and non-sensitive) facts about the employer services delivered or career counseling services provided, and the interactions that take place between the individual and the staff member. In addition to this each, WIA staff member should enter his or her own case notes; no one else should enter a case note on behalf of another staff member.
 - b. **IEPs** – The statement of work requires that all Individual Employment Plans (IEPs) be reviewed every 90 days. WorkLink staff observed numerous IEPs that were expired.

Required Action – All staff's case notes and expired IEPs are to be reviewed and corrected. Management should arrange for training for those staff members with deficiencies, including the Workforce Development Specialist (regarding case notes).

Reference – PY'12 Henkels and McCoy, Statement of Work, page 31, "Case Notes."

V. FINDING(S)

There were no findings at this time.

**Financial Monitoring/Technical Assistance
PY'2012 Monitoring**

On-Site Financial Review: April 22 - 26, 2013

Service Provider: Henkels and McCoy, Inc

Contracts:

12A995H1 & 12D995H1 – WIA Title 1 Adult and DW

Referred to as "Adult and DW grant" in this document

I. Reviewer:

Brandi Runion, brunion@worklinkweb.com, 864-646-1827

Service Provider Contact Person:

Kal Kunkel, kkunkel@henkels.com 843-574-1843

II. SCOPE OF MONITORING

An on-site Financial monitoring was performed April 22 - 26, 2013 to review accounting records for the period May 31, 2012 – April 26, 2013 to determine the adequacy of the systems in place and to ensure compliance with Workforce Investment Act of 1998 (WIA), its regulations, contractual agreements and operations.

III. METHODOLOGY

The methodology for monitoring this WIA program included a review of appropriate WIA regulatory references and the Service Provider's contractual agreement. Reported costs are compared to booked cost by examining detailed expenditure reports, trial balances or general ledgers. An analysis of salaries/fringes are reviewed against time sheets and accounting records to ensure that staff time and expenditures are properly allocated to appropriate programs and cost categories. A review of source documentation to support accounting records and systems was performed to validate the tracking of funds at a level of adequate in establishing that funds have not been used in violation of any Federal, State, or local laws, Act Regulations, policies and procedures.

IV. REVIEW PROCESS

An on-site financial monitoring was performed for the period of May 31, 2012 – April 26, 2013 for the contractual agreement between May 31, 2012 and June 30, 2013. A random sampling review of ETO data as compared to participants' files was performed and validated. A random sampling of participants' files was also reviewed to ensure that the proper supporting documentation was in the files and they were in compliance with instructions.

Due to the limited scope of the monitoring, there may be issues that exist that are not addressed in this report.

V. OBSERVATION(S)

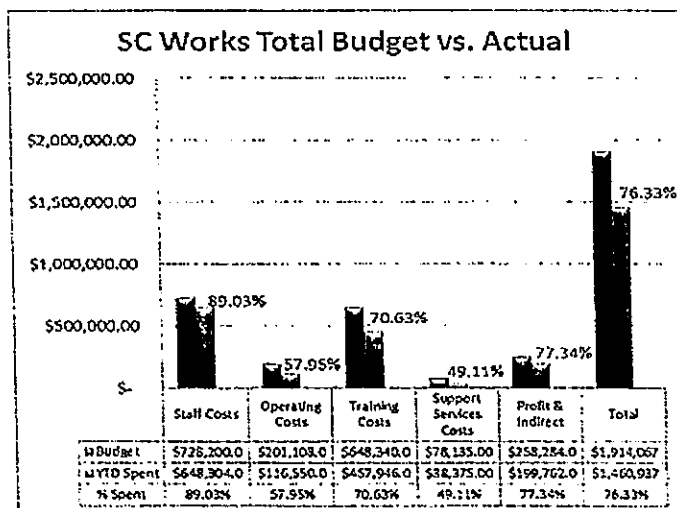
1. **Itemized Receipts** – Some meal receipts were not itemized that were charged to the grant.

Recommendation - Itemize all meal receipts if they are going to be charged to WIA.

2. **Efforts-to-Outcomes Report** – The ETO report for OJT as well as ITAs was not accurate. Several errors were found where ITAs were filled out and training had begun as well as contracts were written for OJT but no information was put into ETO, therefore, showing an inaccurate lower obligations number.

Recommendation - The Workforce Specialist and/or Area Manager receive training to be able to maintain the accuracy of the OJT obligations without going through a third party staff member, and review the ITA obligations report for accuracy. Obligations for OJT should be entered into ETO before the training begins.

3. **Expenditures** - As of the May 26, 2013 expenditures, Henkels and McCoy has spent 76.33% of their grant. The goal through May 2013 is \$1,754,561.49 or 92%. Per the Statement of Work, Henkels & McCoy should spend at least 90% of their grant by June 30, 2013.



Recommendation - Expenditures are a little behind the goal. Henkels and McCoy should continue to monitor expenditures and adjust accordingly.

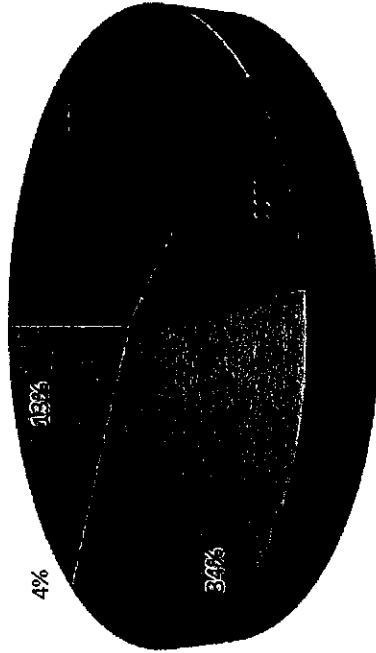
VI. FINDING(S)

There were no findings at this time.

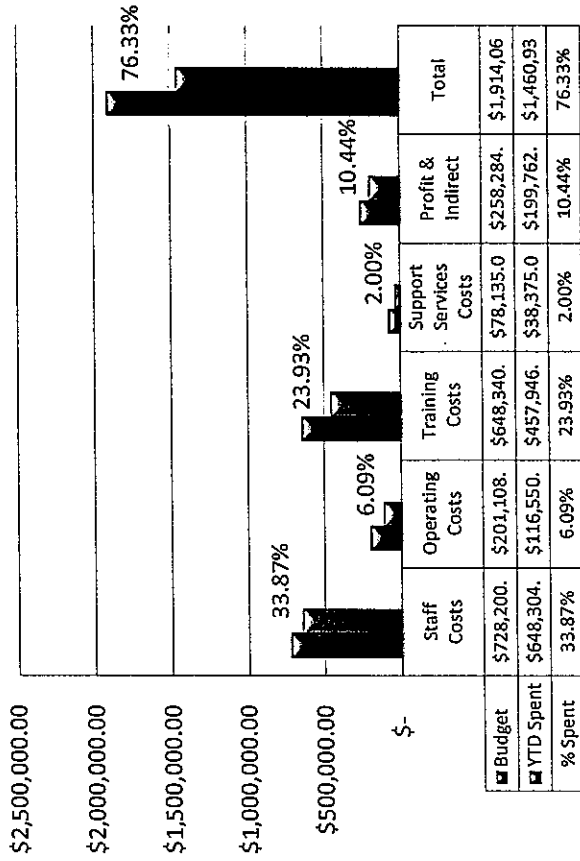
SC WORKS OPERATOR BUDGET (Mod# 3) - 7/1/12 to 5/26/13

SC Works Total Budget

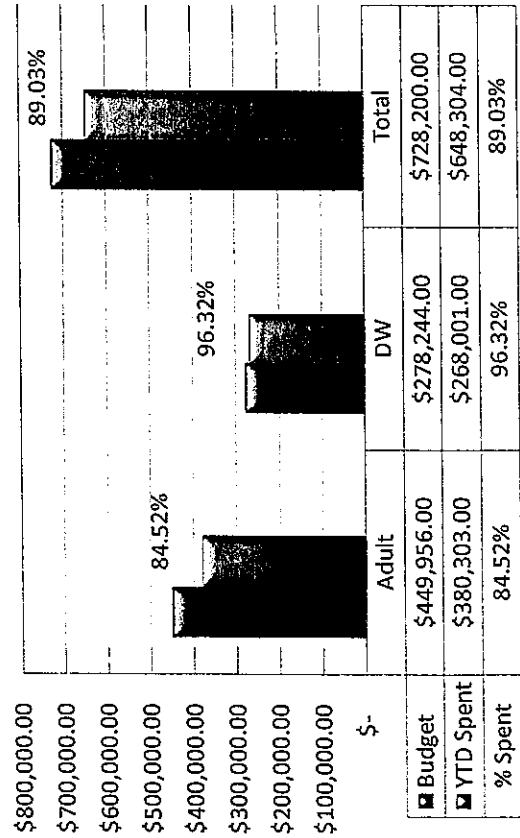
- Staff Costs
- Operating Costs
- Training Costs
- Support Services Costs
- Profit & Indirect



SC Works Total Budget vs. Actual

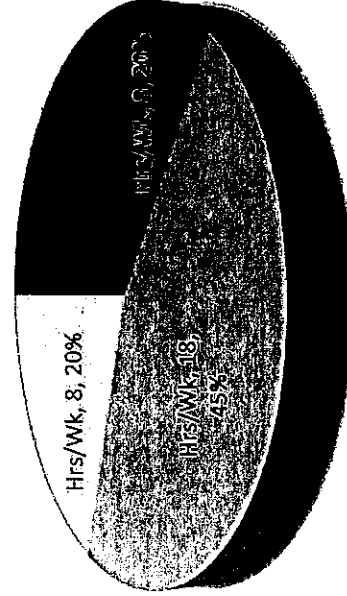


SC WORKS Staff Costs



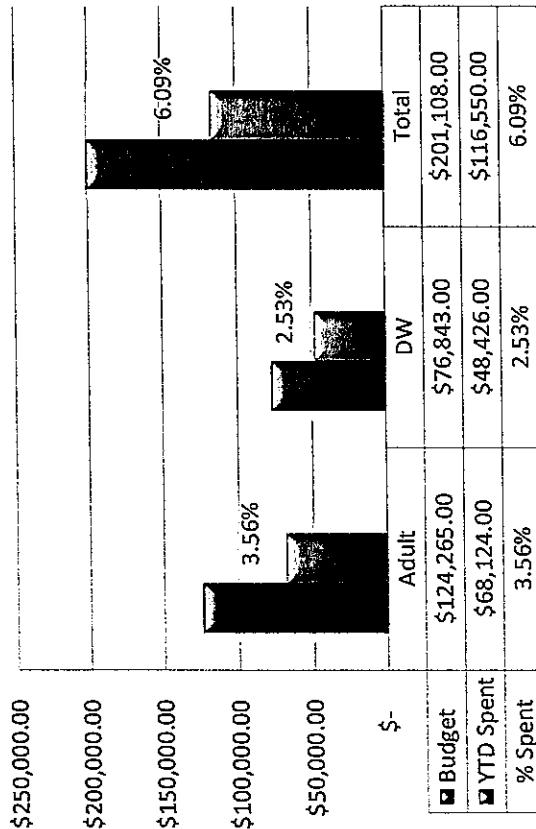
Staff Time Split

- Core
- Intensive
- Training
- Follow-up

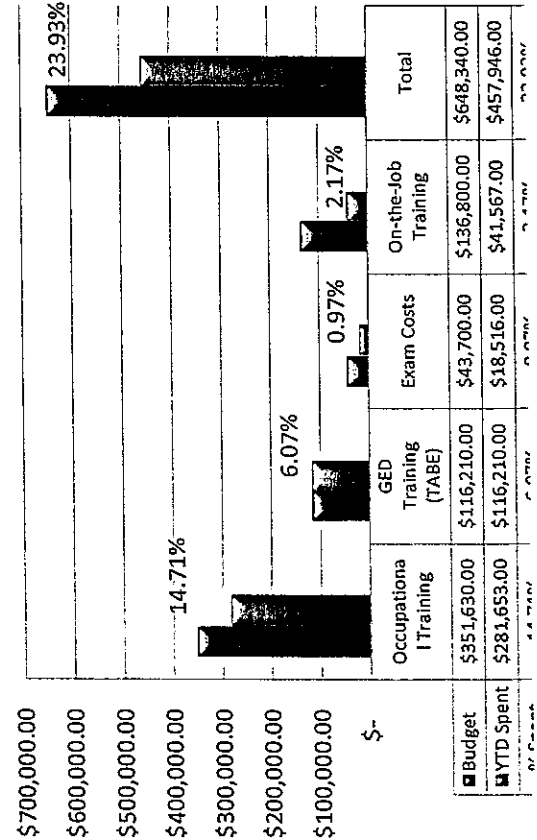


SC Works Operating Costs

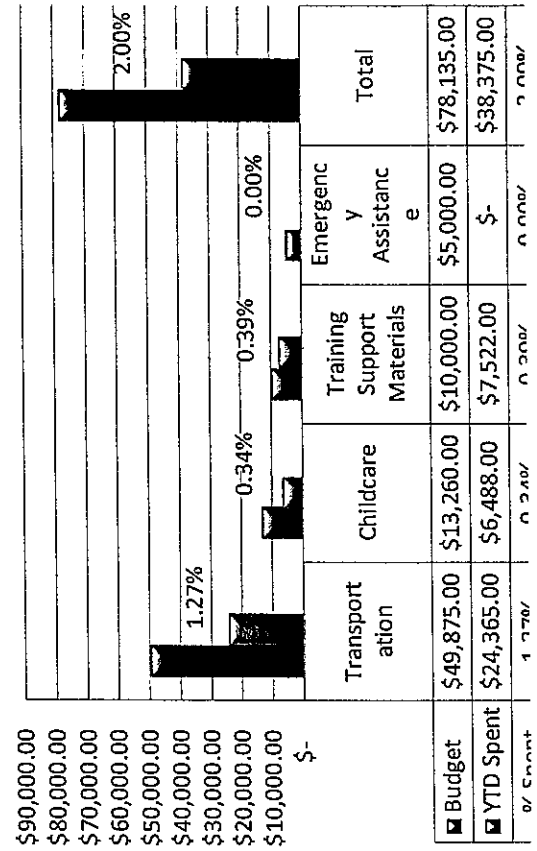
(Note: No Facility Costs have been spent YTD)



SC Works Direct Training Costs



SC Works Support Service Costs





Worklink Workforce Investment Board Grant #12A995H1&12D995H1

Budget vs. Actual Expenditures YTD

codes	ADULT					DLW					TOTAL				
	ADULT	1300-I1024	Total Expenses	Balance	% Spent	DLW	DLW	1300-I1025	Total Expenses	Balance	% Spent	Total Budget	ADULT&DLW	Total Balance	Total % Spent
MOD43 4/24/13	Budget	4/29-5/28				Budget	Budget	4/29-5/28					TO DATE		
Salary Total	315,202	24,910	292,366	22,890	92.74%	194,992	194,992	13,973	208,114	(11,162)	105.73%	510,214	488,480	11,734	97.70%
Fringe Benefit Total	134,694	10,741	87,937	46,757	65.29%	83,292	83,292	5,642	61,887	21,405	74.30%	217,986	149,824	68,162	68.73%
Subtotal	\$449,896	\$35,651	\$380,303	\$69,653	84.52%	\$278,244	\$278,244	\$19,555	\$268,001	\$10,243	95.32%	\$728,200	\$648,304	\$79,896	89.03%
Operating Costs															
Facility TQTC	39,766	1,423	19,875	19,891	49.98%	24,591	24,591	733	14,095	10,496	57.32%	64,357	33,970	30,387	52.78%
Staff Consumable Sup	14,459	410	8,018	6,441	55.45%	8,941	8,941	207	5,757	3,184	64.39%	23,400	13,775	9,625	58.87%
Advertising	13,792	15	3,444	10,348	24.97%	8,528	8,528	9	2,494	6,034	29.24%	22,320	5,938	16,382	28.60%
Printing/Copies	7,415	710	3,490	3,925	47.07%	4,585	4,585	429	2,482	2,123	53.70%	12,000	5,952	6,048	49.60%
Communications	12,385	596	7,908	4,477	63.85%	7,659	7,659	340	5,126	2,533	66.93%	20,044	13,634	6,410	65.03%
Staff Travel	20,721	1,312	16,688	4,033	80.54%	12,813	12,813	755	12,049	764	94.04%	33,534	28,737	4,797	85.70%
Staff Training/Technic	3,707	614	1,903	1,804	51.34%	2,283	2,283	455	1,388	895	60.53%	6,000	3,291	2,709	54.85%
Staff Computer Lease	8,841		5,585	3,256	63.17%	5,467	5,467		4,161	1,306	76.11%	14,308	9,746	4,562	68.12%
Software License	13,087		3,517	9,570	26.87%	8,093	8,093		2,580	5,503	32.00%	21,180	6,107	15,073	28.63%
Postage	3,179	91	1,213	1,966	38.16%	1,966	1,966	74	884	1,072	45.47%	5,145	2,107	3,038	40.95%
Subtotal	\$137,352	\$5,171	\$71,641	\$65,711	52.16%	\$84,936	\$84,936	\$3,070	\$51,016	\$33,920	60.06%	\$222,268	\$122,657	\$99,611	55.18%
Training cost															
Participant Supplies	12,358	157	3,019	9,339	24.43%	7,842	7,842	47	1,841	5,801	24.09%	20,000	4,860	15,140	24.30%
Instructional Supply Cost	10,220	1,043	16,201	19	99.88%	10,030	10,030	1600	10,514	(480)	104.83%	26,250	26,715	(465)	101.77%
Credential Exam Fees	14,644	1,884	7,934	6,710	54.18%	9,056	9,056	112	3,290	5,766	35.33%	23,700	11,224	12,476	47.35%
TABE Assessment	7,940	487	7,940	0	100.00%	4,910	4,910	(487)	4,910	0	100.00%	12,850	12,850	0	100.00%
Workkeys	12,358	630	5,424	6,934	43.89%	7,642	7,642	175	1,868	5,774	24.44%	20,000	7,292	12,708	36.46%
Tuition(Adult Ed Skill Upgr	63,895	3918	63,866	0	100.00%	39,494	39,494	-3918	39,494	0	100.00%	103,360	103,360	0	100.00%
Individualized Training															
TQTC Pre Emp Workshops	30,895	1695	30,895	0	100.00%	19,105	19,105	-1895	19,105	0	100.00%	50,000	50,000	0	100.00%
Account/Voucher cost	165,500	13699	142,738	22,762	86.25%	86,200	86,200	5324	51,183	15,017	77.32%	231,700	193,021	37,779	83.69%
On the Job Training	116,640	8124	33,714	82,926	29.90%	20,160	20,160		7,853	12,307	38.95%	136,800	41,557	95,243	30.39%
Awards/Events	1,545		0	1,545	0.00%	955	955		50	905	5.24%	2,500	50	2,450	2.00%
Subtotal	\$441,966	\$32,436	\$311,731	\$130,235	70.53%	\$185,184	\$185,184	\$958	\$140,108	\$45,086	75.65%	\$627,160	\$451,839	\$175,321	72.05%
Supportive Service Cost															
Transportation	30,818	1,810	15,855	14,963	51.45%	19,057	19,057	535	8,510	10,547	44.66%	49,875	24,365	25,510	48.85%
Childcare	8,193	740	6,488	1,705	79.19%	5,067	5,067		0	5,067	0.00%	13,260	5,488	7,772	48.93%
Uniforms Drug Screens etc	6,179	842	6,164	15	99.76%	3,821	3,821	92	1,358	2,463	35.54%	10,000	7,522	2,478	75.22%
Emergency Assistance	3,090			3,090	0.00%	1,910	1,910		0	1,910	0.00%	5,000	0	5,000	0.00%
Subtotal	\$48,280	\$3,392	\$28,507	\$19,773	59.05%	\$29,855	\$29,855	\$627	\$9,868	\$19,887	33.05%	\$78,135	\$39,375	\$38,760	48.11%
Training/Professional Service Fee/Profit															
Training Fee (Profit)	51,156	3,833	\$39,609	\$11,547	77.43%	31,634	31,634	\$1,211	\$23,450	\$8,184	74.13%	\$82,790	\$63,059	19,731	76.17%
Audit	7,866		\$7,866	\$0	100.00%	4,864	4,864		\$4,864	\$0	100.00%	\$12,730	\$0	\$12,730	0.00%
Indirect	100,572	\$7,535	\$77,871	\$22,701	77.43%	\$2,192	\$2,192	\$2,381	\$45,102	\$16,090	74.13%	\$162,764	\$123,973	38,791	76.17%
Subtotal	\$159,594	\$11,368	\$125,346	\$34,248	76.54%	\$98,680	\$98,680	\$3,692	\$74,416	\$24,274	75.40%	\$268,284	\$199,762	\$68,522	77.34%
TOTALS	\$1,237,148	\$88,018	\$917,528	\$319,620	74.16%	\$676,919	\$676,919	\$27,812	\$543,409	\$133,510	80.28%	\$1,460,937	\$1,460,937	\$0	76.33%

SC WORKS WORKLINK

BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER

ANDERSON·OCONEE·PICKENS

Adult / DW - Total

PY12 Budget	PY12 ITA Budgets	PY12 Deobligations	PY12 ITA Budget including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Disbursed that are Paid	PY12 Vouchers Disbursed that haven't cleared	PY12 Obligations (Budget minus all vouchers made)	Remaining to be Obligated	PY13 Obligations
\$374,150.00	\$340,787.13	\$41,010.10	\$299,777.03	\$301,587.38	\$232,702.46	\$68,884.92	\$67,074.57	\$74,372.97	\$96,130.50

Adult

PY12 Budget	PY12 ITA Budgets	PY12 Deobligations	PY12 ITA Budget including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Disbursed that are Paid	PY12 Vouchers Disbursed that haven't cleared	PY12 Obligations (Budget minus all vouchers made)	Remaining to be Obligated	PY13 Obligations
\$253,520.03	\$252,922.74	\$35,366.10	\$217,556.64	\$208,538.12	\$168,228.92	\$40,309.20	\$49,327.72	\$35,963.39	\$55,002.25

DW

PY12 Budget	PY12 ITA Budgets	PY12 Deobligations	PY12 ITA Budget including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Disbursed that are Paid	PY12 Vouchers Disbursed that haven't cleared	PY12 Obligations (Budget minus all vouchers made)	Remaining to be Obligated	PY13 Obligations
\$120,629.97	\$87,864.39	\$5,644.00	\$82,220.39	\$93,049.26	\$64,473.54	\$28,575.72	\$17,746.85	\$38,409.58	\$41,128.25

OJT - Total

PY12 Budget	PY12 Contracts	PY12 Deobligations	PY12 Contracts Including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Paid	PY12 Vouchers that have not cleared	PY12 Obligations (Budget minus all vouchers made)	Budget Remaining
\$136,800.00	\$84,946.84	\$12,259.84	\$72,687.00	\$46,478.37	\$40,415.95	\$6,062.42	\$38,468.47	\$64,113.00

Adult

PY12 Budget	PY12 Contracts	PY12 Deobligations	PY12 Contracts Including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Paid	PY12 Vouchers that have not cleared	PY12 Obligations (Budget minus all vouchers made)	Budget Remaining
\$116,640.00	\$70,962.04	\$12,259.84	\$58,702.20	\$38,625.57	\$32,563.15	\$6,062.42	\$32,336.47	\$57,937.80

DW

PY12 Budget	PY12 Contracts	PY12 Deobligations	PY12 Contracts Including Deobligations	PY12 Vouchers Disbursed	PY12 Vouchers Paid	PY12 Vouchers that have not cleared	PY12 Obligations (Budget minus all vouchers made)	Budget Remaining
\$20,160.00	\$13,984.80		\$13,984.80	\$7,852.80	\$7,852.80	\$0.00	\$6,132.00	\$6,175.20



Worklink Workforce Investment Board Grant #12Y495H4

Budget vs. Actual Expenditures YTD

Job Number 1303

Budgeted Expenses		1303-11010	Total Expenses	Balance	% Spent
codes	Budget	4/29-5/26			
	mod #3 3/1/13				
Salary Total	0.0	332,164	21,723	289,843	42,321 87.26%
Fringe Benefit Total	0.1-0.5	112,257	7,824	102,350	9,907 91.17%
Subtotal		\$444,421	\$29,547	\$392,193	\$52,228 88.25%
Facility TCTC	1.1	12,000		12,000	0 100.00%
Equipment Purchases					
Staff Computer Leases	1.8	7,465		6,492	973 86.97%
Software License	2.11	3,600		3,706	(106) 102.94%
		11,065	0	10,198	867 92.16%
Operating Costs					
Staff Consumable Supplies	1.2	7,200	1,191	3,797	3,403 52.74%
Printing/Copies	1.4	4,800	1,395	3,646	1,154 75.96%
Communications	1.5	12,876	1,008	12,218	658 94.89%
Staff Travel	1.6	24,644	1,474	11,837	12,807 48.03%
Postage	1.9	3,835	296	2,431	1,404 63.39%
Participant Supplies	2.1	4,650	16	820	3,830 17.63%
Subtotal		\$58,005	\$5,380	\$34,749	\$23,256 59.91%
Customer Wage and Fringe Benefits					
Work Experience	2.9	37,120	1573	23,307	13,813 62.79%
Individualized Training Cost					
Participant Books	2.2	5,400	2855	3,925	1,475 72.69%
Assessment/Exam Fees(inc work	2.3	8,650	609	4,609	4,041 53.28%
TABE Testing Materials	2.4	2,050		2,050	0 100.00%
Tuition (Adult Education)	2.5	38,758		38,756	2 99.99%
Tuition (College or Vocational)	2.6	34,650	6138	18,731	15,919 54.06%
Subtotal		\$89,508	\$9,602	\$68,071	\$21,437 76.05%
Customer Supportive Services Cost					
Transportation	3.2	22,500	1,760	16,020	6,480 71.20%
Childcare	3.3	4,800		1,165	3,635 24.27%
Training Support Materials	3.4	3,100	289	1,848	1,252 59.61%
Subtotal		\$30,400	\$2,049	\$19,033	\$11,367 62.61%
Customer Needs Based Related Payment Cost					
Student Incentives (skills&inc con	3.1	37,183	2400	27,665	9,518 74.40%
Emergency Assistance	3.5	3,500	250	500	3,000 14.29%
Subtotal		\$40,683	\$2,650	\$28,165	\$12,518 69.23%
Staff Training/Tech Services					
Staff Training/Conferences	1.7	4,500		1,697	2,803 37.71%
Other					
Advertising	1.3	6,000	2,157	2,377	3,623 39.62%
Audit		5,653		5,653	0 100.00%
Awards/Events	2.10	1,600		1,600	0 100.00%
Subtotal		\$13,253	\$2,157	\$9,630	\$3,623 72.66%
Training Fee (Profit)	4.1	36,765	✓ 2,468	29,491	7,274 80.21%
Indirect	1.11	72,280	5,206	58,330	13,950 80.70%
TOTALS		\$850,000			
Monthly Actual Expenses					
			\$60,632	\$686,864	\$163,136 80.81%

WorkLink Program Year 2012 Financial Status

12RRIWT11 - Rapid Response Grant

	Program Revenue					
	\$ 34,599					
	Program Expenditures	Total Obligated	Total % Obligated	Actual Expended	Actual % Expended	Balance
Bowers EMS/Signature Services	\$ 34,599	34,599	100%	-	0.00%	\$ 34,599
Grant Period: 1/2/13-6/30/13*						
*Extended from 5/31/13 to 6/30/13						

WorkLink Program Year 2012 Financial Status

12RRIWT18 - Rapid Response Grant

	Program Revenue					
	\$ 24,100					
	Program Expenditures	Total Obligated	Total % Obligated	Actual Expended	Actual % Expended	Balance
Pace Labels, Inc Grant	\$ 24,100	24,100	100%	2,581	10.71%	\$ 21,519
Grant Period: 2/25/13-10/31/13						

Palmetto Plating - \$40,400 approved 6/19
 Horizon Machine & Man - sent to SCDEW
 SCMEP - Tech Solotutions & Wilbert Plastics

WorkLink Program Year 2012 Financial Status

11HPW01 - Incentive Grant

Program Revenue

\$ 25,000

Original Budget

Budget Request

Amended Budget

Staff/Board Travel & Training

\$ 6,500

\$ 2,674

\$ 9,174

EMSI

3,375

-

3,375

Youth WorkKeys

11,000

(2,674)

8,326

Printing

4,125

-

4,125

Total In-House

\$ 25,000

\$ -

\$ 25,000

Grant Period: 7/16/12-6/30/13

*Approved by Executive Committee via email vote

WorkLink Program Year 2012 Financial Status							
11INC01 - Incentive Grant							
	Program Revenue						
	\$ 57,999						
	Program Expenditures	Total Obligated	Total % Obligated	Actual Expended	Actual % Expended	Balance	
Supplies - Non-Consumable	\$ 900	900	100%	900	100.00%	\$ -	
CDF Training - Adult/DW	3,846	3,846	100%	3,846	100.00%	-	
WorkKeys Profiles - Employers	13,500	13,500	100%	3,000	22.22%	10,500	
SC Works Orientation Video	1,100	1,100	100%	1,100	100.00%	-	
ADA Computer Equipment	3,802	3,802	100%	3,802	100.00%	-	
AOP Business Showcase	10,000	10,000	100%	10,000	100.00%	-	
Training - WIA Staff	5,151	5,151	100%	5,151	100.00%	-	
Building Renovations	19,700	11,498	58%	-	0.00%	19,700	
Total In-House	\$ 57,999	\$ 49,797	86%	\$ 27,799	47.93%	\$ 30,200	
Grant Period: 4/16/12-6/30/13							
WorkLink Program Year 2012 Financial Status							
11HPW01 - Incentive Grant							
	Program Revenue						
	\$ 25,000						
	Program Expenditures	Total Obligated	Total % Obligated	Actual Expended	Actual % Expended	Balance	
Staff/Board Travel & Training	\$ 9,174	9,174	100%	6,169	67.24%	\$ 3,005	
Printing	4,125	4,125	100%	3,452	83.70%	673	
Youth WorkKeys	8,326	8,326	100%	8,326	100.00%	-	
EMSI	3,375	3,375	100%	2,813	83.33%	563	
Total In-House	\$ 25,000	\$ 25,000	100%	\$ 20,760	83.04%	\$ 4,240	
Grant Period: 7/16/12-6/30/13							
WorkLink Program Year 2012 Financial Status							
12INC01 - Incentive Grant							
	Program Revenue						
	\$ 5,417						
	Program Expenditures	Total Obligated	Total % Obligated	Actual Expended	Actual % Expended	Balance	
2013 AOP BIS Transportation	\$ 5,417	-	0%	-	0.00%	\$ 5,417	
Grant Period: 4/1/13-6/30/14							

	Program Adult	Admin Adult	Program DW	Admin DW	Program Youth	Admin Youth	Total	YTD May	Actual % Expended	Goal Expended	Goal % Expended	Balance
PY'12 Allocations (NFA-12-01)	\$ 763,248	\$ 84,805	\$ 850,452	\$ 94,495	\$ 851,486	\$ 94,610	\$ 2,739,096					
Transfer of funds	212,613		(212,613)									
Carryover from PY'11	903,990	87,296	190,614	102,223	435,079	80,909	1,800,111					
	\$ 1,879,851	\$ 172,101	\$ 828,453	\$ 196,718	\$ 1,286,565	\$ 175,519	\$ 4,539,207					
Obligations												
Henkels & McCoy - Adult	\$ 1,237,148	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,237,148	\$ 917,528	74.16%	\$ 1,134,052	91.67%	\$ 319,620
Henkels & McCoy - DW	-	-	676,919	-	-	-	676,919	543,409	80.28%	620,509	91.67%	133,510
Undesignated Funds	359,593	88,616	66,659	104,996	366,555	58,186	1,044,605		0.00%	-	0.00%	1,044,605
Henkels & McCoy - Youth	-	-	-	-	850,000	-	850,000	686,864	80.81%	779,167	91.67%	163,136
Total Pass-Through Contracts	\$ 1,596,741	\$ 88,616	\$ 743,578	\$ 104,996	\$ 1,216,555	\$ 58,186	\$ 3,808,672	\$ 2,147,801	56.39%	\$ 2,533,728	66.53%	1,660,871
Total Revenue after Obligations	\$ 283,110	\$ 83,485	\$ 84,875	\$ 91,722	\$ 70,010	\$ 117,333	\$ 730,535					
In-House Expenses												
Salaries	142,000	27,000	41,500	35,000	32,500	52,000	330,000	254,191	77.03%	302,500	91.67%	75,809
Fringe	45,000	8,775	13,250	11,175	10,300	16,500	105,000	79,786	75.99%	96,250	91.67%	25,214
Travel - Training/Conferences/Meetings	6,500	1,200	2,500	1,800	3,500	500	16,000	436	2.73%	14,667	91.67%	15,564
Travel - Committee/Board	1,980	-	660	-	3,360	-	6,000	1,308	21.80%	5,500	91.67%	4,692
Supplies - Consumable	-	800	-	900	-	800	2,500	1,781	71.24%	2,292	91.67%	719
Supplies - Non-Consumable	-	1,000	-	1,000	-	500	2,500	1,054	42.15%	2,292	91.67%	1,446
WorkKeys	190	-	-	-	-	-	225	224	99.33%	225	100.00%	2
Consulting	-	150	-	100	-	100	350	204	58.29%	321	91.67%	146
Insurance - Tort	-	2,500	-	2,500	-	2,000	7,000	6,434	91.91%	6,417	91.67%	566
Insurance - Auto C&C	-	75	-	75	-	75	225	168	74.85%	206	91.67%	57
Insurance - Auto Liab	-	350	-	250	-	200	800	697	87.08%	733	91.67%	103
Postage	-	850	-	800	-	850	2,500	1,189	47.56%	2,292	91.67%	1,311
Printing	-	1,400	-	1,300	-	1,300	4,000	3,680	92.01%	3,667	91.67%	320
Telephone Voice & LD & Cellphones	-	3,500	-	3,500	-	3,500	10,500	9,846	93.77%	9,625	91.67%	654
Web Site Hosting & Renewal Fees	-	5,040	-	2,520	-	2,520	10,080	5,997	59.49%	9,240	91.67%	4,083
Newspapers, Magazines, & Books	-	700	-	650	-	350	1,700	-	0.00%	1,558	91.67%	1,700
Memberships, Dues, & Prof Fees	-	2,000	-	1,300	-	1,000	4,300	2,867	66.67%	3,942	91.67%	1,433
Training	9,800	-	3,500	-	6,700	-	20,000	1,224	6.12%	18,333	91.67%	18,776
Conf & Mig Fees	-	700	-	300	-	-	1,000	-	0.00%	917	91.67%	1,000
Job Fair Expenses	18,000	-	6,000	-	-	-	24,000	21,274	88.64%	24,000	100.00%	2,726
Rent - WorkLink Storage	-	480	-	380	-	340	1,200	890	74.17%	1,100	91.67%	310
Rent - WorkLink Office	-	7,000	-	6,000	-	6,000	19,000	17,362	91.38%	17,417	91.67%	1,638
R&M - Equipment	-	500	-	250	-	250	1,000	290	29.00%	917	91.67%	710
R&M & Gas - W/A Car	-	1,000	-	1,000	-	1,000	3,000	1,705	56.82%	2,750	91.67%	1,295
IT Main/Support	-	1,500	-	1,500	-	1,000	4,000	3,282	82.04%	3,667	91.67%	718
Outreach	-	1,000	-	500	-	500	2,000	1,697	84.87%	1,833	91.67%	303
COG Meeting Expense	-	1,000	-	1,000	-	3,000	5,000	2,837	56.75%	4,583	91.67%	2,163
Equipment	-	3,625	-	3,222	-	1,208	8,055	8,055	100.00%	8,055	100.00%	0
Indirect Cost Pool	59,640	11,340	17,430	14,700	13,650	21,840	138,600	115,055	83.01%	127,050	91.67%	23,545
Total In-House	\$ 283,110	\$ 83,485	\$ 84,875	\$ 91,722	\$ 70,010	\$ 117,333	\$ 730,535	\$ 543,531	74.40%	672,347	92.03%	187,004

*Move \$750 from Job Fair to Outreach

WorkLink Program Year 2012 Financial Status

Indirect Rate Analysis

	Indirect	Salaries	% Rate
July	7,041.90	10,604.26	66.41%
August	14,351.29	37,888.23	37.88% 3 Pay Periods
September	12,274.59	25,507.71	48.12%
October	13,771.72	26,656.41	51.66%
November	11,814.69	23,212.50	50.90%
December	7,939.32	23,371.28	33.97%
January	13,260.56	23,766.75	55.79%
February	8,433.31	18,582.17	45.38%
March	9,525.83	27,686.25	34.41% 3 Pay Periods
April	8,729.24	18,457.50	47.29%
May	7,912.32	18,457.50	42.87%
June	115,054.77	254,190.56	45.26%
Budget	138,600.00	330,000.00	
% Spent	83.01%	77.03%	

WIA Program Allotments for Program Year 2013

Summary of the WIA Adult, Youth, and Dislocated Worker Allocations by Local Area

May 9, 2013

PY 2013	Adult \$11,746,745 95% \$11,159,408	Youth \$12,151,961 95% \$11,544,363	Dislocated Worker \$15,453,121 80% \$12,362,497	Total \$39,351,827 Local Distribution \$35,066,268
Trident	\$1,294,772	\$1,390,952	\$1,440,251	\$4,125,975
Greenville	\$867,081	\$883,928	\$929,088	\$2,680,097
Upper Savannah	\$656,918	\$663,777	\$815,334	\$2,136,029
Upstate	\$953,189	\$976,959	\$937,534	\$2,867,682
Midlands	\$1,349,425	\$1,473,962	\$1,945,538	\$4,768,925
Worklink	\$832,761	\$891,462	\$823,748	\$2,547,971
Lower Savannah	\$938,680	\$907,896	\$1,168,073	\$3,014,649
Pee Dee	\$1,102,617	\$1,151,630	\$1,100,676	\$3,354,923
Catawba	\$1,003,889	\$1,028,705	\$785,068	\$2,817,662
Santee Lynches	\$612,887	\$612,960	\$600,650	\$1,826,497
Lowcountry	\$502,911	\$544,676	\$496,853	\$1,544,440
Waccamaw	\$1,044,278	\$1,017,456	\$1,319,684	\$3,381,418
Local Area Totals	\$11,159,408	\$11,544,363	\$12,362,497	\$35,066,268
Statewide Reserve	\$587,337	\$607,598	\$772,656	\$1,967,591
State Rapid Response			\$2,317,968	\$2,317,968
State Totals	\$587,337	\$607,598	\$3,090,624	\$4,285,560
Total Allotment	\$11,746,745	\$12,151,961	\$15,453,121	\$39,351,827

	Program			Admin			Total
	Program Adult	Admin Adult	Program DW	Admin DW	Youth	Youth	Total
PY'13 Allocations (NFA-13-01)	749,485.00	83,276.00	741,373.00	82,375.00	802,316.00	89,146.00	2,547,971.00
Transfer of funds (35%)	259,480.00		(259,480.00)				-
PY'12 Henkels & McCoy Carryover	465,000.00	84,000.00	93,000.00	94,000.00	380,000.00	68,000.00	1,184,000.00
PY'12 Undesignated Funds Carryover	1,473,965.00	167,276.00	574,893.00	176,375.00	1,182,316.00	157,146.00	3,731,971.00
Obligations							
Henkels & McCoy - Adult	1,060,778.00	-	-	-	-	-	1,060,778.00
Henkels & McCoy - DW	-	-	469,223.00	-	-	-	469,223.00
Henkels & McCoy - Youth	-	-	-	-	839,929.00	-	839,929.00
Undesignated Funds	164,134.00	59,986.00	18,025.00	79,310.00	232,061.00	33,315.00	586,831.00
Total Pass-Through Contracts	1,224,912.00	59,986.00	487,248.00	79,310.00	1,071,990.00	33,315.00	2,956,761.00
Total Revenue after Obligations	249,053.00	107,290.00	87,645.00	97,065.00	110,326.00	123,831.00	775,210.00
	Program			Admin			Total
	Program Adult	Admin Adult	Program DW	Admin DW	Youth	Youth	Total
In-House Expenses							
Salaries	122,160.00	37,806.00	41,383.00	37,797.00	62,026.00	48,644.00	349,816.00
Fringe	37,201.00	11,954.00	12,650.00	11,951.00	19,396.00	15,480.00	108,632.00
SC Works Centers & Satellites Facility Costs	92,582.00	15,960.00	39,316.00	10,251.00	2,853.00	10,251.00	171,213.00
Payment from SCDEW for Facilities	(56,197.00)	(1,320.00)	(24,085.00)	(1,320.00)	-	(1,320.00)	(84,242.00)
Travel - Training/Conferences/Meetings	3,000.00	3,000.00	2,500.00	2,500.00	2,000.00	3,000.00	8,500.00
Travel - Committee/Board	250.00	250.00	250.00	250.00	750.00	2,000.00	2,500.00
Supplies - Consumable	750.00	750.00	750.00	750.00	330.00	330.00	1,000.00
Supplies - Non-Consumable	335.00	335.00	335.00	335.00	1,125.00	1,125.00	3,375.00
EMSI Data Charges	1,125.00	1,125.00	1,125.00	1,125.00	70.00	70.00	210.00
Consulting	70.00	70.00	70.00	70.00	2,520.00	2,520.00	7,560.00
Insurance - Tort	2,520.00	2,520.00	2,520.00	2,520.00	60.00	60.00	190.00
Insurance - Auto C&C	65.00	65.00	65.00	65.00	250.00	250.00	770.00
Insurance - Auto Liab	260.00	260.00	260.00	260.00	160.00	160.00	500.00
Postage	170.00	170.00	170.00	170.00	1,332.00	1,332.00	4,000.00
Printing	1,334.00	1,334.00	1,334.00	1,334.00	358.00	358.00	1,074.00
Telephone Voice	358.00	358.00	358.00	358.00	108.00	108.00	324.00
Telephone LD	108.00	108.00	108.00	108.00	483.00	483.00	1,450.00
Cellphone (Executive Director)	484.00	484.00	484.00	483.00	2,360.00	2,360.00	7,080.00
Web Site Hosting & Renewal Fees	2,360.00	2,360.00	2,360.00	2,360.00	55.00	55.00	165.00
Newspapers, Magazines, & Books	55.00	55.00	55.00	55.00	930.00	930.00	2,800.00
Memberships, Dues, & Prof Fees	935.00	935.00	935.00	935.00	6,250.00	6,250.00	16,250.00
Training	7,000.00	7,000.00	7,000.00	3,000.00			
Job Fair Expenses							
Rent - WorkLink Storage		55.00		55.00		55.00	165.00
Rent - WorkLink Office (\$1635/mo)		1,635.00		1,635.00		1,635.00	4,905.00
R&M & Gas - WIA Car		835.00		835.00		830.00	2,500.00

	Program Adult			Program DW			Admin DW			Program Youth		Admin Youth		Total
	Program Adult	Admin Adult	Program DW	Admin DW	Program DW	Admin DW	Program DW	Admin DW	Program DW	Admin DW	Program Youth	Admin Youth	Program Youth	
<u>In-House Expenses</u>														
IT Maint/Support														5,300.00
Outreach	(7)	2,000.00			1,000.00		670.00					660.00		5,000.00
COG Meeting Expense							867.00					3,265.00		5,000.00
Indirect Cost Pool (42%)		51,307.00			17,381.00		15,879.00				26,051.00	20,430.00		146,923.00
Total In-House		249,053.00			87,645.00		97,065.00				110,326.00	123,831.00		775,210.00
Balance														
(1) July-August only														
(2) Will add with Henkels & McCoy Carryover														
(3) July-September only														
(4) We paid for this in January for 1 year. When we move, we should receive a refund of approximately \$200.														
(5) Includes 7 staff members														
(6) Reimbursement from SCDEW for cost sharing comprehensive center, satellite centers, & Finance Director time.														
(7) More outreach with moving of centers as well as decreased UI traffic.														

Grant Opportunities

1. **Dislocated Worker National Emergency Grant with SCDEW - (DW-NEG)**
 - Total grant applied for of \$55,357.
 - Of the total amount, \$2,624 will stay in-house with WorkLink to offset the Finance Director's time spent on this grant.
 - The remaining \$52,733 will flow through to Henkels & McCoy to serve 15 participants for Instructional Training by partnering with Tri-County Technical College to provide MSSC Certified Production Technician (CPT) certifications.
 - This also allows 10 of the 15 participants to be enrolled in On-the-Job Training.
2. **Trade Adjustment Assistance Community College and Career Training Grant with Tri-County Technical College – (TAACCCT)**
 - Will reimburse us up to 5% of a career coach for co-enrolling TAACCCT eligible participants in WIA, and providing job placement assistance and follow-up services ~ \$2,656 to supplement Henkels & McCoy PY'13 Grant
3. **Make it in America Grant**
 - SCACOG/WorkLink will be the direct recipient of the funds (\$1,299,610) of which \$1,213,454 will flow through to 3 technical colleges.
 - WorkLink will receive ~ \$86,156 of the grant to pay for a portion of staff time dedicated to the grant for monitoring, reporting, and invoices.

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
GRANT BUDGET SUMMARY

Service Provider Henkels & McCoy, Inc. Contract # 13A995H1 & 13D995H1
 Project/Activity SC Works Operator Funding Source WIA Adult & DLW Formula Funds Modification #

CATEGORIES	ADULT	DLW	Administration	Non-Administration	Total Budget Amount
STAFF COSTS (Salaries & Fringe Benefits)	\$ 449,736.80	\$ 192,744.34		\$ 642,481.14	\$ 642,481.14
OPERATING COSTS	\$ 68,183.59	\$ 29,221.54		\$ 97,405.12	\$ 97,405.12
TRAINING COSTS	\$ 366,943.40	\$ 168,333.60		\$ 535,277.00	\$ 535,277.00
SUPPORTIVE SERVICE COSTS	\$ 42,665.00	\$ 18,285.00		\$ 60,950.00	\$ 60,950.00
Training Fees/Professional Fees/ Profit	\$ 53,883.78	\$ 23,093.05		\$ 76,976.83	\$ 76,976.83
Indirect Costs	\$ 81,836.94	\$ 35,072.97		\$ 116,909.91	\$ 116,909.91
Total Budget Costs	\$ 1,063,249.50	\$ 466,750.50	\$ -	\$ 1,530,000.00	\$ 1,530,000.00
Percentage of Budget	69.49%	30.51%		100.00%	
Cost Limitations			2% Maximum	At least 98%	100%

**Approved by Executive
 Committee 6/17/13
 via Email Vote*

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
COST AND PRICE ANALYSIS WORKSHEET

Service Provider Henkels & McCoy, Inc.

Contract # 13A995H1 & 13D995H1

Project/ Activity SC Works Operator

Funding Source WIA Adult & DLW Formula Funds

Mod # _____

STAFF & INDIRECT COST - BUDGET SUMMARY

SALARIES, FRINGE BENEFITS, & INDIRECT COST				ADULT		DLW		ADMINISTRATION		NON-ADMINISTRATION	
Staff Salaries:	Salary	No. of	% of	TOTAL	%	Amount	%	Amount	%	Amount	%
Position Title	Per Month	Months	Time	AMOUNT							
TOTAL SALARIES				\$ 430,557		\$ 301,390		\$ 129,167			\$ 430,557
FRINGE BENEFITS:											
Health Insurance		X	34.99%	\$ 150,656	70.00%	\$ 105,459	30.00%	\$ 45,197		100%	\$ 150,656
FICA		X	7.65%	\$ 32,938	70.00%	\$ 23,056	30.00%	\$ 9,881		100%	\$ 32,938
State UEC-SUI		X	3.05%	\$ 13,132	70.00%	\$ 9,192	30.00%	\$ 3,940		100%	\$ 13,132
FUT		X	0.14%	\$ 603	70.00%	\$ 422	30.00%	\$ 181		100%	\$ 603
SC WC		X	0.34%	\$ 1,464	70.00%	\$ 1,025	30.00%	\$ 439		100%	\$ 1,464
Public-General Liability		X	3.05%	\$ 13,132	70.00%	\$ 9,192	30.00%	\$ 3,940		100%	\$ 13,132
		X	0.00%	\$ -	70.00%	\$ -	30.00%	\$ -		100%	\$ -
TOTAL FRINGE BENEFITS				\$ 211,924		\$ 148,347		\$ 63,577			\$ 211,924
INDIRECT COST: RATE	\$ 1,336,113.26	X	8.75%	\$ 116,910	70.00%	\$ 81,837	30.00%	\$ 35,073		100%	\$ 116,910
TOTAL COST				\$ 759,391	70.00%	\$ 531,574	30.00%	\$ 227,817		100%	\$ 759,391

Each position must be supported by a job description.

A complete "Per Person" cost analysis must be completed and attached as an Exhibit.

A current copy of your "Indirect Cost Rate" as approved by your Cognizant Agency and description of the costs covered must be attached to the budget as an Exhibit

WORKFORCE INVESTMENT BOARD
WorkLink Workforce Investment Area
COST AND PRICE ANALYSIS WORKSHEET

Service Provider Henkels & McCoy, Inc. Contract # 13A995H1 & 13D995H1 Mod # _____
Project/Activity SC Works Operator Fund Source WIA Adult & DLW Formula Funds

Categories & Line Items	Total Cost	ADULT	DLW	Non-Administration
OPERATING COSTS				
1.2 Staff Expendable Supplies & Materials	\$ 12,000	\$ 8,400	\$ 3,600	\$ 12,000
1.3 Program Outreach Expenses (Brochures, Flyers, etc.)	\$ 2,760	\$ 1,932	\$ 828	\$ 2,760
1.4 Copy & Print Expenses	\$ 12,000	\$ 8,400	\$ 3,600	\$ 12,000
1.5 Communications (Phone, Fax, Internet, etc.)	\$ 10,685	\$ 7,479	\$ 3,205	\$ 10,685
1.6 Staff Travel				
Local Mileage cost	\$ 17,494	\$ 12,246	\$ 5,248	\$ 17,494
Non-Local Mileage cost	\$ 4,800	\$ 3,360	\$ 1,440	\$ 4,800
Non-Local Per Diem/Lodging Cost	\$ 9,600	\$ 6,720	\$ 2,880	\$ 9,600
1.7 Staff Training / Technical Services Costs (Conf, Training, etc.)	\$ 4,800	\$ 3,360	\$ 1,440	\$ 4,800
1.8 Non-Expendable Equipment Purchases (Computers, software, e				
Non-Expendable Equipment Purchases (Computer Leases)	\$ 11,836	\$ 8,285	\$ 3,551	\$ 11,836
Wide Area Network (WAN) Equipment and Computer Software	\$ 6,300	\$ 4,410	\$ 1,890	\$ 6,300
1.9 Postage (Stamps, FedEx, etc.)	\$ 5,130	\$ 3,591	\$ 1,539	\$ 5,130
TOTAL OPERATING COSTS	\$ 97,405	\$ 68,184	\$ 29,222	\$ 97,405
TRAINING COSTS				
2.1 WI Customer Supplies & Materials Costs	\$ 18,000	\$ 12,600	\$ 5,400	\$ 18,000
2.2 WI Customer Book Costs	\$ 28,500	\$ 19,950	\$ 8,550	\$ 28,500
2.3 WI Customer Credential Exam Fees (C.N.A., GED, TABE, WorkKeys,	\$ 21,500	\$ 15,050	\$ 6,450	\$ 21,500
2.4 Other: TABE Assessment Costs	\$ -	\$ -	\$ -	\$ -
2.12 Other: WorkKeys Assessment Costs	\$ 10,500	\$ 7,350	\$ 3,150	\$ 10,500
WI Customer Individualized Training Costs				
2.5 Tuition Cost (Adult Education Skill Upgrade & GED)	\$ 103,362	\$ 72,353	\$ 31,009	\$ 103,362
2.6 Other Individualized Training Cost (TCTC Pre-Employment Wor	\$ 35,000	\$ 24,500	\$ 10,500	\$ 35,000
2.6 Individual Training Account/Voucher Cost	\$ 217,615	\$ 143,140	\$ 74,475	\$ 217,615
2.8 WI Customer On-the-Job Training Costs				
Reimbursable Wages	\$ 100,800	\$ 72,000	\$ 28,800	\$ 100,800
TOTAL TRAINING COSTS	\$ 535,277	\$ 366,943	\$ 168,334	\$ 535,277
SUPPORTIVE SERVICES COSTS				
3.1 WI Customer Incentives (Youth Only)	\$ -			\$ -
3.2 WI Customer Transportation Costs	\$ 36,750	\$ 25,725	\$ 11,025	\$ 36,750
3.3 WI Customer Childcare Costs	\$ 11,700	\$ 8,190	\$ 3,510	\$ 11,700
3.4 Training Support Materials (Uniforms, Drug Screens, Background Checks, et	\$ 10,000	\$ 7,000	\$ 3,000	\$ 10,000
3.5 WI Customer Emergency Assistance (Rent, Car Repair, etc.)	\$ 2,500	\$ 1,750	\$ 750	\$ 2,500
3.6 Laptop Incentive (Youth Only)	\$ -			\$ -
TOTAL SUPPORTIVE SERVICES COSTS	\$ 60,950	\$ 42,665	\$ 18,285	\$ 60,950
TRAINING/PROFESSIONAL FEES/PROFIT				
4.1 Profit (Professional Fee - 5%) Can be tied to Performance	\$ 66,806	\$ 46,764	\$ 20,042	\$ 66,806
4.2 Audit Fee	\$ 10,171	\$ 7,120	\$ 3,051	\$ 10,171
TOTAL FEES / PROFIT COSTS	\$ 76,977	\$ 53,884	\$ 23,093	\$ 76,977

* A Complete cost and price analysis of Actual/Projected cost must be attached to the budget as an Exhibit

WORKFORCE INVESTMENT BOARD
WorkLink Workforce Investment Area
CLIENT FLOW PROJECTIONS

Service Provider Henkels & McCoy, Inc. Contract # 13A995H1 & 13D995H1

Project Activity SC Works Operator Fund Source WIA Adult & DLW Formula Funds

Mod#

Period	Clients Served			Clients Exited			Active Clients
	Carryover	New	Cumulative	Positive	Negative	Cumulative	
July-13	400	20	420	15	10	25	395
August-13	395	30	425	30	10	40	385
September-13	385	30	415	30	10	40	375
October-13	375	20	395	15	5	20	375
November-13	375	20	395	15	5	20	375
December-13	375	10	385	20	5	25	360
January-14	360	30	390	20	5	25	365
February-14	365	30	395	20	5	25	370
March-14	370	30	400	30	10	40	360
April-14	360	30	390	20	5	25	365
May-14	365	30	395	30	10	40	355
June-14	355	30	385	30	10	40	345
PY12 Carryovers	400	310					
New PY13 WIA Enrollments	310						
Active Follow-up	359						
Total Served	1069						
Estimated PY13 Carryovers	345						

Active Clients equal Cumulative Clients Served minus Cumulative Clients Exited

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
GRANT BUDGET SUMMARY

Service Provider Henkels & McCoy, Inc. Contract # 13Y495H5

Project/Activity Palmetto Youth Connections Funding Source WIA Youth Modification # _____

CATEGORIES	Administration	Non-Administration	Total Budget Amount
STAFF COSTS (Salaries & Fringe Benefits)		\$ 448,710	\$ 448,710
OPERATING COSTS		\$ 78,081	\$ 78,081
TRAINING COSTS		\$ 132,208	\$ 132,208
SUPPORTIVE SERVICE COSTS		\$ 74,491	\$ 74,491
Training Fees/Professional Fees/ Profit		\$ 42,258	\$ 42,258
Indirect Costs		\$ 64,180	\$ 64,180
Total Budget Costs	\$ -	\$ 839,929	\$ 839,929
Percentage of Budget		100.00%	
Cost Limitations	2% Maximum	At least 98%	100%

* Sent to Executive
 Committee for vote
 6/24 meeting scheduled
 (approved @ 6/24 Exec.)
 Comm. mtg

WORKFORCE INVESTMENT BOARD
WorkLink Workforce Investment Area
COST AND PRICE ANALYSIS WORKSHEET

Service Provider Henkels & McCoy, Inc.

Contract # 13Y495H5

Project/ Activity Palmetto Youth Connections

Funding Source WIA Youth Mod # _____

STAFF & INDIRECT COST - BUDGET SUMMARY

SALARIES, FRINGE BENEFITS, & INDIRECT COST					ADMINISTRATION		NON-ADMINISTRATIVE	
Staff Salaries: Position Title	Salary Per Month	No. of Months	% of Time	TOTAL AMOUNT	%	Amount	%	Amount
TOTAL SALARIES				\$325,644		\$0		\$325,644
FRINGE BENEFITS:								
FICA		X	7.65%	\$24,912		\$0		\$24,912
Workers Comp.		X	0.34%	\$1,107		\$0		\$1,107
Health & Wealth (Pos. Level)		X	23.56%	\$76,727		\$0		\$76,727
Ret. / Pension		X	0.00%	\$0		\$0		\$0
Unemployment Insurance (State & Federal)		X	3.19%	\$10,388		\$0		\$10,388
Other (Specify): General Liability Insurance		X	3.05%	\$9,932		\$0		\$9,932
TOTAL FRINGE BENEFITS				\$123,066		\$0		\$123,066
INDIRECT COST: % RATE				\$ 64,180.39		\$0		\$ 64,180.39
TOTAL COST				\$512,890		\$0		\$512,890

Each position must be supported by a job description. A complete "Per Person" cost analysis must be completed and attached as an Exhibit. A current copy of your "Indirect Cost Rate" as approved by your Cognizant Agency and description of the costs covered must be attached to the budget as an Exhibit

WORKFORCE INVESTMENT BOARD

WorkLink Workforce Investment Area

COST AND PRICE ANALYSIS WORKSHEET

Service Provider Henkels & McCoy, Inc.

Contract # 13Y495H5

Mod # _____

Project/Activity Palmetto Youth Connections

Fund Source WIA Youth

Categories & Line Items	Total Cost	Administration	Non-Administration
OPERATING COSTS			
1.2 Staff Expendable Supplies & Materials	\$ 6,000		\$ 6,000
1.3 Program Outreach Expenses (Brochures, Flyers, etc.)	\$ 9,000		\$ 9,000
1.4 Copy & Print Expenses	\$ 4,800		\$ 4,800
1.5 Communications (Phone, Fax, Internet, etc.)	\$ 10,746		\$ 10,746
1.6 Staff Travel			
Local Mileage cost	\$ 20,840		\$ 20,840
Non-Local Mileage cost	\$ 2,000		\$ 2,000
Non-Local Per Diem/Lodging Cost	\$ 3,750		\$ 3,750
1.7 Staff Training / Technical Services Costs (Conf, Training, etc.)	\$ 6,000		\$ 6,000
1.8 Non-Expendable Equipment Purchases (Computers, software, etc.)			
Non-Expendable Equipment Purchases (Computer Leases)	\$ 7,520		\$ 7,520
Wide Area Network (WAN) Equipment and Computer Software	\$ 3,840		\$ 3,840
1.9 Postage (Stamps, FedEx, etc.)	\$ 3,585		\$ 3,585
TOTAL OPERATING COSTS	\$ 78,081	\$ -	\$ 78,081
TRAINING COSTS			
2.1 WI Customer Supplies & Materials Costs	\$ 6,400		\$ 6,400
2.2 WI Customer Book Costs	\$ 8,000		\$ 8,000
2.3 WI Customer Credential Exam Fees (C.N.A., GED, TABE, WorkKeys, etc.)	\$ 8,650		\$ 8,650
2.4 Other: TABE Assessment Costs	\$ 2,050		\$ 2,050
WI Customer Individualized Training Costs			
2.5 Tuition Cost (Adult Education Skill Upgrade & GED)	\$ 38,758		\$ 38,758
2.6 Individual Training Account/Voucher Cost	\$ 24,990		\$ 24,990
2.9 WI Customer Work Experience Costs			
Reimbursable Wages	\$ 41,760		\$ 41,760
2.10 WI Customer Awards & Recognition Costs	\$ 1,600		\$ 1,600
TOTAL TRAINING COSTS	\$ 132,208	\$ -	\$ 132,208
SUPPORTIVE SERVICES COSTS			
3.1 WI Customer Incentives (Youth Only)	\$ 40,491		\$ 40,491
3.2 WI Customer Transportation Costs	\$ 22,500		\$ 22,500
3.3 WI Customer Childcare Costs	\$ 4,800		\$ 4,800
3.4 Training Support Materials (Uniforms, Drug Screens, Background Checks, etc.)	\$ 3,200		\$ 3,200
3.5 WI Customer Emergency Assistance (Rent, Car Repair, etc.)	\$ 3,500		\$ 3,500
TOTAL SUPPORTIVE SERVICES COSTS	\$ 74,491	\$ -	\$ 74,491
TRAINING/PROFESSIONAL FEES/PROFIT			
4.1 Profit (Professional Fee - 5%) Can be tied to Performance	\$ 36,675		\$ 36,675
4.2 Audit Fee	\$ 5,584		\$ 5,584
TOTAL FEES / PROFIT COSTS	\$ 42,258	\$ -	\$ 42,258

* A Complete cost and price analysis of Actual/Projected cost must be attached to the budget as an Exhibit

WORKFORCE INVESTMENT BOARD
WorkLink Workforce Investment Area
CLIENT FLOW PROJECTIONS

Service Provider Henkels & McCoy, Inc.

Contract # 13Y495H4

Project/Activity Palmetto Youth Connections

Fund Source WIA

Mod # _____

Period	Clients Served			Clients Exited Cumulative	Active Clients
	Carryover	New	Cumulative		
July-13	70	5	75	10	65
August-13	65	5	70	10	60
September-13	60	15	75	20	55
October-13	55	5	60	10	50
November-13	50	5	55	10	45
December-13	45	5	50	10	40
January-14	40	10	50	10	40
February-14	40	10	50	10	40
March-14	40	10	50	10	40
April-14	40	10	50	5	45
May-14	45	10	55	10	45
June-14	45	0	45	10	35
Carryovers	70	90			
New Enrollments		90			
Follow-up Cases		61			
Total Served		221			
Planned Carryovers		35			

Active Clients equal Cumulative Clients Served minus Cumulative Clients Exited

Service Provider
Status Update
July 2011 - June 2012

ENROLLMENT REPORT	PYC					
*Special notes:						
Board Goal	155					
PY'12 Month	NEW WIA Enrollments	Total Enrollments	Monthly Planned Enrollment	YTD % of Monthly Plan	YTD % of Total Planned	YTD % of Board Goal
<i>Active Carryover</i>		72				
July	7	79	5	140%	8%	51%
August	7	86	5	140%	17%	55%
September	12	98	10	120%	31%	63%
October	10	108	5	200%	43%	70%
November	4	112	5	80%	48%	72%
December	4	116	5	80%	53%	75%
January	6	122	10	60%	60%	79%
February	6	128	10	60%	67%	83%
March	12	140	10	120%	82%	90%
April	10	150	10	100%	94%	97%
May	10	160	8	125%	106%	103%
June	0	160	0	#DIV/0!	106%	103%
Totals	88	160	83			

PY 2012 WIA Quarterly Report Summary - 3rd Quarter (rolling 4 quarters)

		State			Worklink			Upper Savannah			Upstate			Greenville			Midlands			Trident		
Performance Measure	Group	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	80% of Goal		
*Placement in Employment or Education	Youth (14-21)	66.0	52.8	67.4	73.8	59.1	79.1	75.3	60.1	67.7	79.3	63.5	80.3	67.2	53.8	53.8	71.8	57.5	62.7	50.2		
*Attainment of Degree or Certificate	Youth (14-21)	67.0	53.6	71.2	77.7	62.2	81.5	72.9	58.4	77.5	86.0	68.8	82.3	66.5	53.2	52.4	65.0	52.0	63.7	61.3		
***Literacy or Numeracy	Youth (14-21)	52.0	41.6	55.8	67.3	53.9	59.1	53.3	42.7	56.6	85.0	68.0	83.3	52.0	41.6	61.7	49.4	39.6	60.4	48.4		
Gains Entered	Adults	66.4	53.2	69.4	69.1	55.3	64.5	72.1	57.7	67.1	71.7	57.4	70.3	67.2	53.8	67.6	74.5	59.6	65.4	52.4		
Employment Data	DW	73.5	58.8	73.6	69.8	55.9	65.4	81.2	65.0	73.1	75.0	60.0	73.0	75.6	60.5	76.5	85.2	68.2	74.8	59.9		
**Retention	Adults	86.4	69.2	84.9	88.8	71.1	87.5	82.2	65.8	83.7	91.0	72.8	86.0	87.1	69.7	84.5	89.5	71.6	86.0	68.8		
Rate	DW	91.5	73.2	91.3	95.2	76.2	90.8	92.5	74.0	92.2	96.3	77.1	91.8	94.4	75.6	93.6	90.7	72.6	90.1	72.1		
**Average Earnings	Adults	10,700	8,560	10,381	11,538	9,230	10,857	10,165	8,132	9,932	12,834	10,267	11,624	11,889	9,511	10,817	10,769	8,615	11,054	8,843		
Earnings	DW	15,100	12,080	15,033	14,760	11,808	14,571	14,043	11,234	13,270	15,643	12,514	15,266	17,319	13,855	16,090	14,555	11,644	17,720	14,176		

		Pee Dee			Lower Savannah			Catawba			Santee Lynches			Waccamaw			Lowcountry		
Performance Measure	Group	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual	Goal	80% of Goal	Actual
*Placement in Employment or Education	Youth (14-21)	64.7	51.8	69.0	62.7	50.2	59.4	62.7	50.2	58.7	62.7	50.2	58.6	74.1	59.3	73.3	64.9	52.0	65.0
*Attainment of Degree or Certificate	Youth (14-21)	78.8	63.1	86.5	63.7	51.0	44.3	63.7	51.0	66.5	63.6	50.9	65.0	75.2	60.2	69.4	68.6	54.9	71.0
***Literacy or Numeracy Gains	Youth (14-21)	63.0	50.4	65.6	49.4	39.6	32.1	55.8	44.7	64.4	49.4	39.6	52.0	49.4	39.6	40.0	52.0	41.6	42.6
Entered Employment Data	Adults DW	63.1	50.5	70.5	63.1	50.5	66.7	63.1	50.5	66.1	66.4	53.2	71.6	70.8	56.7	71.3	64.3	51.5	65.9
**Retention	Adults DW	72.6	58.1	71.2	76.0	60.8	74.2	71.8	57.5	74.0	69.8	55.9	58.9	82.2	65.8	77.0	71.6	57.3	72.0
Rate	Adults DW	85.6	68.5	84.9	87.5	70.0	87.1	83.9	67.2	85.8	90.9	72.8	88.8	85.4	68.4	86.3	85.9	68.8	82.7
		92.0	73.6	92.6	91.4	73.2	89.8	90.7	72.6	94.2	91.5	73.2	91.4	92.7	74.2	92.2	86.9	69.6	85.3
**Average Earnings	Adults	10,340	8,272	10,427	10,165	8,132	9,248	11,114	8,891	11,348	10,781	8,625	12,097	10,350	8,280	9,607	9,951	7,961	9,335
	DW	14,038	11,230	15,867	14,345	11,476	13,471	16,128	12,902	14,930	13,800	11,040	12,770	15,100	12,080	22,722	13,968	11,174	10,746

*These measures include program exits from 7/1/11 to 6/30/12.

**These measures include program exits from 1/1/11 to 12/31/11.

***These measures include program exits from 4/1/12 to 3/31/13.