

WorkLink Workforce Development Board
Roster of Workforce Staff

Name	Job Title	Workforce Job Duties/Responsibilities
Trent Acker	Executive Director	Provides strategic leadership on Board initiatives. Also serves as Chief Operating Officer. Oversees the financial management of WorkLink funds. Serves as liaison to the Finance Committee.
Sharon Crite	Youth Services Manager/Education Outreach	Oversees all aspects of youth program offering WIOA and other services to our youth population in the WorkLink region. Serves as liaison to the Youth Committee. Provides education outreach efforts to the public and private education sectors of our tri-county area. Oversees the financial management of Youth contracts.
Windy Graham	Database Contract Manager	Oversees contracts and customer tracking system, provides training and technical assistance, and analyzes performance reports. Also serves as Eligibility Determination liaison and EO Officer. Maintains inventory control system. Oversees the financial management of the in-house budget/accounts payable.
Jennifer Kelly	Program Director	Oversees SC Works System, Operations and WIOA Title I-B Adult and Dislocated Worker programs and grants. Serves as liaison to the SC Works Operations Committee. Oversees the financial management of Adult/DW contracts.
Patty Manley	Office Manager/Business Service Representative	Provides clerical, administrative, and support services to the staff and Board. Coordinates the Business Services Integration Team. Manages Incumbent Worker Training Grants and On-the-Job Training contracts. Develops and implements strategic marketing and outreach.
Contractual		
Brandi Runion	Financial Consultant	Provides financial monitoring, technical assistance, in-house OJT monitoring and supports financial reporting efforts.

SC Works Certification Business Services Standards

BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER

VALUE STATEMENT: The SC Works Center System is focused on understanding business needs and has an effective business services approach for meeting those needs. It plays a key role in regional economic development by aligning resources with economic development and education partners and service delivery strategies based on the workforce needs of businesses.

Standard	Baseline Measures
1. Providing services to the business community is a priority.	<ul style="list-style-type: none"> • All staff recognize businesses as a customer and know where to send them for assistance.
2. The Business Services team operates from a written LWIB business engagement plan designed in response to business needs.	<ul style="list-style-type: none"> • Business Services team targets and serves businesses per LWIB Strategic Plan. • The Business Services team tracks delivery of services in SCWOS against SWIB/LWIBs expected performance.
3. There is a fully integrated multi-agency business services team comprised of representatives from each of the federally mandated partners.	<ul style="list-style-type: none"> • The workforce area has designated business services staff. • Federally-mandated partners who provide services to businesses actively participate on the Business Services Team. • All Business Services Team members are educated on each other's program goals and services.
4. The Business Services team is managed as a unified activity.	<ul style="list-style-type: none"> • The WIB appoints a lead person (may be rotating) to manage the Business Services Team and be the point of contact for regional economic development and business service initiatives. • Business Services Team members identify themselves to businesses as workforce representatives, presenting the full range of relevant/appropriate services to businesses. • A single point of contact/executive account system is utilized for managing business. • There are Business Services Team meetings, virtually or otherwise, at least quarterly. • There is consistent, real time communication between the members of the Business Services team.
5. There is a strong link between the activities of the Business Services team, economic development and education entities.	<ul style="list-style-type: none"> • There is evidence that the Business Services Team maintains partnerships with the appropriate education and economic development agencies. Such evidence includes: <ul style="list-style-type: none"> ○ The relevant economic development agencies and educational entities are engaged in strategic planning sessions and business forums ○ There is sharing of information on new companies relocating to the area; companies leaving the area; expanding and contracting companies; and the occupations/industries expected to expand or decline.
6. Businesses are consulted on the critical success factors for the workforce area.	<ul style="list-style-type: none"> • There is evidence that businesses have been consulted for input on critical success factors through focus groups, written or on-line surveys, and/or targeted interviews. • The workforce area has metrics in place to measure the effectiveness of services provided to businesses.

Standard	Baseline Measures
<p>7. Satisfaction with both processes and outcomes is measured for existing business customers.</p>	<ul style="list-style-type: none"> • A business satisfaction feedback system (survey tools, methods and protocol) are outlined in the Business Engagement Plan. Business satisfaction metrics include a measurement of: <ul style="list-style-type: none"> ➤ staff responsiveness ➤ timeliness ➤ taking of job orders ➤ quality of referrals ➤ testing/assessment/screening ➤ incumbent worker training, on-the-job training, WorkKeys testing and customized training ➤ Rapid Response and outplacement-type services ➤ Integration of marketing and service provision (seamless process) ➤ Timely follow-up with businesses • The workforce area disaggregates the data for analysis and action.
<p>8. The workforce area offers a consistent menu of demand-driven services. (See attached "Menu: SC Works Services to Business").</p>	<ul style="list-style-type: none"> • The workforce area designates which of the consistent menu of services will be available. <ul style="list-style-type: none"> • An expanded menu of no-cost or fee-based services may be offered • Services are posted on the website with links to relevant information • The workforce area indicates what its menu of no-cost and fee-based services will be in its Business Engagement Plan and all business services staff market the benefits of such services regardless of the delivery agent.

Employer Service Strategy and Business Engagement Plan

Serving Employers that are Hiring, Expanding, Laying Off

Business Services Metrics

1. Employer Served Rate

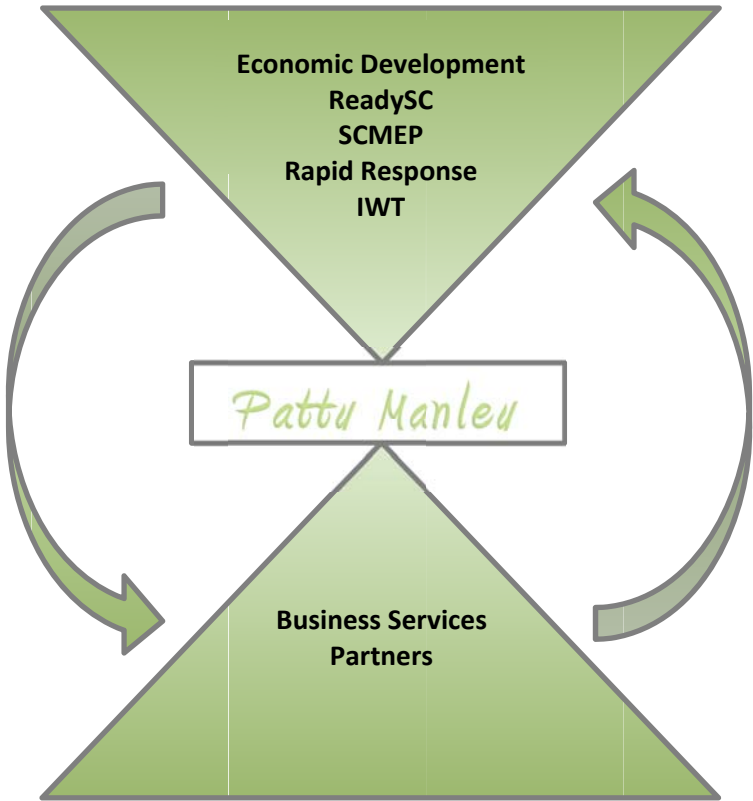
2. New and Repeat User Contacts

3. Positions Filled Rate

4. Positions Filled with 30, 60, and 90 days

5. Employer Satisfaction Rate

Single Point of Contact



Business Products & Services

- Advertising

• Screening

• Assessment

• Employer Based Training

• Rapid Response

Purpose

1. To provide a Labor Exchange model of continuous improvement

A. Meets/Exceeds the needs of employers and local economy

B. Optimizes labor and industry programs for Workforce Development
2. Substantiates and coordinates efforts of employment services, economic development and educational providers

- a. Minimizes duplication of services, provides a single point of contact

b. Maximizes levels of expertise, provides in-demand industry experts.

c. Increases efficiency in communication/information sharing among partners

d. Increases customer retention and satisfaction

Communication Protocol

- Patty Manley will serve as the primary point of contact for Economic Development, readySC, SCMEP, Rapid Response, and IWT. She will funnel all leads to the appropriate Business Service Team member.

• Business Service Team members will be knowledgeable of all labor and industry workforce development programs for employers, and will make appropriate referrals to partner staff to follow-up regarding specific program offerings.

• Communication will be documented through SCWOS and email, and will be immediately relayed via telephone to all appropriate parties. Each Business Service team member will give appropriate updates at team meetings.

- SCWOS Employer Case Notes

• Telephone

• Email

• Business Service Team Meetings

Three Levels of Service

1. Self-Service

• Job Postings (minimal staff contact)

• General Labor Market Information

• General Information on Unemployment Insurance

• Referrals to Professional Testing and WorkKeys Profiling
2. Staff-Assisted Services

• Job Postings

• Applicant Screening

• Recruitment

• Job Fairs and Hiring Events

• Interview Space and Scheduling

• Tax Credits, Community Resources, ADA Assistance

• Partner Program Services
3. Customized Services

• Rapid Response

• Apprenticeships

• On-the-Job Training

• Incumbent Worker Training

• Customized Training

Rules of Engagement

Our primary focus will be to build and maintain relationships with Employers in the WorkLink Region.

Team Members

- WorkLink
- Eckerd - WIOA
- Goodwill Industries
- ResCare – SC JUMMP
- SC DEW – Vets, TAA, WP
- SC DSS
- TCTC
- Economic Development
- AARP
- Vocational Rehabilitation
- readySC™
- Library



Account Management System

The Account Management System will be based on the Board’s high-growth, in-demand industry clusters.

The following partners will be the industry experts.

1. Administrative, Support, Waste Management and Remediation Services
2. Healthcare and Social Assistance
3. Manufacturing
4. Professional, Scientific, Technical Services
5. Retail Trade

Outreach

SHRMs

Anderson –
Oconee –
Pickens -

Manufacturing Groups

Anderson –
Oconee –
Pickens -

Chamber of Commerce Events

Anderson -
Oconee -
Pickens -

Existing Employer Relationships

- Those partners with existing, positive relationships will continue to serve these employers’ per the employers’ wishes.

New Employer Relationships

- Business Service Team members will only provide outreach services to those employers who reside in the WorkLink region.
- For those employers’ seeking employer services outside the WorkLink region, the Business Service Team will work with the appropriate regions’ Business Service Representative to provide services.
- If an employer from outside our region requests a job posting, the Business Service team will refer the employer to the appropriate region’s Business Representative.
- For Self-Assisted services, SCDEW will receive all requests in regards to job postings, LMI, and general UI information.
- For all Staff-Assisted services (except Partner Program Services) – SCDEW will receive all requests.
- For Staff-Assisted services (Partner Program Services) and all Customized Services - The appropriate Partner will be contacted by the team member that reached out to the employer, for the partner to follow-up on employer’s needs.

On-the-Job Training

An Equal Opportunity Employer / Program

Workforce Innovation and Opportunity Act (WIOA) On-the-Job Training (OJT) allows eligible participants the opportunity to gain the skills for a specific occupation by practicing under actual working conditions. Participants are hired as employees of the employer and must meet the minimum qualifications established by the employer in public, private non-profit, or private for-profit sectors. Employers providing an OJT opportunity may be eligible to receive reimbursement for a portion of the hourly pay rate - typically up to 75% - after entering into an OJT contract.

Tips for Employer

Minimum hourly pay rates required

Candidates for OJT must meet the requirements that determine them eligible for WIOA services. OJT candidates must be enrolled as a WIOA participant.

Jobs need to be full-time positions offering benefits within your company.

Call SC Works at 864-646-1515 (TTY: 711) for more information.



**Candidates must
bring
specific
documents
to the WIOA
Eligibility
Appointment!!**

Documents to bring:

Citizenship Verification

- *Social Security Card*
- *State issued ID*

Verification of the following:

- *Address*
- *Age*
- *Employment*
- *Family Income*
- *Highest Level of Education Completed (school records)*
- *Family Size*

If applicable, verification of:

- *Public Assistance*
- *Disability*
- *Military Service*

TABE (Test of Adult Basic Education) required 18-24 years of age

SC WORKS | **BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER**
ANDERSON•OCONEE•PICKENS

WorkLink Workforce Development Board
PY'15 Business Services Integration Team

Janet Price (Anderson County Library)	jprice@andersonlibrary.org
Matt Fields (Eckerd)	MFields@Eckerd.org
Jennifer Campbell (PYC)	jcampbell@eckerd.org
Teresa Young (TCTC - CCE)	tyoung16@tctc.edu
Ray Davidson (SCDEW)	RDavidson@dew.sc.gov
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Patrick Pruitt (DEW Regional Manager)	ppruitt@dew.sc.gov
Leanne Vaughn (DEW Business)	lcobb@dew.sc.gov
Meredith Durham (DEW Business)	LDurham@dew.sc.gov
Susan Stockton (DEW - Vets)	sstockton@dew.sc.gov
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Bobby Brothers (readySC™)	brothers@sctechsystem.edu
Rick Murphy (REC Coordinator)	rmurphy@sccommerce.com
Jennifer Kelly (WorkLink)	jkelly@worklinkweb.com
Trent Acker (WorkLink)	tacker@worklinkweb.com
Patty Manley (WorkLink)	pmanley@worklinkweb.com

MEMORANDUM OF AGREEMENT
WorkLink Workforce Development Board
and
AIM
and
Henkels and McCoy, Inc. (SC Works Programs)

PURPOSE:

In an effort to collaborate and enhance services provided to the community by AIM and the Workforce Innovation and Opportunity Act (WIOA), this agreement is entered into in order to establish the referral and/or co-enrollment processes for Workforce Development funding. Occupational skills trainings are made available through AIM DSS contract funding and in partnership with TCTC for eligible SNAP recipients. WIOA services, including career counseling, tuition funding, and supportive services, are made available as part of this collaboration to those that are eligible to receive funding through the WIOA grants awarded to Henkels and McCoy. This agreement is being entered into between Worklink Workforce Development Board, AIM, and Henkels and McCoy, Inc. (SC Works Programs).

OBJECTIVES:

AIM agrees to:

1. AIM will identify the AIM Point of Contact and communicate this person's information to appointed Henkels and McCoy staff.
2. Provide initial screening (interview) as to AIM client eligibility to participate as a SNAP recipient in the SNAP2WORK E & T program.
3. Determine which clients will be matched with AIM for intensive case management and training or referred to TCTC for training through the DSS SNAP2 Work program. Training must be approved and listed in the DSS SNAP2 Work contract for AIM and TCTC. AIM has the capacity to provide intensive case management for up to fifty (50) WIOA, SNAP2 Work participants as deemed eligible and selected for enrollment in AIM's SNAP2 Work program.
4. As required, maintain records of WIOA participants for referrals and case management.
5. As appropriate, encourage and refer participants into WIOA for employment assistance.

The SC Works Centers will:

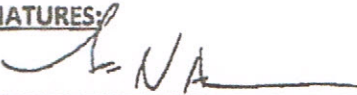
1. Provide a desk, phone, chair, laptop, and the use of a workspace to AIM representatives for the purpose of intake, orientation, and grant services offered under the AIM organization and under the DSS contract. Training and Conference Rooms will be scheduled with the SC Works Center Manager and/or her designee. An AIM representative will have a workspace for the following locations and times:
 - a. Clemson SC Works – Last Tuesday of each month from 1:00pm-4:00pm
 - b. Anderson SC Works – Last Thursday of each month from 1:00pm-4:00pm
 - c. Easley SC Works – TBA (start date October)
 - d. Seneca SC Works – TBA (start date October)
2. Make referrals of verified SNAP recipients to the AIM DSS contract and other services for screening, intake, and co-enrollment into both programs as participants' slots are available.
3. Henkels staff will complete a referral form with required information and email to the AIM point of contact monthly as agreed upon by both Henkels and AIM Staff.
4. Provide career and training services to WIOA and AIM DSS contract participants under the WIOA rules and regulations, such as case management, tuition funding, supportive services, follow-up services, and job placement services. Funding under WIOA is limited and will be subject to a waitlist if funds have been expended or obligated.
5. Provide a dedicated point of contact to discuss funding availability and co-enrolled participant progress and services needed.
6. Provide AIM staff with monthly Ad hoc reports for WIOA co-enrolled participants.

TERMS OF THIS AGREEMENT:

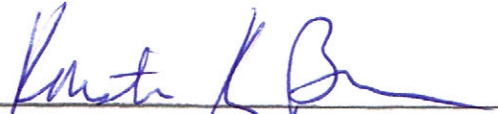
This agreement shall become effective upon the date that all parties have signed and dated the agreement. This agreement shall remain in force until the DSS SNAP grant through AIM has expired (September 30, 2015). This agreement may be renewed with no additional signatures required with up to a one-year extension option, not to exceed the life of the AIM DSS grant. Any additional extensions constitute a new agreement being executed.

All parties will periodically review this agreement throughout the year in a collaborative endeavor to service the citizens of our service area. This agreement may be terminated by the repeal of the Workforce Innovation Opportunity Act of 2014 (WIOA) or any successive legislation, or by other action of law, or by withdrawal for cause of the parties to the agreement. Any party may terminate the agreement at any time for any or no reason by providing a thirty (30) day advanced written notice of termination to all other parties.

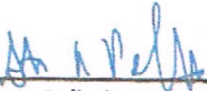
SIGNATURES:



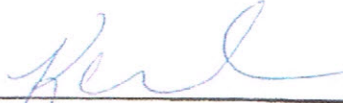
Trent Acker, Executive Director
WorkLink Workforce Development Board



Kristi King-Brock, Executive Director
AIM



Steve Pelissier, Executive Director
SC Appalachian Council of Governments



Kal Kunkel, Regional Manager
Henkels and McCoy, Inc.

AARP FOUNDATION

SCSEPSenior Community Service
Employment Program

SCSEP Host A_

[Main Menu](#)[HA Users Manual](#)[Safety Addendum](#)

Please review the below agreement, at the bottom you will have the opportunity to electronically sign and submit your renewal. If you have any questions please contact your local SCSEP Project Site Office.

Senior Community Service
Employment Program**HOST AGENCY AGREEMENT**

Host Agency: SC Appalachian Council of Governments/WorkLink FEIN: 57-0513623

Address: 1376 Tiger Blvd, Ste 102, Clemson, SC - 29631

Phone: 864-646-1459 Ext:

Fax: 864-646-2814

The above named agency/organization, an equal employment opportunity employer, requests the services of enrollees from the AARP Foundation Senior Community Service Employment Agency.

This Agency is:

A Non-Profit Organization.

(Tax exempt under the Internal Revenue code 501(c)(3))

A Public Organization.

The purpose of this agreement is for the host agency and AARP Foundation to enter into a joint engagement in the SCSEP, under which a participant receives training in a community service assignment while actively pursuing unsubsidized employment. The host agency agrees to provide meaningful training and work experience to the participant(s) in exchange for federally subsidized community service hours by AARP Foundation.

To ensure our host agency partners understand their important role in the daily lives of SCSEP participants and their responsibilities in supporting each participant's goals to enhance or learn new skills and to obtain unsubsidized employment, we ask that each host agency supervisor clearly understand and support the following agency and participant requirements in this agreement:

- 1) The host agency agrees to support SCSEP objectives and will consider hiring participant(s) in permanent employment positions(s), if a vacancy arises.
- 2) The host agency acknowledges that AARP Foundation may reassign participant(s) at any time in accordance with SCSEP rules, regulations, and policies.
- 3) It is understood that the purpose of the SCSEP is for a participant to provide community service while they actively pursue training and unsubsidized employment off of the program. When an individual enrolls and/or gets a job off the program they may lose their public benefits. These benefits may include, but are not limited to: Public Housing, Food Stamps, SSI/SSD, and Medicaid.
- 4) It is understood that participants may miss some hours at the host agency assignment in order to pursue training and unsubsidized employment that is provided outside of the host agency. Participants may be required to do the following activities/tasks:
 - Accept referrals and interviews for employment outside the program;
 - Conduct an ongoing search for unsubsidized employment as specified in the Individual Employment Plan (IEP) and as directed by an AARP Foundation representative;
 - Accept regular transfers to other host agency assignments as necessary to further the participant's training and work experience;
 - Register and maintain registration with the State Employment Service and/or One Stop Center;
 - Attend job search training, job clubs, participant meetings, etc., when offered by the AARP Foundation office, and engage in continuing unsubsidized job search activities.
- 5) It is understood that the SCSEP is short-term, work-training to prepare participants for unsubsidized employment off of the program. The SCSEP is not an entitlement, nor is it designed to solely provide income maintenance. SCSEP participants are in training status, preparing for unsubsidized employment.
- 6) It is understood that training with the host agency is a short-term opportunity, participation in the SCSEP is NOT a job, and participants are NOT employees of either the AARP Foundation or the host agency where they are temporarily assigned.
- 7) It is understood that AARP Foundation SCSEP does not conduct background checks or drug screening on participants. Host agencies may conduct background checks and drug screenings in their sole and exclusive discretion and in accordance with applicable law. The AARP Foundation SCSEP is not financially or otherwise responsible for any costs, expenses or claims associated with background checks or drug screenings.
- 8) The host agency agrees to have a fax machine in good working condition in order to both receive and send participant *Time & Attendance Reports* from and to the AARP Foundation office or designated fax number. "Good working order" includes insuring that the document output settings are correct so that the fax is readable—not overly dark or overly light. Without good fax copies, AARP Foundation SCSEP cannot scan timesheets. If AARP Foundation SCSEP is consistently unable to scan your timesheets, AARP Foundation SCSEP participants cannot be paid and will potentially have to be transferred to a host agency where a fax machine is properly working.
- 9) Host agencies agree to give serious consideration for any permanent job openings in the agency to qualified participants. The host agency agrees to provide supervision, training, and a safe work environment for each assigned participant. The host agency also agrees to the provisions outlined in the *Participant and Host Agency Handbook* as a condition of participation in the SCSEP.
- 10) The host agency agrees to respond to the host agency customer satisfaction survey that is issued by the U.S. Department of Labor (DOL)

If randomly selected. This survey is generally sent out in January, but timing is at the discretion of DOL. If selected, please complete the survey as it influences continued DOL funding for the SCSEP grant. The DOL will make three attempts to obtain a completed survey from a host agency.

11) It is understood that the AARP Foundation is responsible for providing workers' compensation insurance for all participants, in accordance with state law. The host agency is responsible for maintaining a safe working environment for participants during their normal course of duties, and to insure that proper equipment, procedures, and safe practices are used in conformance with state law. AARP Foundation has the right to coordinate onsite safety inspections with the host agency to insure that work procedures, equipment and practices are used to protect the safety of participants. If the host agency fails to adhere to reasonable safe working practices, AARP Foundation has the right to terminate the agreement for cause and for the protection of the participants.

The host agency must keep the following key safety issues in mind at all times:

- No lifting over 20 pounds
- No step stools or ladders
- Participants may not drive unless the assignment, which includes driving, is approved by AARP Foundation
- Participants must always be supervised

12) No participant is authorized to drive as part of his or her assignment without the approval of AARP Foundation. Only in exceptional situations can a participant transport other passengers and only then with the approval of the national SCSEP director. If participant duties include driving a vehicle owned or operated by the host agency, the host agency shall maintain appropriate automobile liability covering participant(s) engaged in the performance of their training assignments using a vehicle owned or operated by the host agency. Applicable statutes will govern the limits of liability for Federal, state, and local government host agencies. A copy of the host agency's certification of insurance and participant's current driver's license and a motor vehicle record (MVR) check is required prior to the driving assignment beginning. Participants will be reimbursed for the cost of the MVR.

If the participant drives his or her own vehicle as part of his or her assignment, the participant must also maintain automobile liability insurance in the appropriate amount covering participant(s) engaged in the performance of their assignments using a vehicle owned or operated by the participant. The host agency shall also reimburse the participant for mileage if the participant drives his or her own vehicle in the performance of the host agency assignment. A copy of the host agency's certification of insurance, the participant's certification of insurance, the participant's current driver's license, and a MVR is required prior to the driving assignment beginning. Participants will be reimbursed for the cost of the MVR.

13) It is understood that the AARP Foundation's SCSEP is federally funded and is required to maintain documentation (timesheets) to substantiate the expenditure of federal funds for wages. It is also understood and agreed to that AARP Foundation SCSEP shall pay the wages of participants assigned to the host agency. The host agency shall not permit participant(s) to perform community service for any hours not in accordance with those expressly authorized by AARP Foundation or to volunteer hours. If the host agency permits participant(s) to perform community service exceeding authorized hours, or to return to community service training assignments without prior authorization from AARP Foundation representative or past the participant's termination date, host agency shall compensate participant(s) for such time. The host agency agrees to verify, sign and return accurately completed timesheets to AARP Foundation SCSEP for processing. Timesheets must be signed by the individual participant and by a responsible supervisory official having firsthand knowledge of the hours worked by the participant. AARP Foundation recognizes that assigned supervisors change and may not always be available to sign participant timesheets. In this case, in lieu of providing the names and signatures of authorized supervisors, by signing this *Host Agency Agreement*, the authorized agency representative agrees to ensure that the participant signs his/her timesheet and that a responsible official of the agency certifies that the reported information on the timesheet is correct.

14) It is understood that it must not use participants as substitutes for permanent employees in the agency. Federal regulations prohibit "maintenance of effort." Participants are additions to, not substitutes for, regular agency staff. Maintenance of effort requirements regarding the use of SCSEP funds specify that a community service assignment for a participant under Title V of the Older Americans Act is permissible only when the following specific maintenance of effort requirements are met. Community service assignments:

- a. Must not reduce the number of employment opportunities or vacancies that would otherwise be available to individuals who are not SCSEP participants;
- b. Must not displace currently employed workers (including partial displacement, such as a reduction in the hours of non-overtime work, wages, or employment benefits);
- c. Must not impair existing contracts or result in the substitution of Federal funds for other funds in connection with work that would otherwise be performed; and
- d. Must not assign or continue to assign an SCSEP participant to perform the same work or substantially the same work as that performed by any other individual who is on layoff.

15) The host agency will be listed on the *Time Attendance Report*. If there are changes to a participant's supervisor, the AARP Foundation SCSEP office must be notified so that the information can be updated in the databases.

16) It is understood that all participant(s) records are subject to the Privacy Act, 5 U.S.C. § 552a, and neither party shall release records without written release signed by participant(s) or otherwise in accordance with law.

17) The host agency shall maintain all records, including original or copies of participant(s) timesheets, relating to this agreement for a period of four years. The host agency shall retain original participant(s) time sheets if faxed to AARP Foundation for payment. AARP Foundation or the DOL, through any authorized representative, shall have access to and the right to examine all records related to this agreement.

18) It is understood that either party may terminate this agreement at any time for any reason upon notification to the other party. The host agency may reject or request the removal of any participant at any time for any lawful reason upon written notification to AARP Foundation.

19) It is understood that any amendment, modification, or addendum to this agreement including changes or modifications to training assignments, must be made by mutual consent of the parties, in writing, signed and dated by both parties, prior to assignment of participant(s) to host agency or any changes being performed.

Below are the Sub site(s) associated with this Host Agency

SC Appalachian Council of Gov / Anderson

SC Appalachian Council of Gov / Easley

SC Appalachian Council of Gov / Oconee

Signature:

Steven R. Polissier

Full Legal

Steven R. Polissier

Name:

Polissier

Title:

Executive Director

Date:

01/15/15

SAFETY IS NO ACCIDENT

06-28-2013

AARP Foundation SCSEP

SC WORKS

WORKLINK

BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER

WorkLink

WIA INSTRUCTION LETTER NO.: PY'10-01 (Revised)

SUBJECT: Local Supportive Service Policy (Adult and Dislocated Worker)

ISSUANCE

DATE: January 26, 2011

EFFECTIVE

DATE: December 8, 2010

EXPIRATION

DATE: Indefinite

PURPOSE: The purpose of this instruction is to establish guidelines for providing supportive services for WIA participants in the local WorkLink Workforce Investment Area.

BACKGROUND: The goal of the Workforce Investment Act is to provide individuals with the resources they need to gain and retain employment that pays self-sufficiency wages. The Act authorizes supportive services for individuals registered in WIA programs who are receiving Intensive, Training or Follow-up Services.

POLICY: The term "Supportive Services" refers to those financial-based or physical accommodations that are reasonable and necessary, and required, in order for a client to participate in activities authorized under Title I of the Workforce Investment Act (WIA). In addition, any adult, or dislocated worker who is enrolled and receiving WIA services, may be eligible for supportive services if they are unable to obtain assistance from other programs providing such services. Youth participating in WIA services should follow the Youth Supportive Service policy. In general, supportive services may include needs-related payments, child care, transportation, housing assistance, and a variety of other related expenses.

Maximum Allowable Limits

- Supportive Services for adults and dislocated workers are available up to a maximum total of \$3,000 per program year.

The availability of and referral to Non-WIA sources is one of the core services that must be made available to adults and dislocated workers through the One-Stop delivery system.

The need for supportive services must be considered when developing the Individual Employment Plan (IEP). **Recipients of supportive services must be considered low-income.**

WIA is a payer of last resort, and so, only if a participant cannot obtain services by other means should WIA provide supportive services. Case Managers must document in case notes efforts to access non-WIA sources to justify providing supportive services through WIA. It will be left to the discretion of the Case Manager that all non-WIA sources of funding have been exhausted. Also, WIA participants must check with local agencies regarding emergency relief funds to address any one-time emergency costs.

An Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request to individuals with disabilities.

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I. Budgetary Plan

When participants request supportive services, the Intensive Service Case Manager must assist the participant with a budgetary plan to ensure that the participant has the means to pay for the services in the future. The budgetary plan also justifies the need to provide supportive services. This plan and the justification are kept in the participant's hard file and documented in a VOS case note.

II. Supportive Service Log

A log is maintained by the Intensive Service Contractor on each supportive service recipient. With this log, the Case Manager ensures that the maximum amount of services is not exceeded. As applicable, the participant file must also contain the referral to supportive services (see attachment), child care vendor agreement, mileage calculation, attendance sheets and justification for paying the supportive service.

III. Supportive Services Available at Assessment

The supportive services available upon enrollment into WIA at Assessment are limited to transportation and childcare expenses, emergency costs, and test fees unless another intensive service is provided that day.

IV. Supportive Service Payment Overview

All supportive service assistance payments issued on behalf of WIA enrolled participants within the Worklink Workforce Investment Area will be issued on the basis of an established and documented need, identified as follows:

- a. Supportive Service assistance payments are limited to the amount necessary to satisfy the emergency and permit the WIA enrolled participants to continue or complete the applicable WIA activity. Payments cannot exceed \$3,000 during a program year without written approval of the Administrative Entity.
- b. A supportive service need that was identified during Assessment.
- c. A need that is identified due to an emergency occurring after the individual became a WIA enrolled participant. Payments can only be made toward relief of situations continuing after the individual becomes a WIA enrolled participant and cannot be made retroactive.
- d. With the exception of transportation reimbursement, all supportive service assistance payments will be issued directly to the vendor providing the needed assistance or service to the WIA enrolled participants (i.e. childcare provider, automotive repair shop, gas or electric utility company, etc.) Under no circumstances will supportive services assistance payments be made directly to the WIA enrolled participants.

V. Who May Receive

Those who may receive supportive service assistance payments include those who meet the following criteria:

- a. Those who are determined low-income, as described in Table 1 of the current WIA 70 percent LLSIL, Instruction Letter PY' 08-12, Update for WIA Family Income and Self-Sufficiency Guidelines. **Note:** Initial determination for Supportive Services will be based on low-income status as notated on the Eligibility Determination application for WIA

assistance. If a participant is not low-income at the time of application, a participant may re-apply for supportive services after six months. (WIA staff should use the attached application and the same procedures to determine low-income as that of Eligibility Determination.)

- b. Those who are actively participating in a WIA activity, that requires travel for more than one day in length, for which he or she may not otherwise be able to continue or complete without supportive services assistance. There must be at least one open activity in VOS.
- c. For participants in follow-up, there is no need for an open activity. In these cases, an entry in the case notes is required.
- d. Those who have established a supported or documented allowable need for assistance.
- e. Those who have presented documentation or evidence that all other reasonable means for getting non-WIA assistance/support have been exhausted.
 - i. For childcare assistance – applicant must have proof of ABC Voucher eligibility determination
 - ii. For transportation – applicant must have proof of valid driver's license
 - iii. For car repairs – applicant must provide two quotes from licensed repair facilities and proof of ownership (i.e., name listed as a driver on insurance, registration, car title, etc.)
- f. Those who are in need of employment related assistance during their normal 12-month follow-up period.

VI. Allowable Supportive Services for WIA Participants in Intensive or Training Services
For both adult and dislocated worker services

Medical Assistance – Limited funding is available to provide medical services required for an individual to participate in intensive services and/or training also to obtain or retain unsubsidized employment. Payments for medical assistance should be made to the provider not the participant. The maximum amount that can be paid per participant is \$500 during participation in the program.

Allowable Medical Assistance

- Pre-employment/training physicals required by an employer or training program
- Immunizations
- Pre-employment drug tests
- Dental extractions and dentures
- Eyeglasses but not contact lenses or any type of eye surgery
- Hearing devices

Work Clothing or Uniforms – Supportive Service funding can be provided for work clothing or uniforms required but not paid by an employer or training program. Clothing and uniforms include steel-toed shoes, hard hats, smocks, etc. Individuals needing general-purpose clothing should be referred to a community clothes bank or other agency. The maximum amount for work clothing is \$150 during participation in the program.

Training-Related Equipment - Pays for training related equipment not already covered, such as books and supplies.

Background Checks – Pays for background checks, such as, motor vehicle records check, criminal records (SLED), etc. when required by the occupation or employer.

Test fees - Pays for fees related to obtain certification, such as real estate license, driver's license, GED fees, etc.

Driver's Training - Pays for driver's training. This does not include CDLs.

One-time Emergency Costs* -

Minor Car Repair - Minor Car Repair should not exceed \$250.00.

Utilities - Pays for electric, water or gas bill. Excludes telephone bills.

Housing - Pays for housing cost, such as rent.

*One-time emergency costs exceeding \$1000.00 must be approved by the Administrative Entity.

Childcare or Dependent Care – Participants who have out-of-pocket expenses associated with attending training/activities may receive childcare assistance. Reimbursements are linked to attendance if a participant is absent from training, a reimbursement may not be made for that day. For childcare supportive service assistance, vendor agreements and invoices are required documentation that must be kept in the participant's hard file.

\$20 a day for pre-school children

\$8 a day for school-age children 12 years old and younger and for dependent adults

Online Classes - If a participant is taking an approved online class and the Intensive Services Case Manager determines a need for childcare or dependent care, the payment will be based on login and logout times into the approved online class. The participant will be responsible for the following:

- Documentation of class attendance – print screens of the login and logout screens, clearly indicating the date, time and proof of the class. *No payment will be made for insufficient documentation.*
- Provision of documentation for payment – documentation should be given to the assigned Intensive Services Case Manager in a timely manner.
- For transportation reimbursement payments to be made while attending a virtual class, a Case Manager must document by case note that the participant is traveling to a location other than their residence to participate in the online training.

Direct Transportation – If a participant is unable to attend an activity or training because he or she lacks a driver's license and/or access to a car, the case manager may provide or procure transportation. Transportation will be provided temporarily while participants make a transition plan to provide their own transportation.

Case managers should consider cost when procuring transportation. Public transportation should be utilized when available. Arrangements may be made with other agencies that transport participants and for-profit businesses may be utilized. The grantee should have an agreement with the transportation provider specifying the cost and billing arrangements. Grantees may choose to pay private individuals selected by participants to provide transportation. Prior to using a private individual to provide transportation, the grantee must verify the individual has a valid driver's license and insurance.

Transportation Reimbursement – Participants not receiving direct transportation services may receive transportation assistance to help defray the out-of-pocket expenses associated with activities/training. For those (1) attending approved training full-time, (2) not receiving other transportation funds from partner programs, and (3) traveling more than 10 miles one way to a training provider, reimbursement will be \$5 per day of training attended. An authorized training instructor must sign the attendance sheet prior to reimbursement.

VII. Allowable Needs-Related Payments (NRP) for WIA Participants in Intensive or Training Services

For both adult and dislocated worker services – can be received in conjunction with other supportive service payments and is subject to the \$3,000 supportive service cap per year

NRP may be provided to unemployed adults and dislocated workers if the eligible client has been enrolled in an allowable training activity.

NRP are available for adults and dislocated workers who meet the following criteria:

A. Specific eligibility requirements for adults

1. Must be unemployed;
2. Does not qualify for, or has ceased to qualify for, Temporary Assistance for Needy Families (TANF) or unemployment compensation; and
3. Must be enrolled in a program of training services under WIA/TAA.

Adult and Dislocated Worker Program Needs-Related Payments – Eligible adults and dislocated workers may be certified to receive a needs-related payment in the amount of \$2.50 per hour for active participation in training services (not to exceed a weekly maximum of \$100). Time and attendance sheets are to be used to ensure adequate participation in training services and are to be submitted along with each needs-related payment request. Please note this applies to adults and dislocated workers who do not qualify for the receipt of weekly unemployment insurance (UI) payments or Trade Readjustment Assistance (TRA) at the point of registration in the WIA program. Adults and dislocated workers who were receiving UI payments or TRA at the point of registration in WIA but exhaust such assistance may be certified eligible to receive a *Continuance Needs-Related Payment*.

The amounts to be paid are based on a set rate only for the actual number of hours the client is enrolled and/or participating in a training activity. All documentation and eligibility determination is the sole responsibility of the Intensive Services Provider.

B. Specific eligibility requirements for dislocated workers

1. Must be unemployed; and
2. Have ceased to qualify for unemployment compensation or trade readjustment allowance under TAA or NAFTA-TAA, and
3. Must be enrolled in a program of training services under WIA/TAA.

Continuance Needs-Related Payment – Eligible adults and dislocated workers who exhaust UI payments or TRA after registration in the WIA program may receive a weekly payment up to the amount received under UI or TRA for active participation in training services, not to exceed \$100 per week. This may enable the participant to continue receiving the same level of income maintenance as when they first entered the program. The participant must provide proof of the status of their UI or TRA weekly payment amount during the needs-related payment certification appointment. Time and attendance sheets are to be used to ensure adequate participation in training services and are to be submitted along with the needs-related payment request. **NOTE: In order to qualify for this type of needs-related payment, the WIA customer is required to attend 100% of approved training each week.**

Needs-related payments are not wages but training payments used to assist participants with related costs for participating in training services. Needs-related payments are not subject to tax withholdings.

The case manager and participant must complete the Needs Related Payment Approval to document the need. In the event a waiver is required, this completed form is to be submitted with the waiver request.

VIII. Allowable Supportive Services for WIA Participants in Work Based Activities

Such as OJT, Work Experience, short-term skills training, and Paid Internships

Participants who need help transitioning to self-sufficiency while in the above activities may be eligible for the following services:

Direct Transportation – described above for the duration of not more than 2 months.

Transportation Reimbursement – described above. Rates are half the rates listed above.

Childcare or Dependent Care – described above. Rates are half the rates listed above. Also, see attached Supportive Service Reference Sheet.

IX. Allowable Supportive Services for WIA Participants in follow-up

Supportive service needs should be addressed while a participant is still active. In limited cases individuals who have exited, but are at risk of losing their job, may receive supportive services

while in the follow-up period, provided that there is funding remaining in their supportive services account.

The availability of post-placement supportive service assistance is limited and will be determined individually based on the following criteria:

1. The individual has a substantial supportive service need in order to meet employment goals set in their Individual Employment Plan.
2. The supportive service is not available through another source.
3. The individual's resources do not allow the participant to fully pay for the service. In reviewing the individual's resources, one of the following criteria must be met for the participant to be considered:
 - a. The participant was economically disadvantaged at the time of eligibility determination.
 - b. Receives income-based government assistance including TANF, SNAP, SSI, public housing assistance, or is a resident of a shelter.
 - c. Has been unemployed for more than three months prior to start of the job.

Supportive Services for participants in follow-up may not be in the form of cash payments and can only be provided to assist a participant in retaining his/her job. For participants in follow-up, there is no need for an open activity. However, a case note is required to document supportive services provided to participants in follow-up. The Follow-Up Services Contractor should determine need for supportive services received during Follow-Up.


X. Supportive Services NOT Allowable for WIA Participants

- a. Legal or punitive services costs, which includes child support or driver's license reinstatement fees.
- b. Payments for food or food items.
- c. Payments for automobile payments, insurance, taxes, and tags.
- d. Personal debt or obligation that occurred before WIA registration.

ACTION: WorkLink Workforce Investment Area Grantees must abide by the policy as stated. All staff must be familiar with the policy. All other forms of supportive service requests not listed must be made in writing to the Administrative Entity.

Please copy and distribute this information appropriately within your agency.

INQUIRIES: Direct all inquiries on this Instruction Letter to the WorkLink Workforce Investment Board staff, WorkLink, 511 Westinghouse Road, Pendleton, SC 29670, telephone 864.646.1515, fax 864.646.2814, or e-mail rallen@worklinkweb.com.


Ronnie Allen, Executive Director
WorkLink Workforce Investment Board

DISTRIBUTION: All WIA/TAA staff

FOUR ATTACHMENTS:

- 1 - Referral to Supportive Services
- 2 - Supportive Services Reference Sheet
- 3 – Supportive Service Payment Services Form
- 4 – Family Size Definition

REFERRAL TO PARTNER SERVICES FORM

NAME: _____ SS# _____

ADDRESS: _____

PHONE: _____ DATE: _____

REFERRED BY: _____ AGENCY PHONE: _____

REFERRED TO

- ☐ ADULT EDUCATION
- ☐ VOCATIONAL REHABILITATION
- ☐ HOUSING AUTHORITY
- ☐ JOB CORPS
- ☐ TELAMON
- ☐ AARP
- ☐ OTHER: _____

REASONS: _____

APPOINTMENT DATE: _____ TIME: _____

PLACE: _____

☐ ACCEPTED COMMENTS: _____

☐ NOT ACCEPTED REASON: _____

SERVICE PROVIDER SIGNATURE: _____

PHONE: _____ DATE: _____

Supportive Service Reference Sheet

Maximum amount allowable in one year	\$3,000.00
Childcare/dependent care each day	
Pre-School Children	\$20
School-age Children up to 12 years old	\$8
Dependent Adults	\$8
One Time Emergency Costs	
Minor Car Repair (maximum)	\$250.00
Maximum one time payment without WorkLink approval	\$1000.00
Transportation Reimbursement	
Less than 75 miles	\$10
76-150 miles	\$20
151-224 miles	\$30
225 miles or greater	\$40
For Any Participant in Work Based Training	
<i>Childcare/dependent care each day</i>	
Pre-School Children	\$10
School-age Children up to 12 years old	\$4
Dependent Adults	\$4
<i>Direct Transportation is available for a maximum of two months</i>	
<i>Transportation Reimbursement</i>	
Less than 75 miles	\$5
76-150 miles	\$10
151-224 miles	\$15
225 miles or greater	\$20
Supportive Services available after enrollment and before other activities	
Transportation	
Childcare/Dependent care	
Emergency Costs	
Test Fees	

Notes: WIA is always the payer of last resort. Efforts to obtain supportive services through other agencies must be documented.

Supportive Service Payment Approval Form

Section I: Client Information

Name _____ Date of Request _____

State Id: _____ Adult ☐ DW ☐ Formula ☐ ARRA ☐ Other: _____

1. Is the client currently unemployed? Yes ☐ No ☐ If No, ineligible for Needs Related Payments.
2. Does the client receive TANF or qualify for UI or Trade Adjustment Assistance or North American Free Trade Agreement? Yes ☐ No ☐ If yes to UI or TRA, ineligible for Needs Related Payments
3. Has the client provided appropriate documentation (if applicable) for any supportive services Requested? Yes ☐ No ☐ If yes, attach documentation.

Section II: Eligibility

List all persons in household today	Ages	# of Months*	Source of Income**	Included? (Y/N)	Wage	6 Month Total
Number counted in family***		Grand Total				
Multiply by 2, Yearly Total						

*Number of Months living in household

**Attach documentation

***See Family definition

4. Does yearly income exceed the federal poverty guidelines for the family size? Yes ☐ No ☐
If Yes, Stop. Client is ineligible.

III. Supportive Services

Type*	Need Determined/Eligible		Estimated Amount
Medical Assistance	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Clothes/Uniforms	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Work Related Equipment	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Background Check	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Tests	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Driver's Tests	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Car Repair (Requires two quotes and proof of ownership)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Electric, Gas, Water Bill (Copy of the bill)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Housing, excludes mortgage payments	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Childcare (Requires proof of TANF determination)	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Transportation	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
Needs Related Payments**	Yes <input type="checkbox"/>	No <input type="checkbox"/>	
ESTIMATED GRAND TOTAL			

*Cannot exceed the maximum amounts as outlined in Supportive Services Policy. Documentation must be attached to application; otherwise client is ineligible for that particular supportive service. ** To be eligible for Needs Related Payments, Question 1 must be YES; Question 2 must be NO. Documentation of proof of UI or TAA status must be attached. Reference Needs Related Payment Portion of Supportive Service Policy for further clarification.

Applicant Signature _____ Date _____

CM Signature _____ Date _____

Family Size

WIA definition of Family:

Two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:

- A. A husband, wife and dependent children;
- B. A parent or guardian and dependent children;
- C. A husband and wife.

Any individual not meeting the above definition of family is considered to be a family of one.

Exception: An applicant who has a *disability that substantially affects his/her ability to gain employment* may be considered as a family of one. Documentation of the substantial disability must be verified in writing and maintained in the applicant's hard copy case file.

Family Size is determined based on the total number of individuals meeting the above definition during the 6 months prior to application.

The State is providing the following clarifications to the definition of family:

- References to "*dependent children*" do not include grandchildren unless the grandparents are legal guardians (determined by court order) for the grandchildren or have adopted the grandchildren.
- For Category B, references to "*guardian*" refer to "*legal guardian*". Legal guardianship is determined by court order.
- The phrase "*living in a single residence*" includes temporary, voluntary residence elsewhere such as attending school or college, or visiting relatives. It does not include involuntary temporary residence elsewhere, such as incarceration or placement into foster care as result of a court order.
- For Categories A and B, "*dependent children*" shall include:
 - Any child, age 14-17; or
 - Any child age 18-25 who is a full-time student dependent on the parent or guardian for more than 50% of his/her support;
 - Any child over the age of 17 who did not provide more than 50% off his/her own support for the 6 months prior to application. This includes adult children of any age.

Note: Applicants over age 17 who would ordinarily be included as part of a family, but claim to be no longer dependent on the parent/guardian, must complete a written statement, justifying that he/she has provided more than 50% of his/her own support (food, shelter, etc.) for the last 6 months. This statement should include the amount and source(s) of his/her personal income, and the type and amount of expenses that the individual has covered for the last 6 months. Additional documentation of income, such as check stubs, may be required to verify the applicant's income.

- The State of South Carolina recognizes *common law marriage*. Individuals claiming to be married by common law must meet the following criteria:
 1. Both parties must be free to enter into the common law marriage. In other words, neither party may be married to another individual. If previously married, the marriage must have been annulled or the divorce must be final.

And

2. The couple must present themselves as married to the public.

Individuals meeting the criteria listed above for common law marriage will be considered as married under the WIA definition of marriage.

WorkLink

WIOA INSTRUCTION LETTER NO.: PY'10-02 Revised

SUBJECT: Local Supportive Service Policy-Youth

ISSUANCE

DATE: August 27, 2014

EFFECTIVE

DATE: September 30, 2015

EXPIRATION

Date: Indefinite

PURPOSE: The purpose of this instruction is to establish guidelines for providing supportive services for WIOA participants in the local WorkLink Workforce Development Area.

BACKGROUND: The goal of the Workforce Innovation and Opportunity Act is to provide individuals with the resources they need to gain and retain employment that pays self-sufficiency wages. The Act authorizes supportive services for individuals registered in WIOA programs who are receiving training or follow-up Services.

WIOA requires that supportive services be provided only to those unable to obtain services through other funding sources. Supportive services are provided as necessary to assist an individual in meeting their employment goals. Funding decisions should be made on a case-by-case basis, and the guidelines below are to assist staff in administering equitable and fair supportive services to participants.

At assessment, participants are asked about their resources and support network. Participants who lack services, skills, or resources to get or keep a job are identified by the Assessment Specialist and are provided community resource information that can be used to meet those needs. Referrals are made as appropriate to partner agencies and other community services.

POLICY: WIOA is a payer of last resort, and so, only if a participant cannot obtain services by other means should WIOA provide supportive services. Case Managers must document in case notes efforts to access non-WIOA sources to justify providing supportive services through WIOA. It will be left to the discretion of the Case Manager that all non-WIOA sources of funding have been exhausted. Also, WIOA participants must check with local agencies regarding emergency relief funds to address any one-time emergency costs.

A proud partner of the  American Job Center network

An Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request to individuals with disabilities.

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Budgetary Plan

When participants request supportive services, the Case Manager must assist the participant with a budgetary plan to ensure that the participant has the means to pay for the services in the future. The budgetary plan also justifies the need to provide supportive services. This plan and the justification are kept in the participant's hard file and documented in a VOS case note.

Supportive Service Log

A log is maintained by the Case Manager on each supportive service recipient. With this log, the Case Manager ensures that the maximum amount of services is not exceeded. As applicable, the participant file must also contain the referral to supportive services (see attachment), childcare vendor agreement, invoices, mileage calculation, attendance sheets, and justification for paying the supportive services.

Supportive Services Needs Determined at Assessment

The supportive services needs determined upon enrollment into WIOA at assessment are limited to transportation and childcare expenses, emergency costs, and test fees.

Supportive Service Payment Overview

All supportive service assistance payments issued on behalf of WIOA enrolled participants within the WorkLink Workforce Development Area will be issued on the basis of an established and documented need, identified as follows:

- a. Supportive Service assistance payments are limited to the amount necessary to satisfy the emergency and permit the WIOA enrolled participants to continue or complete the applicable WIOA activity. Payments cannot exceed \$3,000 per program one year without written approval of the Administrative Entity.
- b. A supportive service need that was identified during Assessment.
- c. A need that is identified due to an emergency occurring after the individual became a WIOA enrolled participant. Payments can only be made toward relief of situations continuing after the individual becomes a WIOA enrolled participant and cannot be made retroactive.
- d. With the exception of transportation reimbursement, all supportive service assistance payments will be issued directly to the vendor providing the needed assistance or service to the WIOA enrolled participants (i.e. childcare provider, automotive repair shop, gas or electric utility company, etc.) Under no circumstances will supportive services assistance payments be made directly to the WIOA enrolled participants.

Who May Receive

Those who may receive supportive service assistance payments include those who meet the following criteria:

- a. Those who are actively participating in a WIOA activity for which he or she may not otherwise be able to continue or complete without supportive services assistance. There must be at least one open activity in VOS.
- b. For participants in follow-up, there is no need for an open activity. In these cases, an entry in the case notes and supporting documentation in case file is required.
- c. Those who have established a supported or documented allowable need for assistance.
- d. Those who have presented documentation or evidence that all other reasonable means for getting non-WIOA assistance/support have been exhausted.
- e. Those who are in need of employment related assistance during their normal 12-month follow-up period.
- f. Those who are not qualified for unemployment insurance compensation as well as those who have exhausted unemployment while registered in a WIOA activity.

Allowable Supportive Services for WIOA Participants in Training Services - Youth Services

- Medical Assistance – Limited funding is available to provide medical services required for an individual to participate in youth activities and/or training also to obtain or retain unsubsidized employment. Payments for medical assistance should be made to the provider not the participant. The maximum amount that can be paid per participant is \$500 during participation in the program.

Allowable Medical Assistance

- Pre-employment/training physicals required by an employer or training program
- Immunizations
- Pre-employment drug tests
- Dental extractions and dentures
- Eyeglasses but not contact lenses or any type of eye surgery

- Work Clothing or Uniforms – Supportive Service funding can be provided for work clothing or uniforms required but not paid by an employer or training program. Clothing and uniforms include steel-toed shoes, hard hats, smocks, etc. Individuals needing general-purpose clothing should be referred to a community clothes bank or other agencies. The maximum amount for work clothing is \$150 during participation in the program.
- Training Related Equipment – Pays for training related equipment not already covered, such as books and supplies.
- Background Checks – Pays for background checks, such as, motor vehicle records check, criminal records (SLED), etc. when required by the occupation or employer.
- Test fees – Pays for fees related to obtain certification, such as real estate license, driver's license, GED fees, etc.
- Driver's Training – Pays for driver's training. This does not include CDL's.
- One-time Emergency Costs * - A one-time minor car repairs should not exceed \$500. A one-time utility cost of electric, water or gas bill, excludes telephone bills. A one-time housing costs, includes rent but excludes mortgage payments.
- Child Care or Dependent Care – Participants who have out-of-pocket expenses associated with attending training/activities may receive childcare assistance. Reimbursements are linked to attendance if a participant is absent from training, a reimbursement may not be made for that day. For childcare supportive service assistance, vendor agreements and invoices are required documentation that must be kept in the participant's hard file.
 - \$20 a day for pre-school children
 - \$8 a day for school- age children 12 years old and younger and for dependent adults
- Online Classes – If a participant is taking an approved online class and the Case Manager determines a need for childcare or dependent care, the payment will be based on login and logout times into the approved online class. The participant will be responsible for the following:

- Documentation of class attendance – print screens of the login and logout screens, clearly indicating the date, time and proof of the class. *No payment will be made for insufficient documentation.*
- Provision of documentation for payment – documentation should be given to the assigned Case Manager in a timely manner.

For transportation reimbursement payments to be made while attending a virtual class, a Case Manager must document by case note that the participant is traveling to a location other than their residence to participate in the online training.

- Direct Transportation – If a participant is unable to attend an activity or training because he or she lacks a driver's license and/or access to a car, the case manager may provide or procure transportation. Transportation will be provided temporarily while participants make a transition plan to provide their own transportation.

Case managers should consider cost when procuring transportation. Public transportation should be utilized when available. Arrangements may be made with other agencies that transport participants and for-profit businesses may be utilized. The grantee should have an agreement with the transportation provider specifying the cost and billing arrangements. Grantees may choose to pay private individuals selected by participants to provide transportation. Prior to using a private individual to provide transportation, the grantee must verify the individual has a valid driver's license and insurance.

Grantees can arrange for transportation of groups for workshops, youth field trips, etc. If the grantee arranges for group transportation, individual participants will not be required to develop a transportation plan.

- Transportation Reimbursement – Participants not receiving direct transportation services may receive transportation assistance to help defray the out-of-pocket expenses associated with activities/training. Payments are made according to the distance driven per week. Grantees should take into account any absences during the week and adjust the mileage allowance accordingly.

Rates

Less than 75 miles	\$20
76 -150 miles	\$40
151 – 224 miles	\$60
225 miles or greater	\$80

Supportive Services NOT Allowable for WIOA Participants

- a. Legal or punitive services costs, which includes child support or driver's license reinstatement fees.
- b. Payments for food or food items.
- c. Payments for automobile payments, insurance, taxes or tags.
- d. Personal debt or obligation that occurred before WIOA registration.

Please copy and distribute this information appropriately within your agency.

INQUIRIES: Direct all inquiries on this Instruction to the WorkLink Workforce Development Board Staff. Youth inquiries should be directed to Sharon Crite, Youth Services Manager/education Outreach, telephone 864.646.1828 or email scrite@worklinkweb.com.



Mr. Trent Acker, Executive Director
WorkLink Workforce Development Board

DISTRIBUTION: All WIOA staff

ATTACHMENTS: Supportive Services Reference Sheet

Supportive Service Reference Sheet

Maximum amount allowable in one year	\$3,000.00
Childcare/dependent care each day	
Pre-School Children	\$20
School-age Children up to 12 years old	\$8
Dependent Adults	\$8
One Time Emergency Costs	
Minor Car Repair (maximum)	\$500
Transportation Reimbursement	
Less than 75 miles	\$20
76-150 miles	\$40
151-244 miles	\$60
225 miles or greater	\$80
Supportive Services available after enrollment and before other activities	
Transportation	
Childcare/Dependent Care	
Emergency Costs	
Test Fees	

Notes: WIOA is always the payer of last resort. Efforts to obtain supportive services through other agencies must be documented.

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An Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request to individuals with disabilities.

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WorkLink

EMPLOYMENT AND TRAINING INSTRUCTION LETTER NO.: 15-007

SUBJECT: Work Based Learning Policy for Adults and Dislocated Workers

ISSUANCE

DATE: November 11, 2015

EFFECTIVE

DATE: November 11, 2015

EXPIRATION

DATE: Indefinite

PURPOSE: This is a WorkLink local instruction letter approved by the WorkLink Workforce Development Board.

BACKGROUND: The WIOA Adult and Dislocated Worker programs, in coordination with Wagner-Peyser (WP) Employment Service (ES), are pivotal pieces of the SC Works delivery system, which is the foundation of the workforce system. The system provides universal access to career services to meet the diverse needs of adults and dislocated workers. WIOA made some significant reforms to how services are delivered in the SC Works system. Among the reforms made, WIOA enhances access and flexibility for work-based training options, such as Registered Apprenticeships, on-the-job training, customized training and incumbent worker training.

POLICY: Under WIOA there are additional work-based training options and flexibilities for adults and dislocated workers:

Registered Apprenticeship (RA)

WIOA emphasizes the importance and value of Registered Apprenticeships as a component of potential training and employment services that the workforce system can provide to its customers. A two-fold benefit, Registered Apprenticeships may be used as a career pathway for job seekers and as a job-driven strategy for employers and industries.

Section 122(a)(3) of WIOA provides a new opportunity for Registered Apprenticeship programs to be more directly connected to the public workforce system. Registered Apprenticeships automatically qualify to be placed on WorkLink's Eligible Training Provider List (ETPL), allowing ITAs to support participants in Registered Apprenticeship programs, and more directly connect those programs to SC Works centers. Staff is strongly encouraged to promote registered apprenticeships in our area and work with Apprenticeship Carolina in order to register apprenticeship programs with Department of Labor.

In order for WIOA funds to be invested in Registered Apprenticeships, the employer or intermediaries providing the Apprenticeship training has:

- (1) An Apprenticeship registered with Department of Labor (DOL);
- (2) Has applied, been approved, and placed on the Eligible Training Provider List; and

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(3) And has met all qualifications consistent with the Work Place Safety checklist.

The following are examples of registered apprenticeships that may be placed on the Eligible Training Provider List:

- Employers who provide related instruction: A number of employers with RA programs provide formal in-house instruction as well as on-the-job training (OJT) at the work site.
- Employers who use an outside educational provider: Under this model RA program sponsors do not provide the related instruction or educational portion of the apprenticeship, but rely upon an outside educational entity to deliver instruction.
- Employers can use two- or four-year post-secondary institutions, technical training schools or on-line courses for related instruction. The employer is the ETP and must identify their instructional provider.
- Joint Apprenticeship Training Programs: These programs are made up of employers and unions. They have an apprenticeship training school where the instructional portion of the apprenticeship program is delivered. The training schools are usually administered by the union, in which case the union would be the ETP.
- Intermediaries: Intermediaries can serve as program sponsors when they take responsibility for the administration of the apprenticeship program. They also can provide expertise such as curriculum development, classroom instruction and supportive services, as appropriate. The intermediary is the ETP and must identify the instructional provider if an outside organization is providing the educational portion of the apprenticeship. Intermediaries include:
 - Educational institutions including two- and four-year post-secondary institutions or technical schools. In this model the educational institution administers the program, works with employers to hire apprentices and provides classroom or online instruction for the apprenticeship program;
 - Industry associations that administer the program and work with employer/members and educational entities to implement the apprenticeship program; and
 - Community-based organizations that administer the program and work with employers, educational entities and the community to implement the apprenticeship program.

WIOA training services may be used in conjunction with Registered Apprenticeship programs in the following ways:

- An ITA may be developed for a participant to receive RA training;
- An OJT contract may be developed with a RA program for training participants. OJT contracts are made with the employer, and RA generally involves both classroom and on-the-job instruction. The OJT contract may be made to support some or all of the OJT portion of the RA program;
- A combination of an ITA to cover the classroom instruction along with an OJT contract to cover on-the-job portions of the RA is allowed; and
- Incumbent worker training may be used for upskilling apprentices who already have an established working/training relationship with the RA program.

The Business Service Liaison and/or Career Coach may determine the appropriate funding by Registered Apprenticeship opportunity. The cap for an apprenticeship will not exceed \$5,000 in a program year or \$10,000 in a lifetime. The apprenticeship cap will include the total of the OJT and the occupational training amounts.

Supportive services may be used in coordination with career and/or training services, to participants in a RA program. These supportive services must be consistent with WIOA section 134(d)(2), Section 12, state policies, and the WorkLink Workforce Development Board Supportive Service policy.

The Staff member responsible for the case will enter a Registered Apprenticeship activity code for these participants. See the Adult Activity Code Definitions located in the Staff Online Resources page of SCWorks Online Services:

- 334, Registered Apprenticeship- Classroom Training
- 358, Registered Apprenticeship- OJT

On-the-Job Training

OJT continues to be a key method of delivering training services to adults and dislocated workers. WIOA allows for up to 50 percent of the wage rate of the participant to be reimbursed to employers for the costs of training while the participant is in the program. However, WIOA also allows local areas to increase the reimbursement level to up to 75 percent when taking into account the following factors:

- The characteristics of the participants (e.g. length of unemployment, current skill level, and barriers to employment);
- The size of the employer (e.g. small and medium-sized business often have more barriers to participation at lower reimbursement rates);
- The quality of employer-provided training and advancement opportunities; and
- Other factors the State or local boards may determine appropriate (e.g. the number of employees participating in the training, wage and benefit levels of the employees (both pre and post participation earnings)), and relation of the training to the competitiveness of the participant).

WorkLink will reimburse according to the following:

Employers providing an OJT can receive reimbursement for a portion of the hourly pay rate – typically up to 50%--which is considered payment for extraordinary costs to the employer associated with training a new employee.

WorkLink will increase the employer reimbursement for on-the-job training (OJT). This waiver permits the following reimbursement amounts: 1) up to 75% for employers with 1-250 employees. For employers with more than 250 employees, the statutory requirement of up to 50% applies.

WorkLink will also use a sliding scale for employer reimbursement based on the length of the participant's unemployment. Reimbursement amounts are as follows: 1) up to 75% employer reimbursement where OJT is provided to individuals unemployed for 16 weeks or more, and 2) where OJT is provided to individuals unemployed less than 16 weeks, the current statutory requirements of 50 percent will apply.

Staff will evaluate each business based on employee counts first, and then based on the number of weeks the jobseeker being placed on the OJT contract is unemployed. The OJT contract may be written for whichever provides the highest reimbursement rate. A staff member may evaluate each employer and reimburse at a lower percentage amount if warranted. Justification should be documented in the case file.

Incumbent Worker Training

Incumbent Worker training provides both workers and employers with the opportunity to build and maintain a quality workforce. Incumbent Worker training can be used to help avert potential layoffs of employees, or to increase the skill levels of employees so they can be promoted within the company and create backfill opportunities for the employers. Under section 134(d)(4) of WIOA, local boards can use up to 20 percent of their adult and dislocated worker funds to provide for the federal share of the cost of providing Incumbent Worker training. Incumbent Worker training needs to take into account the following factors:

- The characteristics of the participants in the program;
- The relationship of the training to the competitiveness of a participant and the employer; and
- Other factors the State or local boards may determine appropriate (e.g., the number of employees participating in the training, wage and benefit levels of those employees (both pre- and post-participation earnings)), and the existence of other training and advancement opportunities provided by the employer).

Employers are required to pay for a significant cost of the training for those participants in incumbent worker training; this can be done through both cash and/or in-kind payments. The wages paid to participants, while in training, may be considered as a source of matching funds.

Rules for matching funds are provided in the Uniform Guidance and DOL exceptions at 2 CFR 200.306 and 2 CFR 2900.8, respectively. Under section 134(d)(4)(D) of WIOA, the minimum amount of employer share in the Incumbent Worker Training depends on the size of the employer:

- At least 10 percent of the cost, for employers with 50 or fewer employees;
- At least 25 percent of the cost, for employers with 51 to 100 employees; and
- At least 50 percent of the cost, for employers with more than 100 employees.

In order for Incumbent Worker to be funded at this level, the Board must first approve up to 20% of local allocations to be designated by the Board in its budget.

An ad hoc committee will determine the process for soliciting and allocating IWT contract awards.

Transitional Jobs

Transitional jobs are a new type of work-based training that is allowed under WIOA.

Transitional jobs are time-limited work experiences that are subsidized and are in the public, private, or nonprofit sectors for individuals with barriers to employment who are chronically unemployed or have an inconsistent work history, and are combined with comprehensive career and supportive services. The goal of transitional jobs is to establish a work history for the individual that demonstrates success in the workplace, and develops the skills that lead to entry into and retention in unsubsidized employment. Unlike OJT, there is no assumption that the individual will be retained in their transitional job after the experience is over, though that would be a successful experience and outcome. Under section 134(d)(5) of WIOA, local boards may use up to 10 percent of their adult and dislocated worker funds to provide transitional jobs to individuals.

If local areas choose to use transitional jobs as part of their service delivery strategy, they should adopt policies and identify employers (public, private or nonprofit) that can provide quality experiences for individuals to eventually obtain unsubsidized employment.

Additionally, these policies should include plans on the amount reimbursements would be for the jobs, what supportive services should be included, and any limits on the duration of the transitional job.

At this time, WorkLink is not funding Transitional Job opportunities.

Grandfather Clause – All OJT employers and WIOA participants served between July 1, 2015 to the effective date of this policy will be grandfathered in for WIOA services.

ACTION: All applicable WorkLink Workforce Development Area service providers, sub-recipients, contractors and other applicable organizational elements will implement and comply with these instructions, as well as any related instructions contained in applicable contractual agreements.

INQUIRIES: Direct all inquiries on this Instruction Letter to WorkLink Workforce Development Board Staff, Jennifer Kelly, WorkLink, 1376 Tiger Blvd, Suite 102, Clemson, SC 29631, telephone 864.646.5898, or email jkelly@worklinkweb.com.



Trent Acker, Executive Director
WorkLink Workforce Development Board

DISTRIBUTION: All WIOA Staff

**State of South Carolina
Incumbent Worker Training
Under the Workforce Innovation and Opportunity Act
Policy Framework**

This Policy framework applies to State Reserve funded Incumbent Worker Training (IWT) Programs. Since the Local Workforce Development Areas (LWDAs) are given the option (per Section 134 (d)(4) of the WIOA) to fund Incumbent Worker Training (IWT) programs, each will develop its own procedures for locally funded programs which must be designed to meet WIOA requirements at Section 134 (d)(4) regarding local board requirements and employer match.

Purpose

To provide training resources for businesses:

- to train currently employed workers in an effort to keep businesses and workers competitive;
- for training needed in current businesses due to expansion, new technology, retooling, new services/product lines or new organizational structuring or as part of a layoff aversion strategy;
- for which the employer provides a matching contribution of no more than 25% of the cost of the training.

Incumbent Worker Training may also fund training in new businesses, if those jobs are ineligible for assistance through ReadySC. However, there will be a waiting period of 120 days for new or expanding businesses that displaced workers elsewhere in the United States.

Eligibility for Incumbent Worker Training Funds

Businesses that:

- have at least one-full time employee; and
- are current on all state tax obligations.

A consortium may serve as a broker for Incumbent Worker Training and may enter into an agreement on behalf of participating businesses. Consortia may include business associations, industry councils, chambers of commerce, downtown development corporations, etc., or two or more businesses in need of similar training. The required matching contribution will be based on the total consortium employment and will be prorated among the participating businesses based on the number of employees trained.

Training entities, city, county and state governments are ineligible to receive Incumbent Worker Training Funds.

Funding Priority

- Businesses/Consortia whose training applications indicate a significant upgrade in employee skills and/or employee wage increases as a result of training
- Businesses/Consortia whose training applications reflect a significant layoff avoidance strategy and retention opportunities

- Businesses/Consortia whose training plans emphasize occupational skills training
- Businesses/Consortia/Business sites who have not received an IWT agreement during the prior or current program year
- *Local WDB priorities*

Trainee Eligibility

- Any individual employed by the eligible business

Trainee Data Collection

- Information about employees participating in this federally-funded training will be collected in a data base used to measure the impact of the training.
- Only aggregate data will be used.

Reimbursable Training Expenses

- Instructor/trainer salaries
- Textbooks/manuals
- Consumable materials/supplies

Non-Reimbursable Costs

- Trainee/employee wages or travel
- Trainee wages
- Travel/food/lodging
- Training Equipment
- Capital improvements
- Curriculum Development
- Purchase of any item or service that may be used outside of the training project (to include computer equipment hardware and non-training related software)
- Costs incurred prior to the approval date of the application
- Administrative costs incurred by consortia

Training Services

The types of training which may be funded through Incumbent Worker Training include, but are not limited to:

- Industry or company specific skills
- Technical and computer skills
- Basic skills enhancement
- Soft skills such as leadership, teamwork, customer service and management skills
- WorkKeys profiling/testing in conjunction with training linked to positions profiled/tested

OSHA, periodic safety, and/or refresher courses cannot be funded.

Training may be provided through:

- Technical colleges
- School Districts

- Area vocational-technical centers
- State colleges and universities
- Licensed and certified private entities/institutions
- Industry specific consulting/training organizations
- Professional associations and credentialing entities
- The business itself, through in-house training provider
- Registered Apprenticeship programs

Training may be conducted at:

- The training provider's facility
- The business's own facility
- A combination of sites

Application and Approval Process

- The Incumbent Worker Training Application is completed and submitted to the local workforce investment board.
- Upon approval of an application, an agreement is written between the business/consortium and the local workforce investment board.

Business/Consortium Requirements

- Businesses/consortium must provide a matching contribution to the training project that shall not be less than:
 - 10% of the costs for businesses with 49 or fewer employees;
 - 15% of the costs for businesses with 50 to 249 employees;
 - 25% of the costs for businesses with 250 or more employees.
- Business/consortium must sign an agreement to complete the training project as proposed
- Business/consortium must keep accurate records of the project's implementation process
- Business/consortium must submit reimbursement requests with required documentation

Project Completion

- Training projects are performance based with specific measurable outcomes, including the completion of the training
- Business/consortium will provide sufficient documentation for identification of all employee trainees for calculation of performance measures and outcomes deemed pertinent to the local workforce system
- Last payment will be withheld until final report is submitted and all performance criteria specified in the agreement have been achieved to include:
 - (1) Submission of required documentation
 - (2) Documentation of business matching contribution

The first name in second chances.SM



**Workforce
Development**

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P (864) 633-6354 | F (888) 696-8404
Eckerd.org



Subject: **Youth WIOA Supportive Service Policy**
Youth WIOA Incentive Policy

Issuance Date: 8-1-16 (Supersedes January 11, 2016 Policy Issuance)

Policy Background:

In accordance with the Workforce Innovation and Opportunity Act (WIOA), Palmetto Youth Connections will provide supportive services to WIOA eligible customers to enable their entry and retention in the workforce.

Purpose:

The purposes of this policy is to establish guidelines for the provision of supportive services in the form of transportation to WIOA eligible customers as per the Individual Employment/Service Plan.

Policy Updates effective: **8-1-16**

- **Transportation:**

WIOA transportation funded supportive services will be provided to WIOA eligible youth in accordance with the following policy and based on the **customer's plan**.

Transportation Limits per training activity: up to \$1000 to be reimbursed as follows:

Under 75 Miles: \$20 per week
75-150 Miles: \$40 per week
151-224 Miles: \$60 per week
225 miles or more: \$80 per week

Participants must adhere to Educational and Occupational Training Programs attendance policy which is a 75% attendance rate to receive transportation reimbursement assistance. Participants must notify their Career Coach immediately of emergencies that prevent class attendance.

For **Work Experience**, the limit for transportation assistance is the first two **(2) weeks** of training. After the first two (2) weeks of training, the participant must practice financial literacy and plan for transportation expenses.

Legal Aid Services:

Per WIOA regulations guidance issued 7-29-16 by South Carolina Department of Employment and Workforce, local areas can begin to provide assistance with the costs associated with expungements. Participants must provide documentation for costs and guidelines associated with an expungement request **and** be actively participating in the WIOA training program when the request is submitted. WorkLink will review and provide final approval for all Expungement requests.

Customer Incentives:

Customers are eligible for incentives, upon completion of goals, and will be awarded as outlined in the PYC PY 16 Skill Invoice Criteria Form.

Customers **must be actively participating in the WIOA program** and provide the appropriate documentation to their Career Coach to receive incentives as outlined in the PY 16 Skill Invoice Form.

**PY16 Skill Invoice Criteria
 (Incentives)**

MEASURE	AMOUNT
Common Measure: Program Skills Gain	
Program Skills Gain in Reading and/or Math	\$ 50.00
Note: A Student can receive \$50 per EFL Gain in Reading and/or Math until they are no longer BSD.	
Non-Common Measure: Pre-Employment Work Maturity Skills Orientation: Must Complete ALL 5 Classes and Work Experience to earn the full incentive. (Mid-point after 8 weeks or 256 of Work Experience training with evaluation of 2.0 or higher=\$50 AND final Work Experience evaluation of 3.0 or higher =\$50)	\$100.00
Complete Resume Workshop & Resume	
Complete NIOSH or OSHA Safety Course	
Complete Financial Literacy Workshop	
Complete Employability Workshop or Class	
Complete Entrepreneurial Workshop	
Non-Common Measure: WorkKeys Certification (Only eligible to earn one)	
Bronze WorkKeys Certificate	\$ 25.00
Silver WorkKeys Certificate	\$ 50.00
Gold or Platinum WorkKeys Certificate	\$ 75.00
Common Measure: Credential Attainment (Secondary Education or Occupational)	
Obtain GED or High School Diploma during the active phase of the WIOA program (May be earned in \$25 increments if the GED is taken in sections)	\$ 100.00
Obtain a Nationally Recognized Occupational Skills Credential during the active phase of the WIOA program	\$ 100.00
Common Measure: Placement (Post-Secondary and Employment) Enter post-secondary (verified by Student Clearing House), employment, or the military during the active phase of the WIOA Program.	\$100.00
Enter and retain enrollment in a Degree Program in Post-Secondary during the active phase of the WIOA program to obtain two or four year degree. Full Time students must take 12 hours or more with verification of Clearing House documentation prior to computer and/or accessories eligibility. Part-time students must take 6 hours and be employed a minimum of 15-20 hours per week. To qualify, part-time students will require employment verification, from first semester to the present. 2nd semester Clearing House verification documented prior to computer and/ or accessories eligibility. In addition, satisfactory progress, must be documented for the full or part-time credit hours earned for a cumulative GPA of 2.0 or higher.	Computer and/ or accessories not to exceed \$650



WorkLink

WIA INSTRUCTION LETTER NO.: 10-07

SUBJECT: WIA Participant Lifetime Training Account (ITA) Cap

ISSUANCE

DATE: April 20, 2011

EFFECTIVE

DATE: May 1, 2011

EXPIRATION

DATE: Indefinite

PURPOSE: This guidance provides additional detail on implementation of the Workforce Investment Act (WIA) participant lifetime ITA cap imposed by the State Workforce Investment Board (SWIB).

BACKGROUND: In response to the South Carolina Legislative Audit Council review of the WIA program, the SWIB established a lifetime maximum training cap to ensure consistent and effective use of WIA training dollars throughout the state.

POLICY: A lifetime on ITAs for classroom training is set at a maximum of \$14,000 per WIA participant. Each LWIA should continue to enforce its own locally approved ITA cap, if stricter than the state-imposed ITA cap. (Please see your Statement of Work for WorkLink's stricter training cap policy.)

ITAs include tuition, books, tools, uniforms, fees and supplies required for the completion of training. Training costs are paid with ITA vouchers. Supportive services are not included in the training. Any portion of the total training that is paid with other than WIA funds (i.e. PELL, Lottery, TAA, etc.), will not count toward the training cap.

Additional Policy Considerations:

- GED and/or basic skills training is included in the lifetime ITA cap. Therefore, using the most expeditious and cost efficient means of acquiring these prerequisites is imperative.
- Allowing participants to attend training on a part-time basis increases the cost of training and the time it takes to complete training. Therefore, full-time training should be the norm.


ACTION: Any and all exceptions made by the LWIA must be documented on the attached form and submitted to the SC Department of Employment and Workforce (DEW). Internal Audit and Quality Assurance staff before or during the annual financial audit visit. All exceptions will be reviewed by the SWIB One-Stop Management Committee.

The LWIA must utilize a system to document all training costs for each WIA participant. The Virtual OneStop (VOS) Individual Fund Tracking (IFT) module is available and recommended for this purpose. If a local area chooses to use a separate tracking system, the DEW staff must have access to the records.

This policy is in effect for all WIA participants that begin training on or after May 1, 2011.

Please copy and distribute this information appropriately with your agency.

INQUIRIES: Direct all inquiries on this Instruction Letter to the WorkLink Workforce Investment Board Staff, WorkLink, 511 Westinghouse Road, Pendleton, SC 29670, telephone 864.646.1826, fax 864.646.2814, or e-mail wgraham@worklinkweb.com.



Amy Jessee, Interim Director
WorkLink Workforce Investment Board

DISTRIBUTION: All WIA Staff

ATTACHMENT: State WIA Instruction Number: 10-02 WIA Participant Lifetime Individual Training Account (ITA) Cap

PO Box 995
1550 Gadsden Street
Columbia, SC 29202
www.dew.sc.gov



Nikki R. Haley
Governor

John L. Finan
Executive Director

STATE WIA INSTRUCTION NUMBER: 10-02

TO: All Local Workforce Investment Areas (LWIA)

SUBJECT: WIA Participant Lifetime Individual Training Account (ITA) Cap

ISSUANCE DATE: April 20, 2011

EFFECTIVE DATE: May 1, 2011

PURPOSE: This guidance provides additional detail on implementation of the Workforce Investment Act (WIA) participant lifetime ITA cap imposed by the State Workforce Investment Board (SWIB).

BACKGROUND: In response to the South Carolina Legislative Audit Council review of the WIA program, the SWIB established a lifetime maximum training cap to ensure consistent and effective use of WIA training dollars throughout the state.

POLICY: A lifetime limit on ITAs for classroom training is set at a maximum of \$14,000 per WIA participant. Each LWIA should continue to enforce its own locally approved ITA cap, if stricter than the state-imposed ITA cap.

ITAs include tuition, books, tools, uniforms, fees and supplies required for the completion of training. Training costs are paid with ITA vouchers. Supportive services are not included in the training. Any portion of the total training that is paid with resources other than WIA funds (i.e. PELL, Lottery, TAA, etc.), will not count toward the training cap.

Additional Policy Considerations:

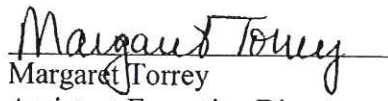
- GED and/or basic skills training is included in the lifetime ITA cap. Therefore, using the most expeditious and cost efficient means of acquiring these prerequisites is imperative.
- Allowing participants to attend training on a part-time basis increases the cost of training and the time it takes to complete training. Therefore, full-time training should be the norm.

ACTION: Any and all exceptions made by the LWIA must be documented on the attached form and submitted to the SC Department of Employment and Workforce (DEW) Internal Audit and Quality Assurance staff before or during the annual financial audit visit. All exceptions will be reviewed by the SWIB One-Stop Management Committee.

The LWIA must utilize a system to document all training costs for each WIA participant. The Virtual OneStop (VOS) Individual Fund Tracking (IFT) module is available and recommended for this purpose. If a local area chooses to use a separate tracking system, the DEW staff must have access to the records.

This policy is in effect for all WIA participants that begin training on or after May 1, 2011.

INQUIRY: Questions may be directed to Mary jo Schmick at (803) 737-2708 or mschmick@dew.sc.gov.


Margaret Torrey
Assistant Executive Director
Employment and Training

Attachment

SOUTH CAROLINA DEPARTMENT OF EMPLOYMENT AND WORKFORCE

WIA Participant Lifetime Individual Training Account (ITA) Cap Justification Report

Section 1: LWIA Information

GRANTEE NAME:
LWIA:
CONTACT PERSON:
REPORTING PERIOD END DATE:
LOCAL TRAINING CAP: \$

Section 2: Participant Information

Complete the contact information for participant and training amount.

PARTICIPANT NAME / STATE ID#:	BEGINNING TRAINING DATE:	END TRAINING DATE	TRAINING TITLE	TRAINING PROVIDER	AMOUNT OF TOTAL TRAINING	STUDENT CURRENT STATUS: FULLTIME OR PARTIME	INDICATE REASON FOR EXCEEDING THE LIFETIME ITA CAP: (BE SPECIFIC & IF NEEDED ATTACH ADDITIONAL DOCUMENTATION)
					\$		
					\$		
					\$		

Section 3: Signatures

SIGNATURE:

TYPE/PRINT NAME:

DATE:

Individual Training Account Cap

April 2011



Self-Sufficiency Definition

WorkLink's self-sufficiency guidelines are 150% of Lower Living Standard Income Level for Adults and 85% of dislocated wage for Dislocated Workers. Youth must meet low income definition.

Training Cap

WorkLink's training cap is \$10,000 lifetime and \$5,000 per program year. Our supportive service cap is \$3,000 per program year.

Locally Defined Youth Barriers

WorkLink Youth Local Barrier is defined as:

An individual who requires additional assistance to complete an education as determined by local area: (1) Does the applicant's physical, mental, emotional, or learning disability result in a substantial barrier to employment or to education? (2) Does applicant lack reliable transportation, defined as not having a valid driver's license or access to an automobile? (3) Is the applicant (youth 17-24) in need of work-readiness skills to include soft skills, life skills, occupational skills, and lack of work experience?

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 9th 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.