

**WORKFORCE INVESTMENT BOARD
Executive Committee
May 28, 2014 at 2:00 PM
Pendleton Library, Meeting Room – Pendleton, SC
AGENDA**

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| I. Call to Order | Danny Brothers, Chair |
| II. Approval of Minutes (05/08/14)* | Danny Brothers |
| III. DEW Proposal Update & Discussion | Round Table |
| IV. PY'13 Budget | Brandi Runion |
| a) Henkels & McCoy PY'13 Grant Expenditure Review | |
| b) Henkels & McCoy PY'13 Grant Modification Request #4* | |
| V. PY'14 Budget | Brandi Runion |
| a) PY'14 Allocations from SCDEW | |
| b) PY'14 WorkLink In-House Budget Transfer Request (Transfer of 50% of Program DW Funds to Program Adult Funds)* | |
| c) PY'14 WorkLink In-House Budget Proposal* | |
| d) Henkels & McCoy PY'14 Adult/DW Grant* | |
| e) Henkels & McCoy PY'14 Youth Grant* | |
| VI. WorkLink Office Water Damage Update | Jennifer Kelly |
| VII. Executive Director Search Update | Jennifer Kelly |
| VIII. Other Business | Danny Brothers |

***Action Required**

*Vision – To have a fully-employed, skilled workforce in Anderson, Oconee, and Pickens counties, SC
Mission – We develop the link between employers and the workforce in Anderson, Oconee, and Pickens counties, SC*

Upcoming Meetings:
Worklink Workforce Investment Board Meetings
June 11, 2014 at 1:00pm
Martin Inn & Conference Center
Lunch Immediately Precedes the Board Meeting

**WORKFORCE INVESTMENT BOARD
EXECUTIVE COMMITTEE MEETING**

May 08, 2014 – 9:00am

Comprehensive Center Large Conference Room – Clemson, SC

Members Present:

Danny Brothers	Trent Acker	Burriss Nelson
Stan Brooks via conference call		

Members Absent:

Ronnie Booth	Richard Blackwell	Robert Halfacre
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Staff Present:

Jennifer Kelly	Brandi Runion	Patty Manley
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Guests:

Steve Pelissier	Matt Fields
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I. Call to Order

Chair Danny Brothers called the meeting to order announcing a quorum was present to conduct business of the committee and the meeting was being recorded.

II. Approval of Minutes (01/09/14 & 04/10/14)*

The minutes from the January 9, 2014 & April 10, 2014 meetings were included in the meeting packet. Chair Brothers called for any corrections or amendments to the minutes.

ACTION TAKEN: A motion was made by Trent Acker to approve the January 9, 2014 meeting minutes as submitted, second by Burriss Nelson. The motion carried unanimously.

ACTION TAKEN: A motion was made by Trent Acker to approve the April 10, 2014 meeting minutes as submitted, second by Danny Brothers. Burriss Nelson abstained from the vote. The motion carried with a majority vote.

III. DEW Proposal Discussion

Jennifer Kelly referred to pages 6-33 of the meeting packet and provided a synopsis of the email communication outlining the proposal from DEW with WorkLink staff suggestions; the actual WorkLink Proposal received from SC DEW with our numbers regarding Center traffic added to the right side of pages 10 & 11. Ms. Kelly explained these numbers correlate with the number of people we serve in each of our Centers not

just the number of DEW program services provided. On page 12, Ms. Kelly voiced concerns regarding the Intake Coordinator position as proposed by DEW as well as DEW's proposed schedule for days and hours core services will be provided at the satellite centers. Ms. Kelly stated the verbiage in the Resource Sharing Agreement as proposed by DEW on pages 13-25, is acceptable and reported that Brandi Runion will have the numbers ready for the budget. Ms. Kelly referred to pages 26-33, the SC Works Center's numbers regarding traffic as provided by our Center manager, Henkels & McCoy;

Ms. Kelly referred to page 34 stating the financial analysis provided by Ms. Runion details how we currently operate and compares the effects if we agree with DEW's proposal. The Intake Coordinator position will affect budget negotiation with Henkels & McCoy but will not affect participants getting to the person they need to see. Ms. Runion clarified that it will affect our budget by \$26,000 &/or will save us \$1,500 - \$2,000 for just one person. At this point we have volunteers from AARP, however if the position is filled by DEW that person would become a OneStop Referral person.

Ms. Kelly requested assistance from the Executive Committee for what WorkLink's action plan is to be if these proposed changes are affected, especially regarding the proposed changes in the scheduled days of services at the satellite centers, and more specifically what would we consider a minimal level of service for us to move forward in negotiating with DEW.

Ms. Runion stated she had spoken with Scott Ferguson from DEW regarding the financial ramification and learned the DEW is attempting to set up all SC Works Centers across the state so they operate identical to one another.

Members discussed at length a concern that participant numbers are not being counted accurately across our service region. An explanation was offered that DEW helped create this problem by closing the OneStop Centers when they pulled UI services out. Members also addressed a question regarding the possible lack of advertising by both us and DEW regarding new locations. Following discussions, Chair Brothers gave permission for staff to move ahead with relocating the signs from the former location to the new Center locations and looking into the budget for ways to increase the budget for advertising and outreach.

Mr. Pelissier informed Committee members that Cheryl Stanton has stated resources are being used where they are most needed, adding that unfortunately DEW in Columbia has a miss-perception of reality in our region. DEW is basing their decision to change the schedules at our satellite centers based on skewed numbers. There are services being provided at other locations that are not being counted in the Center traffic numbers. Ms. Kelly checked into obtaining a waiver for Henkels and McCoy to provide WP services in the Centers without DEW staff and has learned that other states have been unsuccessful in their attempts.

Committee members recommended moving forward in communications with DEW following the WorkLink staff recommendations adding there are too many barriers currently placed on the participants for DEW to cut back on schedules at satellite

centers. Members present also agreed they will not support anything less than keeping the Anderson Center staffed full time.

Discussion was held regarding setting up a meeting with Cheryl Stanton in Columbia to address our questions and concerns regarding the changes being proposed in the RSA. Mr. Pelissier stated he, Ms. Kelly and Matt Fields will be in Columbia for a different meeting on Wednesday, May 13 in Columbia and suggested he reach out to Ms. Stanton to schedule the meeting with her to address our concerns adding that he will set the parameters for the meeting.

Plan of Action:

Chair Brothers will communicate with Ms. Stanton to schedule a meeting. Ms. Kelly will get appropriate numbers together will work with Windy Graham to attempt to pull the necessary data a different way. Chair Brothers recommends Mr. Pelissier, Ms. Kelly & Mr. Fields move forward with presenting staff recommendation in meeting with Ms. Stanton stressing traffic will not justify moving DEW staff to Clemson, request assistance from Ms. Stanton's office in helping the Board understand the financial justifications from DEW to make these changes, and see if there is room to push back on the Intake person position.

ACTION TAKEN: A motion from the Workforce Skills & Education Committee to approve the Operations Plan as presented and submitted, second by Trent Acker. Motion carried with a unanimous vote.

IV. Executive Director Job Description & Posting

Chair Brothers referred to page 36 of the meeting packet stating the Executive Director Position description was revised by Board member Stephanie Collins in 2011. Mr. Brothers stated Ronnie Booth had suggested deleting the special requirement that the Executive Director reside in our service region and asked if other Committee members had suggestions or recommendations as well.

ACTION TAKEN: Burriss Nelson made a motion to accept Ronnie Booth's recommendation regarding residence in the Executive Director Job description and job positing, second by Danny Brothers. Motion carried with a unanimous vote.

Ms. Runion reported on the various avenues for advertising the posting.

Mr. Pelissier reported Susan Crocker recommends the Board discuss what the need is from an Executive Director to ensure Board members are fully aware of what they are looking for prior to posting the position. Mr. Pelissier recommended having the job description reviewed. Committee members discussed and agreed to reach out to Susan Crocker requesting she review and make suggestions for improvement.

ACTION TAKEN: Burriss Nelson made a motion to request Susan Crocker review the Executive Director Job description and make suggestions for improvement, second by Trent Acker. Motion carried with a unanimous vote.

Chair Brothers informed Committee members that Robert Halfacre, Stephanie Collins, and Stan Brooks have been assigned to the Executive Director Search Committee.

V. Other Business

A. Strategic Plan

Ms. Kelly provided an update on the Strategic Plan and asked if the committee wanted to finalize the last plan and move forward with next 5 years stating Ms. Runion has allocated \$45,000 in budget based on the cost of the last plan. Ms. Kelly requested that any recommended changes be submitted by May 15, 2014 and asked if the Executive Committee wished to score the plan. Following discussion, Mr. Brothers recommended WorkLink staff score the plan and report back to the Executive Committee. Ms. Kelly stated that should be finalized by late July 2014.

B. Budget Negotiations Update

Ms. Runion reported that allocations have been received – overall a 5% reduction from previous year. The Youth Council has finalized the PYC budget so that budget and the draft Adult/DW budget will be presented to the Finance Committee on May 19, 2014 then to the Executive Committee on May 28, 2014. Ms. Runion clarified that the Adult/DW budget is still in negotiations stage and the Workforce Skills & Education Committee Budget Negotiations Team will be meeting prior to above mentioned meetings to finalize that budget.

VI. Adjournment

Motion to adjourn made by Trent Acker, second by Burriss Nelson. Meeting adjourned.

Respectfully submitted by: Patty Manley, Office Manager

Jennifer Kelly

From: Brandi Runion
Sent: Thursday, May 22, 2014 4:25 PM
To: Ronnie Booth (rlbooth@tctc.edu); Burriss Nelson (bnelson@andersoncountysc.org); Trent Acker; rblackwell@oconeesc.com; Stan Brooks; Halfacre, Robert (RHalfacre@bbandt.com) (RHalfacre@bbandt.com)
Cc: Danny.Brothers@duke-energy.com; Steve Pelissier; Jennifer Kelly
Subject: RE: Follow-Up from Meeting with SC DEW regarding the WorkLink proposal
Attachments: Analysis of TCTC Centers.xlsx

Good afternoon,

After much number crunching, this is to the best of my knowledge an analysis of what the cost implications would be if DEW pulled out of the Satellite Centers after 3 months & 6 months if the costs with TCTC remain the same in PY'14 as they are currently in PY'13.

Scenario 1 – If we owe TCTC for the entire 12 month period and absorb DEW costs when they move out (This includes 5 WIA staff remaining at Satellites the entire year)

- 1) If after 3 months, the 6 DEW staff located in the satellite centers moved out & into the Clemson Center and we absorb the remaining 9 months owed to TCTC then we would only increase our total costs by \$1,568.91. This is because we would save money with the 6 staff moving into Clemson.
- 2) If after 6 months, the 6 DEW staff located in the satellite centers moved out & into the Clemson Center and we absorb the remaining 6 months owed to TCTC then we would only increase our total costs by \$1,045.94. This is because we would save money with the 6 staff moving into Clemson.

Scenario 2 – If we only owe TCTC for the 12 month period for WIA staff and we had a clause in the TCTC MOA that would allow us an out for the DEW offices becoming vacant, but keeping the Resource Room (This includes 5 WIA staff remaining at Satellites the entire year as well as keeping the Resource Room)

- 1) If after 3 months, the 6 DEW staff located in the satellite centers moved out & into the Clemson Center and we did not owe the remaining 9 months to TCTC (if our MOA stated this) but we kept the Resource Room for the entire year, then we would save \$8,781.09 that we would have been on the hook for since DEW moved out.
- 2) If after 6 months, the 6 DEW staff located in the satellite centers moved out & into the Clemson Center and we did not owe the remaining 6 months to TCTC (if our MOA stated this) but we kept the Resource Room for the entire year, then we would save \$5,854.06 that we would have been on the hook for since DEW moved out.

Thanks,

Brandi C. Runion

Finance Director

WorkLink Workforce Investment Corporation

SC WORKS | BRINGING EMPLOYERS
AND JOB SEEKERS TOGETHER
WORKLINK
ANDERSON·OCONEE·PICKENS

SC Works Clemson Comprehensive Center at East Park

1376 Tiger Blvd, Suite 102

Clemson, SC 29631

P: 864-646-1827 Relay Service Dial 711 (TTY)

F: 864-646-2814

brunion@worklinkweb.com

worklink.scworks.org



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From: Jennifer Kelly

Sent: Thursday, May 22, 2014 12:59 PM

To: Ronnie Booth (rbooth@tctc.edu); Burriss Nelson (bnelson@andersoncountysc.org); Trent Acker; rblackwell@oconeesc.com; Stan Brooks; Halfacre, Robert (RHalfacre@bbandt.com) (RHalfacre@bbandt.com)

Cc: Danny.Brothers@duke-energy.com; Steve Pelissier; Brandi Runion

Subject: FW: Follow-Up from Meeting with SC DEW regarding the WorkLink proposal

Good afternoon all,

I wanted to make sure everyone had the latest information on the DEW proposal.

SC DEW did not send a formal response on Tuesday as I was expecting so we reached out to them yesterday for follow-up purposes. Once they received our inquiry, Cheryl Stanton called Steve Pelissier directly to confirm the plans that we had discussed at the meeting last week. Steve stated to me on the phone that they would like to keep the staffing levels the same for the next 3 to 6 months, and re-evaluate at that time. They would like also to proceed with the UI pilot proposal, and would like someone from the WorkLink team to be assigned to the UI pilot program to finish putting together the details. I have attached Steve Pelissier's email for your review as well as Brandi's financial analysis of what would happen if we have a 12 month lease with TCTC and DEW pulls the staffing at 3 months and 6 months. (All financial costs are based on this year. We will be setting up a MOA discussion with TCTC to finalize costs and lease terms in the immediate future.)

Brandi is also working on additional information for if those 6 DEW staff were to move to the Clemson SC Works Center and we have the above scenario, what would the net cost be for each party. We will send that updated spreadsheet to you shortly.

Please let me know what questions we can answer or find out for you. I have added this to the Executive Committee agenda.

Thanks,

Jennifer M Kelly

Interim Executive Director

Jennifer Kelly

From: Steve Pelissier <pelissier@scacog.org>
Sent: Wednesday, May 21, 2014 4:33 PM
To: Jennifer Kelly
Cc: Danny.Brothers@duke-energy.com
Subject: Phone Conversation with Cheryl Stanton re/ Using WorkLink as a Pilot Project for Linking UI and WIA

Jennifer:

I had a phone conversation with Cheryl Stanton earlier today to discuss the possibility of using WorkLink as a pilot project to strengthen linkages between UI and WIA.

As we discussed when we met with Cheryl and her staff last week, DEW has recognized the drop in WIA client numbers resulting from switching UI to the call centers. They have been discussing strategies to re-establish some type of linkage between these services and have identified WorkLink as a good candidate to develop a pilot project for this.

The initiative is not fully thought out at this time, partly because they want WorkLink to confirm that it wants to be the partner, and partly because they realize that WorkLink would be a key player in developing the program.

A key advantage for WorkLink to enter into this partnership is that DEW would keep staffing levels constant at the satellite centers for a period of six months. (Actually, as I look at my notes, I'm not sure if centers refers to just Anderson and Seneca or all of them, though it is clear that staffing levels would be held constant at those two locations.)

The basic structure DEW is proposing is that UI counselors would be trained to identify good clients for re-employment services (no felonies, no major challenges, etc.). At the time those clients sign up for UI benefits, they would also be scheduled for an appointment with the team. (It is not decided at this time who would be on the team, but it would be some combination of DEW, WorkLink, and Hinkles employees.) The client would receive intensive services, part of which would be a profile that is very similar to Wagner Peyser (and would eventually be fed into Wagner Peyser). Subsequently, there would be additional follow-up.

If we accept, DEW would organize a planning meeting with our staff, the headquarters staff, and their regional staff.

A key component is holding staffing levels constant for six months.

I told Cheryl that I strongly believe that WorkLink is interested and that I would follow-up with her soon with our official decision.

I am not sure whether the written agreement for the project would come before or after the initial planning meeting in Columbia, though probably after, so that details can be worked out.

Please let me know if you have any questions or concerns.

Thanks,
Steve

Steven Pelissier

WorkLink Workforce Investment Board
SC Works Clemson Comprehensive Center at East Park
1376 Tiger Blvd, Suite 102
Clemson, SC 29631
P: 864-646-5898 Relay Service Dial 711 (TTY)
F: 864-646-2814
Email: jkelly@worklinkweb.com
Website: worklink.scworks.org

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From: Brothers, Danny [<mailto:Danny.Brothers@duke-energy.com>]
Sent: Saturday, May 17, 2014 6:37 AM
To: 'pelissier@scacog.org'; 'jkelly@worklinkweb.com'; 'tacker@alliancepickens.com'; 'rblackwell@oconeesc.com'; 'bnelson@andersoncountysc.org'; 'rbooth@tctc.edu'; 'sbrooks@alicemfgco.com'; 'rhalfacre@BBandT.com'
Subject: Re: Follow-Up from Meeting with SC DEW regarding the WorkLink proposal

Jennifer and Steve, thanks for meeting with DEW and expressing the concerns on behalf of the Exec. Comm.

Let's discuss further as a group when we get the revised proposal, but here are a few thoughts on the other outcomes:

Pushing the UI to the SC Works Centers seems contrary to the initial On-Line service model they instituted last July, but glad to see they are seeing the need that some have for in person services. I would assume this is part of the DOL solution for getting folks to the right services in a timely manner. ??? - When did they receive the DOL write up for this? May change their plans on removing folks from SC Works Centers all together.

Three months is a bit short for us to see the fruits of outreach but I understand they are wanting to see a difference quickly or move with proposed staffing. I suggest we ask for 6 months, and immediately form that ad hoc team as soon as possible to begin work on this as Jennifer has suggested. Suggestions on who should be on it. I would like to recommend we have someone from Youth or H and M that has done some of their outreach earlier this year to gain from their committee's best practices.

Thoughts???

Thanks,

Danny Brothers | Account Executive

Duke Energy

Sent by BB Device

From: Steve Pelissier [<mailto:pelissier@scacog.org>]
Sent: Thursday, May 15, 2014 09:54 PM
To: Jennifer Kelly <jkelly@worklinkweb.com>; Brothers, Danny
Cc: David Fields (dfields@henkels.com) <dfields@henkels.com>
Subject: RE: Follow-Up from Meeting with SC DEW regarding the WorkLink proposal

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All:

Just to add a little to Jennifer's notes. From the discussion, it is apparent that DEW was cited in a DOL monitoring report that they do not do well at directing people (most importantly veterans) to the right resources in a timely manner. The intake coordinator position was their proposed strategy in response to the finding. Presumably, DOL accepted that mitigation strategy, so now DEW is committed to it. They really have no flexibility.

Steve

From: Jennifer Kelly [<mailto:jkelly@worklinkweb.com>]
Sent: Thursday, May 15, 2014 11:04 AM
To: Danny.Brothers@duke-energy.com
Cc: David Fields (dfields@henkels.com); Steve Pelissier
Subject: Follow-Up from Meeting with SC DEW regarding the WorkLink proposal

Danny,

Steve Pelissier, Matt Fields and I met with SC DEW yesterday in Columbia. We laid out all of the concerns discussed in the Executive Committee meeting held last week, reiterating that the Committee did not want to budge on the hours of operation and would like additional consideration due to the following circumstances:

- The Board has been in discussion about focusing on an outreach plan for the SC Works Center for PY14
- Lack of space for staff to move to Clemson
- Lack of traffic to justify the staff move to Clemson
- Lack of time for tracking traffic (Anderson only opened in October)
- Timeline for moving the signs to the TCTC facility (along with TCTC's expressed concern of needing the signs based on the proposed schedule)

Conclusion on the discussion:

They stated to us that our structure does not necessarily fit their intended model. Therefore, they requested to be able to review the proposal based on our recommendations and concerns. During the conversation, they pitched the idea of piloting a program for the UI program to push current UI claimants to the SC Works Centers for in-person services. They have proposed to get us a new staffing plan and a draft pilot project proposal by Tuesday, May 20.

They also proposed, based on our conversation regarding the outreach plan, to leave the staffing schedule as is, but evaluate after three months to determine if traffic patterns have changed based on the execution of our outreach plan.

We also discussed the Center Manager position versus the Intake Coordinator position. They do not want to budge on this decision due to a DOL audit review. They offered up the option of allowing staff to assist with interviews.

[Side note: I would like to request that we have an SC Works Outreach ad hoc committee of the Board (that has expertise in outreach and marketing) to assist staff and the Operator in outreach efforts for the next year. What are your thoughts on this?]

Jennifer Kelly

From: Jennifer Kelly
Sent: Thursday, April 24, 2014 2:29 PM
To: 'Booth, Ronnie L.'; Stan Brooks; Halfacre, Robert (RHalfacre@bbandt.com) (RHalfacre@bbandt.com); 'trent acker'; 'Burriss Nelson'; 'Richard Blackwell'
Cc: Danny.Brothers@duke-energy.com; Brandi Runion
Subject: IMPORTANT - DEW Proposal - Changes to days of Operation in the Satellite Centers
Attachments: PY 14 - WorkLink.pdf; SC Works Center Customer Flow.xlsx; FW: COG Directors Meeting follow-up; Cost Analysis of WorkLink Report.xlsx

Good afternoon all,

I have information to share with you that Chairman Danny Brothers and I received earlier this week that may impact the services being delivered in our area.

SC DEW has been working on the Resource Sharing Agreements for the WorkLink region for PY'14. The attached proposal called "PY14 WorkLink" is a discussion starter for the negotiations with SC DEW. I have attached some information that Cheryl Stanton, Executive Director for DEW sent out to the COG Directors.

Of particular interest is:

- a) The proposed SC DEW staffing dates of each of the Centers starting July 1, 2014.

Region/Center	Proposed Days	Current Days
WorkLink:		
Anderson	Weekly: Tuesday	Monday – Friday
*Clemson	Weekly: Monday – Friday	Monday – Friday
Easley	Monthly: 1 st Wednesday	Monday – Friday
Honea Path	Monthly: 1 st Thursday	Tuesday
Seneca	Weekly: Wednesday & Thursday	Monday – Friday

Impacts if implemented as stated above:

1. **Number of staff available in the locations to provide services to the jobseekers in the three counties.** DEW staff would not be present on most days in the Centers; therefore, we would not be able to provide job matching services through DEW staff. *Please note that DEW staff will not be reduced according to this proposal.*

Coverage of Offices by Staff

	Anderson	Clemson	Easley	Honea Path	Seneca	Totals
AARP	1	4			2	7
Trade		2	1			3
UI		2				2
Veterans		2				2
Wagner-Peyser	2	6	1	1	1	11
WIA	1	6	2	1	2	12
WorkLink		7				7
Totals	4	29	4	2	5	44

The numbers highlighted in gray above are DEW staff that will move to Clemson (under this proposal) on days that they are not scheduled to be in the Satellites.

Options:

- a. Negotiate with SC DEW to revise the proposed dates of operation.
 - i. Attached is the SCWorks Center Traffic Report that we track on a monthly basis (this is inclusive of all customers regardless of service).
 - ii. Calculations reflected in the "WorkLink Report" proposal are based on DEW traffic only.
 - iii. Considerations on pursuing this option - what are the political ramifications and what is the necessary locations of the resources we are providing in the three counties?
- b. If we approve the decrease in service locations as proposed - WIA funded Career Coaches could either stay in the buildings (pending TCTC MOA negotiations) or move to Clemson and rotate on the days that DEW rotates. In the event that we keep the Career Coaches in the buildings on a full time basis, either Career Coaches would only see WIA participants on the days that DEW is not there or partners could provide job search services. Please note that WIA cannot fund Core level staff (resource room and job matching services) without a waiver from DOL – some of the other local areas are suggesting a waiver to allow this to happen. We currently have an agreement with AARP to assist with placing volunteers in the Resource Room.
Con: Services would be reduced and would rely on availability of voluntary partners.
- c. Relocate all staff back to the Comprehensive Center except on proposed dates of service. We could re-look at the SC Works On-the-Go model for services.
Cons: Services in the communities would be much harder for job seekers to access. Facility concerns - All on-site file storage would need to be moved back into storage units to give just enough room for all staff to have office space. Parking could potentially be an issue (approximately additional 10 vehicles).

2. TCTC Memorandum of Agreements to be in the QuickJobs Centers

Richard Blackwell is serving as the Board member liaison from WSEC for the MOA negotiations with TCTC. Depending on the agreement that we come to with DEW, this will impact the TCTC MOA agreements for facilities. Please note that we are currently in the process of scheduling a meeting with TCTC to discuss the MOA agreements for PY14.

3. Financial implications of the proposed scheduling:

Currently in the TCTC QuickJob Centers, we are paying \$600 per location (includes two offices) plus \$500 per month for classroom space. Except for \$300 per month for Honea Path. The total cost is \$31,200 per year cost shared with DEW at 50/50 split plus \$5,400 per year for long distance costs that is a 100% DEW cost.

- a. Under the proposed plan, we would possibly not need two offices. This would decrease our cost by 1 office space.
- b. Provided that TCTC keeps the same MOA costs for QuickJob Centers - please reference the attached Excel spreadsheet for Brandi's calculation of the new costs based on the proposed. It would be a mutual overall decrease to our costs.
- c. We would still need the classroom space for the resource room depending on the days that DEW staff could be there. The resource room costs would not be shared; it would be 100% funded by WIA.

b) Salary for new Intake Coordinator

- Pros: We would have a steady receptionist at the front desk trained and fully funded by DEW. This has been an ongoing request from Henkels and McCoy. We would not share in the Intake Coordinator's cost.
- Cons: Henkels and McCoy would absorb \$26,760 in their PY14 budget for the remainder of the Center Manager position's shared cost. His salary was split between DEW and WIA. They will no longer share in this cost. This position is currently filled by AARP work experience volunteers at no cost to our budget. Despite

what the "WorkLink Report" proposal says DEW will spend \$17,500 more out of their budget for the intake coordinator for PY14 versus what they would have spent for the Center Manager position.

- c) DEW has stated that we must have all RSAs signed by July 1 in order to avoid having our allocations withheld from us beginning July 2. However, we are trying to get all the financial impacts situated by May 31 prior to Brandi's planned leave.

Staff recommendation – We negotiate with DEW to keep service levels at full capacity (Monday-Friday, 8:30AM – 5:00PM) in Anderson and Seneca, and negotiate on Easley and Honea Path days of operation (please note that Honea Path is currently open only on Tuesdays; Easley is currently open Monday - Thursday).

Please provide feedback, questions, concerns, and other considerations. Thanks as always for your input and guidance!

Jennifer M Kelly

Interim Executive Director

WorkLink Workforce Investment Board
SC Works Clemson Comprehensive Center at East Park
1376 Tiger Blvd, Suite 102
Clemson, SC 29631
P: 864-646-5898 Relay Service Dial 711 (TTY)
F: 864-646-2814
Email: jkelly@worklinkweb.com
Website: worklink.scworks.org

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WorkLink

Program Year 2014

I. Staffing Level Changes

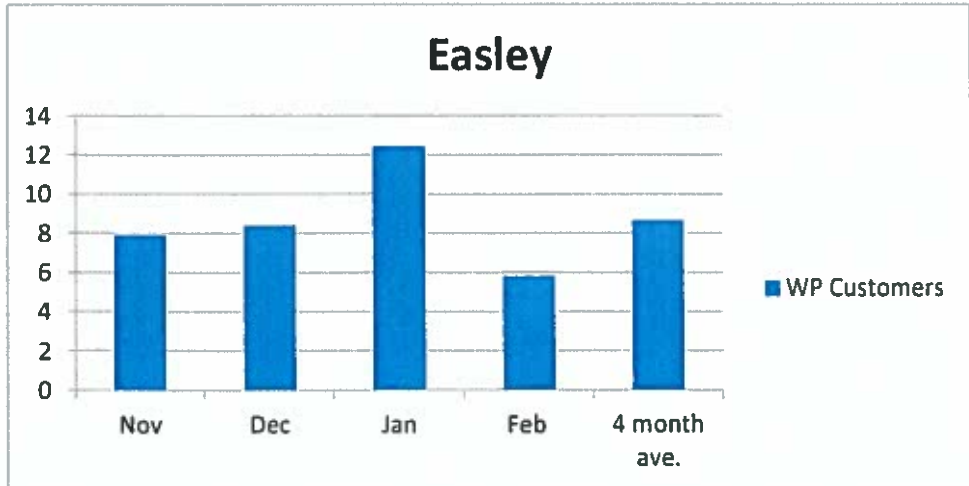
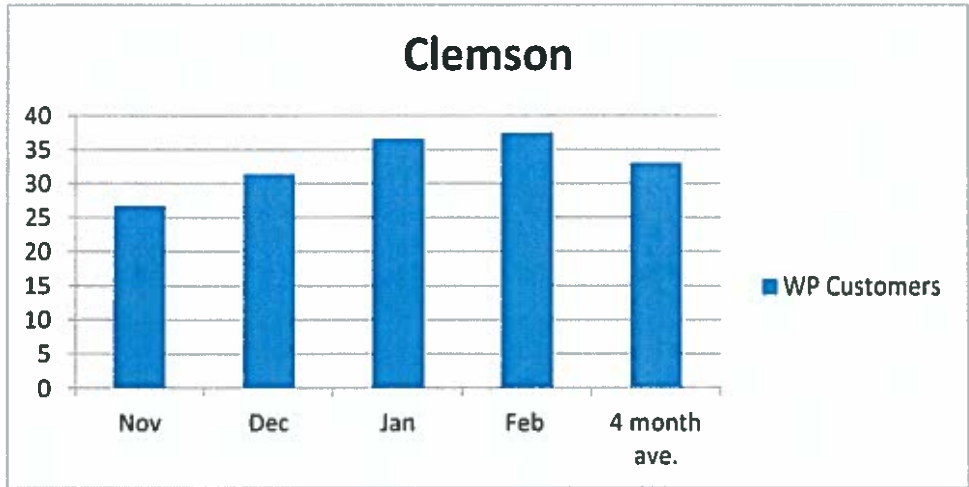
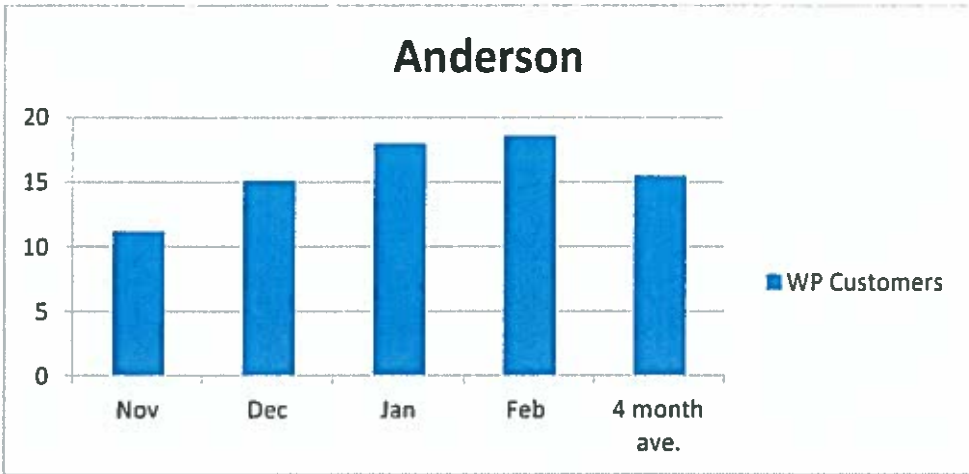
With less federal funding comes the need for DEW to ensure that all resources are leveraged to their maximum potential to provide the highest level of service to our customers: i.e. do more with less. As such, staffing levels and work schedules will be determined based solely on the documented customer need (i.e. customer traffic of each center). Based on this model, all comprehensive SC Works Centers will, at a minimum, maintain their full-time DEW staffing levels. However, some centers and/or counties may only have a DEW presence once a month or not at all. The group analyzed WP traffic reports with data from November 2013 through February 2014. If the four month weekly average was less than 40 individuals seeking WP services in that location, the recommendation was made to reduce the number of days DEW staff would provide services at that location. Staff whose days are reduced will spend all other days in the local area's comprehensive center. *DEW will not be reducing any WP staff or resources in any local area, only reallocating staff to meet customer demand.*

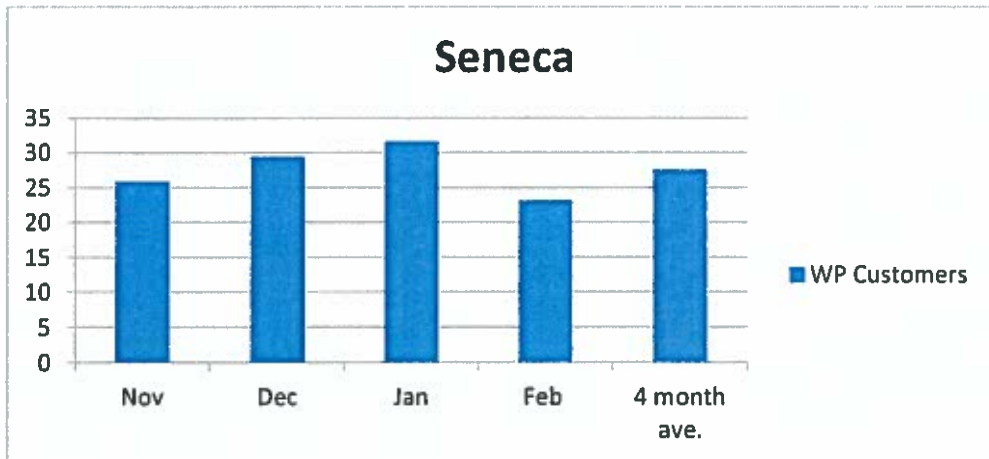
- ❖ The following table reflects the proposed WP Operational Schedule for WorkLink based solely on WP customer traffic counts:

Region/Center	Proposed Days	Current Days
WorkLink:		
Anderson	Weekly: Tuesday	Monday-Friday
*Clemson	Weekly: Monday - Friday	
Easley	Monthly: 1 st Wednesday	Monday-Friday
Honea Path	Monthly: 1 st Thursday	Tuesday
Seneca	Weekly: Wednesday & Thursday	Monday-Friday

*Comprehensive Center

- ❖ The following charts reflect WP customer traffic counts by location:





❖ The following table is a cost analysis for WorkLink on projected WP costs by location for PY '14:

Area	DEW Proportionate Share paid to LWIA PY13	Full-time Location?	DEW Projected Cost paid to LWIA PY14	LWIA Projected Increase in Cost PY14
Worklink				
Anderson	4,000.00	N		4,000.00
Clemson	117,553.76	Y	135,430.60	(17,876.84)
Easley	3,600.00	N	-	3,600.00
Honea Path	1,800.00	N	-	1,800.00
Seneca	3,600.00	N	-	3,600.00
Total	130,553.76		135,430.60	(4,876.84)

II. Providing an Intake Coordinator Position vs. a Portion of the Center Manager's Salary

Last program year, DEW agreed to pay a proportionate share of the Center Manager's salary for the time spent overseeing the center, excluding WIA activities, as the local areas did not have all ES Regional Managers in place at the time. However, now that there is a Regional Manager in every LWIA, and now that DOL and other oversight bodies have called for a better intake process at the comprehensive centers, funding an Intake Coordinator position in every comprehensive center is a necessary use of DEW's limited funds to best serve customers as required. This will also provide a more consistent level of customer service and program knowledge which will result in a more efficient flow of program services.

- ❖ The following table is a cost analysis of the Intake Coordinator position as compared to Center Manager salary costs for WorkLink:

LWIA	DEW's Current Share of Center Manager Salary	100% of Intake Coor. (including benefits)	Increase/ (Decrease) in Cost	DEW's PY14 increase in P.S. % for Intake Coor.
Worklink	34,565	44,267	9,702	3,552

The UI Division offered a grant to help fund a front desk position for PY '13. WorkLink chose not to utilize the funds in the amount of \$24,960. This grant will not be offered in PY '14 since DEW will be funding an intake position at the comprehensive center.

Program Year 2014 Timeline

- May 1st:** DEW to send PY '14 RSA document (to include a template and all deadlines) to Administrators and COG Directors.
- July 1st:** MOU/RSA deadline for LWIAs; Start of PY '14.
- July 2nd:** Hold all funding for LWIAs that did not submit the RSA.
- September 30th:** All RSAs must be fully executed.
- October 1st:** Hold all funding for LWIAs that do not have a fully executed RSA.
- December 31st:** All LWIAs to be providing their own IT support.

Satellite Costs Analysis	\$/mo	H&M FTE	DEW FTE	DEW		Total Monthly Costs	Total Yearly Costs	DEW 9 mo		DEW 3 mo		Total Yearly Costs	DEW 6 mo		
				H&M Monthly Cost	Monthly Cost**			H&M 12 mo cost	absorbed**	DEW 3 mo cost**	Total Yearly Costs		H&M 12 mo cost	absorbed**	DEW 6 mo cost**
Eastley	600.00	2.00	2.00	300.00	300.00	600.00	7,200.00	3,600.00	2,700.00	900.00	7,200.00	3,600.00	1,800.00	1,800.00	7,200.00
Seneca	600.00	2.00	1.00	400.00	200.00	600.00	7,200.00	4,800.00	1,800.00	600.00	7,200.00	4,800.00	1,200.00	1,200.00	7,200.00
Anderson	600.00	0.50	2.50	100.00	500.00	600.00	7,200.00	1,200.00	4,500.00	1,500.00	7,200.00	1,200.00	3,000.00	3,000.00	7,200.00
Honea Path	300.00	0.50	0.50	150.00	150.00	300.00	3,600.00	1,800.00	1,350.00	450.00	3,600.00	1,800.00	900.00	900.00	3,600.00
Resource Room	500.00	5.00	6.00	227.27	272.73	500.00	6,000.00	2,727.27	2,454.55	818.18	6,000.00	2,727.27	1,636.36	1,636.36	6,000.00
	2,600.00			1,177.27	1,422.73	2,600.00	31,200.00	14,127.27	12,804.55	4,268.18	31,200.00	14,127.27	8,536.36	8,536.36	31,200.00

The following analysis is based off of if we did a 12 month lease with TCTC at the current negotiated rates for these centers and the current FTE's for the current centers.

If we did a 12 month lease with TCTC and DEW only stayed there and cost shared 3 mo. then we would owe TCTC a total of \$12,805 above and beyond our normal \$14,127.

If we did a 12 month lease with TCTC and DEW only stayed there and cost shared 6 mo. then we would owe TCTC a total of \$8,536 above and beyond our normal \$14,127.

**This does not include a monthly cost of approximately \$300 in long distance calls that is a SCDEW only expense

Current Clemson Costs	\$/mo	WIA FTE	DEW FTE	Total		Total Yearly Costs	WIA Costs		DEW Costs		Total Yearly Costs
				WIA Monthly Cost	DEW Monthly Cost		WIA Costs	DEW Costs			
WIB, H&M, & DEW Shared	13,342.65	14	14	6,671.33	6,671.33	13,342.65	20,013.98	49,446.31	20,013.98	70,637.58	
Phone & IT (non WIB)	960.00	7	14	320.00	640.00	960.00	960.00	2,240.00	1,920.00	6,400.00	
	14,302.65			6,991.33	7,311.33	14,302.65	20,973.98	51,686.31	21,933.98	77,037.58	
								72,660.29		98,971.56	

NEW FTE's if 6 DEW Staff move to Clemson	\$/mo	WIA FTE	DEW FTE	Total		Total Yearly Costs	WIA Costs		DEW Costs		Total Yearly Costs
				WIA Monthly Cost	DEW Monthly Cost		WIA Costs	DEW Costs			
WIB, H&M, & DEW Shared	13,342.65	14	20	5,494.03	7,848.62	13,342.65	40,027.96	32,964.20	40,027.96	47,091.72	
Phone & IT (non WIB)	960.00	7	20	248.89	711.11	960.00	1,920.00	1,493.33	3,840.00	4,266.67	
	14,302.65			5,742.92	8,559.73	14,302.65	41,947.96	34,457.54	43,867.96	51,358.39	
								76,405.50		95,226.35	

WIA Costs updated FTE current FTE updated for current FTE for remaining 6 months

DEW Costs updated for FTE for remaining 6 months

Total Yearly Costs with this model

Current Costs with Current FTE's at Current Locations	WIA Yearly Cost	DEW Yearly Cost**	Total Yearly Costs	Clemson & Satellites	
				WIA Yearly Cost	DEW Yearly Cost**
Costs with DEW FTE's moved to Clemson and WIA absorb remaining 9 mo of DEW Costs at Satellites	98,023.20	104,808.65	202,831.85	98,023.20	104,808.65
Difference	99,592.11	103,239.74	202,831.85	1,568.91	(1,568.91)

Current Costs with Current FTE's at Current Locations	WIA Yearly Cost	DEW Yearly Cost**	Total Yearly Costs	Clemson & Satellites	
				WIA Yearly Cost	DEW Yearly Cost**
Costs with DEW FTE's moved to Clemson after 3 mo and no longer owe DEW Costs at Satellites (only absorb Resource Room Costs)	98,023.20	104,808.65	202,831.85	98,023.20	104,808.65
Difference	89,242.11	103,239.74	192,481.85	(8,781.09)	(1,568.91)

Current Costs with Current FTE's at Current Locations	WIA Yearly Cost	DEW Yearly Cost**	Total Yearly Costs	Clemson & Satellites	
				WIA Yearly Cost	DEW Yearly Cost**
Costs with DEW FTE's moved to Clemson after 6 mo and no longer owe DEW Costs at Satellites (only absorb Resource Room Costs)	98,023.20	104,808.65	202,831.85	92,169.14	103,762.71
Difference	92,169.14	103,762.71	195,931.85	(5,854.06)	(1,045.94)

WIA Costs updated FTE current FTE updated for current FTE for remaining 6 months

DEW Costs updated for FTE for remaining 6 months

Total Yearly Costs with this model



Worklink Workforce Investment Board Grant #13A995H1&13D995H1

Budget vs. Actual Expenditures YTD

codes	ADULT				DLW				TOTAL								
	Updated to Mod #3	March	April	Total Expenses	Balance	% Spent	Updated to Mod #3	March	April	Total Expenses	Balance	% Spent	Total Budget	Total Expenses	Total Balance	Total % Spent	
		2/24-3/23	3/24-4/27	3/24-4/27			Budget	2/24-3/23	3/24-4/27	3/24-4/27							
*After Mod #2																	
00	363,241	29,810	36,223	310,788	52,453	85.56%	63,942	5,720	5,641	56,579	7,363	88.46%	427,183	367,367	59,816	86.00%	
01-05	178,951	11,832	14,414	120,602	58,349	67.39%	31,501	2,478	2,774	22,260	9,241	70.66%	210,452	142,862	67,590	67.88%	
	\$ 542,192	\$ 41,642	\$ 50,637	\$ 431,390	\$ 110,802	79.98%	\$ 95,443	\$ 8,198	\$ 8,665	\$ 78,839	\$ 16,604	82.80%	\$ 637,635	\$ 510,229	\$ 127,406	80.02%	
Operating Costs																	
1.2	7,653	207	1,110	2,998	4,655	39.17%	1,347	37	198	543	804	40.31%	9,000	3,541	5,459	39.34%	
1.3	2,347	-	-	2,347	0.00%	85%	413	-	-	-	413	0.00%	2,760	-	2,760	0.00%	
1.4	10,204	-	2,038	5,313	4,891	52.07%	1,796	-	380	947	849	52.73%	12,000	6,260	5,740	52.17%	
1.5	9,005	948	1,003	7,858	1,147	87.26%	1,585	187	181	1,391	194	87.76%	10,590	9,249	1,341	87.34%	
1.6	27,120	2,251	6,245	20,453	6,667	75.42%	4,774	418	1,158	3,734	1,040	78.22%	31,894	24,187	7,707	75.84%	
1.7	4,082	-	(96)	1,974	2,108	48.36%	718	-	(17)	276	442	38.44%	4,800	2,290	2,550	46.88%	
1.8	10,001	2,157	-	8,160	1,841	81.59%	1,760	381	-	1,452	308	82.50%	11,761	9,612	2,149	81.73%	
2.11	5,357	-	-	5,355	2	99.96%	943	-	-	945	(2)	100.21%	6,300	6,300	-	100.00%	
1.8	4,362	90	256	1,406	2,956	32.23%	768	16	45	250	518	32.65%	5,130	1,656	3,474	32.29%	
	\$ 80,131	\$ 5,853	\$ 10,557	\$ 53,617	\$ 26,614	68.78%	\$ 14,104	\$ 1,018	\$ 1,923	\$ 9,538	\$ 4,566	67.83%	\$ 94,235	\$ 63,055	\$ 31,180	66.91%	
Training cost																	
2.1	10,816	1,055	1,076	3,223	7,593	29.80%	1,904	2,181	592	3,213	(1,309)	168.75%	12,720	6,436	6,284	50.60%	
2.2	24,234	4,738	1,103	15,347	8,887	63.33%	4,266	(1,041)	560	4,835	(569)	113.34%	28,500	20,162	8,318	70.81%	
2.3	18,282	1,500	85	6,827	11,455	37.34%	3,218	-	38	1,260	1,958	39.15%	21,500	8,087	13,413	37.61%	
2.12	3,512	-	35	750	2,762	21.36%	618	12	-	67	551	10.84%	4,130	817	3,313	19.78%	
2.5	87,890	-	14,527	87,858	32	99.96%	15,472	-	2,563	15,504	(32)	100.21%	103,362	103,362	-	100.00%	
2.6	29,761	-	7,438	19,688	10,073	66.15%	5,239	-	1,313	6,563	(1,324)	125.27%	35,000	26,251	8,749	75.00%	
Account/Voucher cost	235,186	31,381	11,780	116,979	118,207	49.74%	37,591	1,837	7,874	27,117	10,474	72.14%	272,777	144,096	128,681	52.83%	
On the Job Training	79,200	3,708	(599)	32,683	46,517	41.27%	14,400	-	2,639	2,639	11,761	18.33%	93,600	35,322	58,278	37.74%	
	\$ 488,881	\$ 42,380	\$ 35,445	\$ 283,355	\$ 205,626	57.86%	\$ 82,708	\$ 3,008	\$ 15,378	\$ 61,188	\$ 21,510	73.99%	\$ 571,669	\$ 344,553	\$ 227,036	60.26%	
Supportive Service Cost																	
3.2	15,750	835	1,070	9,165	6,585	58.19%	5,250	375	350	4,230	1,020	80.57%	21,000	13,395	7,605	63.79%	
3.3	3,900	-	120	120	3,780	3.08%	1,560	-	-	-	1,560	0.00%	5,480	120	5,340	2.20%	
3.4	8,503	251	143	3,417	5,086	40.19%	1,497	(352)	25	1,525	(28)	101.87%	10,000	4,942	5,058	49.47%	
3.5	2,126	-	-	-	2,126	0.00%	374	-	-	-	374	0.00%	2,500	-	2,500	0.00%	
	\$ 30,278	\$ 1,086	\$ 1,333	\$ 12,702	\$ 17,577	41.85%	\$ 6,681	\$ 23	\$ 375	\$ 5,755	\$ 2,926	68.29%	\$ 38,980	\$ 18,457	\$ 20,503	47.37%	
Training/Professional Service Fee/Polh																	
4.1	57,074	4,433	4,840	39,878	17,086	70.05%	10,047	501	1,341	8,801	3,248	67.88%	67,121	46,779	20,342	69.69%	
4.2	8,680	-	-	-	8,680	0.00%	1,530	-	-	-	1,530	0.00%	10,220	-	10,220	0.00%	
4.3	98,800	7,885	8,645	70,166	28,714	70.25%	17,582	1,052	2,348	11,904	5,878	67.71%	117,462	82,070	35,392	69.87%	
	\$ 165,644	\$ 12,398	\$ 13,585	\$ 110,144	\$ 55,500	68.48%	\$ 28,159	\$ 1,853	\$ 3,897	\$ 18,705	\$ 10,464	64.15%	\$ 184,803	\$ 128,849	\$ 65,954	66.14%	
TOTALS	\$ 1,307,127	\$ 102,658	\$ 111,597	\$ 891,108	\$ 416,018	66.17%	\$ 230,085	\$ 13,889	\$ 31,078	\$ 174,035	\$ 56,060	75.64%	\$ 1,537,222	\$ 1,065,143	\$ 472,079	69.26%	

(1) Employer has choice of being paid monthly, quarterly, or at the end of the contract.



1400 – WorkLink (Adult-Dislocated Worker) Contract Budget Modification #4

Contractor: Henkels & McCoy, Inc.
Contract #'s: 13A995H1 & 13D995H1
Program: SC Works Operator (Adult & Dislocated Worker Services)
Submission Date: 5/14/2014
Region Manager: Kal Kunkel
Program Manager (s): Karen Craven, Steve Riddle, & Matt Fields

Budget Modification Summary & Narrative

Budget Summary

Henkels & McCoy, Inc. (SC Works Operator) is requesting a modification to our PY13 budget to de-obligate \$69,775.64 as a result of lower Staff Health Insurance costs, lower Operating Costs, a decreased demand for Transportation (staff is maximizing community resources), no demand for Emergency Assistance (staff is maximizing community resources), and lower than planned On-the-Job Training (less demand in Anderson and Pickens Counties and our commitment to the county fair share). In our request we are also moving some tuition funds to participants books to cover an overage in that line item.

Staff Costs Narrative

Reduce the Health Insurance costs in the Staff Fringe rate by \$29,650.32. Our planned cost per man hour for Health Insurance this year was \$6.36 per man hour, but the actual cost has run at \$5.10 based on utilization of services and other discounts received by the company.

CONTRACT BUDGET MODIFICATION

WorkLink SC Works Operator (H&M)
PY13

Staff Postions	Staff PY13		PY13 Budget Mod #3	Staff PY13	PY13 Budget Mod #4	Amt of Increase or Decrease	% of Increase or Decrease
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Salary information removed

Sub-Total of Staff Costs			\$ 427,182.89		\$ 427,182.89	\$ 0	0.00%
Fringe Benefits		Rate					
Health Insurance		35.03%	\$ 149,663.52	28.09%	\$ 120,013.20	\$ (29,650)	-19.81%
FICA		7.65%	\$ 32,679.49	7.65%	\$ 32,679.49	\$ 0	0.00%
State UEC-SUI		3.05%	\$ 13,029.08	3.05%	\$ 13,029.08	\$ (0)	0.00%
FUT		0.14%	\$ 598.06	0.14%	\$ 598.06	\$ (0)	0.00%
SC WC		0.34%	\$ 1,452.42	0.34%	\$ 1,452.42	\$ 0	0.00%
Public-General Liability		3.05%	\$ 13,029.08	3.05%	\$ 13,029.08	\$ (0)	0.00%
Temporary Fees (UI Staff)		0.00%	\$ -	0.00%	\$ -	\$ -	100.00%
Sub-Total Fringe:		49.26%	\$ 210,451.65		\$ 180,801.33	\$ (29,650)	-14.09%
TOTAL			\$ 637,634.54		\$ 607,984.22	\$ (29,650.32)	-4.65%

CONTRACT BUDGET MODIFICATION

Operating Costs Narrative

Reduce Operating Costs by \$6,710.00 in the line items shown below.

Operating Costs					
1 1 Facility, Utilities, Maintenance	\$ -	\$ -	\$ -	0.00%	
1 2 Staff Consumable Supplies	\$ 9,000.00	\$ 7,200.00	\$ (1,800)	-20.00%	
1 3 Advertising, Outreach	\$ 2,760.00	\$ 2,400.00	\$ (360)	-13.04%	
1 4 Copy, Print	\$ 12,000.00	\$ 9,600.00	\$ (2,400)	-20.00%	
1 5 Communications	\$ 10,590.46	\$ 10,590.46	\$ 0	0.00%	
1 6 Staff Travel	\$ 31,893.84	\$ 31,893.84	\$ 0	0.00%	
1 7 Staff Conferences, Training	\$ 4,800.00	\$ 3,900.00	\$ (900)	-18.75%	
1 8 Staff Computer Leases	\$ 18,060.95	\$ 18,060.95	\$ (0)	0.00%	
1 9 Postage	\$ 5,130.00	\$ 3,880.00	\$ (1,250)	-24.37%	
Sub-Total Operating	\$ 94,235.25	\$ 87,525.25	\$ (6,710)	-7.12%	

Training Costs Narrative

Reduce On-the-Job Training by \$17,280 (Adult \$14,400 & DW \$2,880) and College Tuition by \$2,783 (Dislocated Worker only) and increase Participant Books by \$3,200 (Dislocated Worker only).

Training					
2 1 Participant Supplies	\$ 12,720.00	\$ 12,720.00	\$ -	0.00%	
2 2 Participant Books	\$ 28,500.00	\$ 31,700.00	\$ 3,200	11.23%	
2 3 Credential Exam Fees (NRF, CNA, GED, etc.)	\$ 21,500.00	\$ 21,500.00	\$ (0)	0.00%	
2 4 TABE Testing Materials	\$ -	\$ -	\$ -	0.00%	
2 5 Tuition (Adult Education)	\$ 103,362.00	\$ 103,362.00	\$ -	0.00%	
2 6 Tuition (College or Vocational)	\$ 307,776.98	\$ 305,033.86	\$ (2,743)	-0.89%	
2 8 On-the-Job Training	\$ 93,600.00	\$ 76,320.00	\$ (17,280)	-18.46%	
2 10 Awards / Events	\$ -	\$ -	\$ -	0.00%	
2 12 WorkKeys	\$ 4,130.00	\$ 4,130.00	\$ -	0.00%	
Sub-Total Training	\$ 571,588.98	\$ 554,765.86	\$ (16,823)	-2.94%	

Supportive Services Narrative

Reduce Transportation by \$5,250 (Adult \$2,625 & DW \$2,625) and Emergency Assistance by \$2,500 (Adult \$2,125.79 & 374.21).

Supportive Services					
3 2 Transportation	\$ 21,000.00	\$ 15,750.00	\$ (5,250)	-25.00%	
3 3 Childcare	\$ 5,460.00	\$ 5,460.00	\$ -	0.00%	
3 4 Training Support Materials	\$ 10,000.00	\$ 10,000.00	\$ -	0.00%	
3 5 Emergency Assistance	\$ 2,500.00	\$ -	\$ (2,500)	-100.00%	
Sub-Total of Supportive Services	\$ 38,960.00	\$ 31,210.00	\$ (7,750)	-19.89%	

CONTRACT BUDGET MODIFICATION

Training Fees (Profit), Indirect, & Audit Fees

Reduce the Training Fee (Profit) by \$3,047, Indirect Costs by \$5,332, and Audit Fee by \$464. These are proportional to percentage applied for the amounts being reduced.

Indirect Cost & Fees						
Training Fee (Profit)	5.00%	\$ 67,120.94	5.00%	\$ 64,074.27	\$ (3,047)	-4.54%
Indirect Cost	8.75%	\$ 117,461.64	8.75%	\$ 112,129.97	\$ (5,332)	-4.54%
Audit Fee	0.70%	\$ 10,219.16	0.70%	\$ 9,755.31	\$ (464)	-4.54%
Sub-Total of Indirect & Fees		\$ 194,801.74		\$ 185,959.54	\$ (8,842)	

APPROVAL(S)

Prepared By *Kalen J. Kunkel*
 Kalen J. Kunkel, Region Manager

	Adult			DW			Youth			Total			
	PV 13	PV 14	Difference	PV 13	PV 14	Difference	PV 13	PV 14	Difference	PV 13	PV 14	Difference	
Trident	1,294,772.00	1,239,653.00	(55,119.00)	1,440,251.00	1,368,838.00	(71,413.00)	1,390,952.00	1,348,871.00	(42,081.00)	4,125,975.00	3,957,362.00	(168,613.00)	
Greenville	867,081.00	840,134.00	(26,947.00)	929,088.00	995,068.00	65,980.00	883,928.00	861,848.00	(22,080.00)	2,680,097.00	2,697,050.00	16,953.00	
Upper Savannah	656,918.00	658,438.00	1,520.00	815,334.00	832,070.00	16,736.00	663,777.00	645,337.00	(18,440.00)	2,136,029.00	2,135,845.00	(184.00)	
Upstate	953,189.00	945,905.00	(7,284.00)	937,534.00	932,213.00	(5,321.00)	976,959.00	978,891.00	1,932.00	2,867,682.00	2,857,009.00	(10,673.00)	
Midlands	1,349,425.00	1,335,489.00	(13,936.00)	1,945,538.00	1,505,849.00	(439,689.00)	1,473,962.00	1,472,087.00	(1,875.00)	4,768,925.00	4,313,425.00	(455,500.00)	
WorkLink	832,761.00	814,228.00	(18,533.00)	823,748.00	722,796.00	(100,952.00)	891,462.00	877,553.00	(13,909.00)	2,547,971.00	2,414,577.00	(133,394.00)	
Lower Savannah	938,680.00	978,594.00	39,914.00	1,168,073.00	1,346,915.00	178,842.00	907,896.00	956,665.00	48,769.00	3,014,649.00	3,282,174.00	267,525.00	
Fee Dec	1,102,617.00	1,108,674.00	6,057.00	1,100,676.00	1,219,675.00	118,999.00	1,151,630.00	1,106,552.00	(45,078.00)	3,354,923.00	3,434,901.00	79,978.00	
Catawba	1,003,889.00	1,012,295.00	8,406.00	785,068.00	792,882.00	7,814.00	1,028,705.00	1,044,411.00	15,706.00	2,817,662.00	2,849,588.00	31,926.00	
Lowcountry	612,887.00	609,085.00	(3,802.00)	600,650.00	525,172.00	(75,478.00)	612,960.00	614,202.00	1,242.00	1,826,497.00	1,748,459.00	(78,038.00)	
Waccamaw	502,911.00	494,747.00	(8,164.00)	496,853.00	500,904.00	4,051.00	544,676.00	546,214.00	1,538.00	1,544,440.00	1,541,865.00	(2,575.00)	
Local Area Totals	11,159,408.00	11,072,636.00	(86,772.00)	12,362,497.00	11,854,130.00	(508,367.00)	11,544,363.00	11,474,108.00	(70,255.00)	35,066,268.00	34,400,874.00	(665,394.00)	
Statewide Activities	587,337.00	455,040.00	(132,297.00)	772,656.00	582,990.00	(189,666.00)	607,598.00	471,539.00	(136,059.00)	1,967,591.00	1,509,569.00	(458,022.00)	
State Administration	-	606,720.00	606,720.00	777,320.00	777,320.00	0.00%	-	628,718.00	628,718.00	100.00%	2,012,758.00	2,012,758.00	0.00%
State Rapid Response	-	-	-	2,317,968.00	2,331,960.00	13,992.00	607,598.00	-	-	0.00%	2,317,968.00	2,331,960.00	13,992.00
State Totals	587,337.00	1,061,760.00	474,423.00	3,090,624.00	3,692,270.00	601,646.00	607,598.00	1,100,257.00	492,659.00	77.61%	4,285,559.00	5,854,287.00	1,568,728.00
Total Allocation	11,746,745.00	12,134,396.00	387,651.00	15,453,121.00	15,546,400.00	93,279.00	12,151,961.00	12,574,365.00	422,404.00	39,351,827.00	40,255,161.00	903,334.00	

	Program Adult*	Admin Adult*	Program DW*	Admin DW*	Program Youth	Admin Youth	Total	
*Funds not received from SCDEW yet								
PY'14 Allocations (NFA-14-01)	732,805	81,423	650,516	72,280	789,798	87,755	2,414,577	
Transfer of funds (50%)	325,258	-	(325,258)	-	-	-	-	
Possible H&M Carryover (95% spend after Mod #4)	62,477	-	10,895	-	41,996	-	115,368	
PY'13 Undesignated Carryover	251,145	39,396	244,801	57,075	312,140	30,746	935,303	
	1,371,685	120,819	580,954	129,355	1,143,934	118,501	3,465,248	
Obligations								
Henkels & McCoy - Adult	1,015,000	-	-	-	-	-	1,015,000	(234,537)
Henkels & McCoy - DW	-	-	435,000	-	-	-	435,000	217,093
Henkels & McCoy - Youth	-	-	-	-	800,000	-	800,000	(39,929)
Undesignated Funds	106,920	15,166	41,201	16,672	215,163	6,941	402,063	(533,240)
Total Pass-Through Contracts	1,121,920	15,166	476,201	16,672	1,015,163	6,941	2,652,063	(590,613)
Total Revenue after Obligations	249,765	105,653	104,753	112,683	128,771	111,560	813,185	
In-House Expenses								
Salaries (Reduced by BR & JK to NEG & MiaA)	109,503	36,285	41,293	36,281	67,089	42,790	333,241	(16,575)
Fringe (Reduced by BR & JK to NEG & MiaA)	33,579	12,314	12,928	12,312	20,934	14,435	106,502	(2,130)
SC Works Centers & Satellites Facility Costs	117,394	17,360	49,985	12,212	2,573	12,212	211,736	(41,149)
Payment from SCDEW for Facilities	(74,206)	-	(31,803)	-	-	-	(106,009)	12,096
Travel - Training/Conferences/Meetings	2,000	2,000	2,000	2,000	-	2,000	6,000	(2,500)
Travel - Committee/Board	1,550	1,550	-	1,550	-	3,000	6,100	3,600
AOP BIS Transportation (\$5k appr by YC)	-	-	-	-	5,000	-	5,000	5,000
Supplies - Consumable	750	750	-	750	-	750	2,250	-
Supplies - Non-Consumable	335	335	-	335	-	330	1,000	-
EMSI Data Charges (Removed from PY)	-	-	-	-	-	-	-	(3,375)
Outside Services (Strategic Plan)	7,500	5,000	10,000	15,000	5,000	2,500	45,000	(45,000)
Consulting	70	70	-	70	-	70	210	-
Insurance - Tort (\$640/mo)	1,920	1,920	-	3,845	-	1,920	7,685	125
Insurance - Bldg & PP (\$8/mo)	25	25	-	50	-	25	100	100
Insurance - Auto C&C (\$15.50/mo)	50	50	-	95	-	50	195	5
Insurance - Auto Liab (\$64/mo)	195	195	-	385	-	195	775	5
Postage	170	170	-	170	-	160	500	-
Printing	1,834	1,834	-	1,833	-	1,833	5,500	-
Telephone Voice (Removed from PY)	-	-	-	-	-	-	-	(1,620)
Telephone LD (Removed from PY)	-	-	-	-	-	-	-	(468)
Cellphone (Removed from PY)	-	-	-	-	-	-	-	(12)
Web Site Hosting & Renewal Fees	2,360	2,360	-	2,360	-	2,360	7,080	-
Memberships, Dues, & Prof Fees	1,250	1,250	-	1,250	-	950	3,450	150
Training	3,500	3,500	-	3,500	-	2,500	9,500	(10,500)
Job Fair / Hiring Event Expenses	-	-	-	-	-	-	-	(22,000)
Rent - WorkLink Pendleton Office (Rem from PY)	-	-	-	-	-	-	-	(606)
R&M & Gas - WIA Car	835	835	-	835	-	830	2,500	-
IT Maint/Support (WIB Only)	1,600	1,600	-	1,600	-	1,500	4,700	(7,310)
Outreach (SC Works Center's Only)	10,000	-	5,000	-	-	-	15,000	10,000
Meeting Expense (Madren Center & Other)	1,000	1,000	-	1,000	-	3,175	5,175	175
Indirect Cost Pool (42% of salaries)	45,995	15,250	17,350	15,250	28,175	17,975	139,995	(6,928)
Total In-House	249,765	105,653	104,753	112,683	128,771	111,560	813,185	(38,917)
Will add after true carryover amounts								

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
GRANT BUDGET SUMMARY

Service Provider Henkels & McCoy, Inc Contract # 14A995H1 & 14D995H1

Project/Activity SC Works Operator Funding Source WIA Adult & DLW Formula Funds Modification # _____

CATEGORIES	ADULT	DLW	Administration	Non-Administration	Total Budget Amount
STAFF COSTS (Salaries & Fringe Benefits)	\$ 481,000.78	\$ 206,143.19		\$ 687,143.97	\$ 687,143.97
OPERATING COSTS	\$ 58,365.76	\$ 25,013.90		\$ 83,379.66	\$ 83,379.66
TRAINING COSTS	\$ 324,751.00	\$ 139,299.00		\$ 464,050.00	\$ 464,050.00
SUPPORTIVE SERVICE COSTS	\$ 22,174.25	\$ 9,503.25		\$ 31,677.50	\$ 31,677.50
Training Fees/Professional Fees/ Profit	\$ 51,066.33	\$ 21,885.57		\$ 72,951.89	\$ 72,951.89
Indirect Costs	\$ 77,557.88	\$ 33,239.09		\$ 110,796.97	\$ 110,796.97
Total Budget Costs	\$ 1,014,916.00	\$ 435,084.00	\$ -	\$ 1,450,000.00	\$ 1,450,000.00
Percentage of Budget	70%	30%		100%	
Cost Limitations			2% Maximum	At least 98%	100%

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

Service Provider Henkels & McCoy, Inc.

Contract # 14A995H1 & 14D995H1

Project/ Activity SC Works Operator

Funding Source WIA Adult & DLW Formula Funds

Mod # _____

STAFF & INDIRECT COST - BUDGET SUMMARY

SALARIES, FRINGE BENEFITS, & INDIRECT COST				ADULT		DLW		ADMINISTRATION		NON-ADMINISTRATION		
Staff Salaries: Position Title	Salary Per Month	No. of Months	% of Time	TOTAL AMOUNT	%	Amount	%	Amount	%	Amount	%	Amount

Salary information removed

TOTAL SALARIES				\$ 485,888		\$ 340,122		\$ 145,766				\$ 485,888
FRINGE BENEFITS:												
Health Insurance		X	27.29%	\$ 132,600	70.00%	\$ 92,820	30.00%	\$ 39,780			100%	\$ 132,600
FICA		X	7.65%	\$ 37,170	70.00%	\$ 26,019	30.00%	\$ 11,151			100%	\$ 37,170
State UEC-SUI		X	3.02%	\$ 14,674	70.00%	\$ 10,272	30.00%	\$ 4,402			100%	\$ 14,674
FUT		X	0.12%	\$ 583	70.00%	\$ 408	30.00%	\$ 175			100%	\$ 583
SC WC		X	0.32%	\$ 1,555	70.00%	\$ 1,088	30.00%	\$ 466			100%	\$ 1,555
Public-General Liability		X	3.02%	\$ 14,674	70.00%	\$ 10,272	30.00%	\$ 4,402			100%	\$ 14,674
		X	0.00%	\$ -	70.00%	\$ -	30.00%	\$ -			100%	\$ -
TOTAL FRINGE BENEFITS				\$ 201,256		\$ 140,879		\$ 60,377				\$ 201,256
INDIRECT COST: RATE	\$ 1,266,251.13	X	8.75%	\$ 110,797	70.00%	\$ 77,558	30.00%	\$ 33,239			100%	\$ 110,797
TOTAL COST				\$ 797,941	70.00%	\$ 558,559	30.00%	\$ 239,382			100%	\$ 797,941

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

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

Service Provider Henkels & McCoy, Inc. Contract # 14A995H1 & 14D995H1 Mod # _____
Project/Activity SC Works Operator Fund Source WIA Adult & DLW Formula Funds

Categories & Line Items	Total Cost	ADULT	DLW	Non-Administration
OPERATING COSTS				
1.2 Staff Expendable Supplies & Materials	\$ 8,400	\$ 5,880	\$ 2,520	\$ 8,400
1.3 Program Outreach Expenses (Brochures, Flyers, etc.)	\$ 2,760	\$ 1,932	\$ 828	\$ 2,760
1.4 Copy & Print Expenses	\$ 10,800	\$ 7,560	\$ 3,240	\$ 10,800
1.5 Communications (Phone, Fax, Internet, etc.)	\$ 11,141	\$ 7,799	\$ 3,342	\$ 11,141
1.6 Staff Travel				
Local Mileage cost	\$ 19,998	\$ 13,998	\$ 5,999	\$ 19,998
Non-Local Mileage cost	\$ 2,000	\$ 1,400	\$ 600	\$ 2,000
Non-Local Per Diem/Lodging Cost	\$ 3,000	\$ 2,100	\$ 900	\$ 3,000
1.7 Staff Training / Technical Services Costs (Conf, Training, etc.)	\$ 4,080	\$ 2,856	\$ 1,224	\$ 4,080
1.8 Non-Expendable Equipment Purchases (Computers, software, etc.)				
Non-Expendable Equipment Purchases (Computer Leases)	\$ 12,485	\$ 8,739	\$ 3,745	\$ 12,485
Wide Area Network (WAN) Equipment and Computer Software	\$ 6,300	\$ 4,410	\$ 1,890	\$ 6,300
1.9 Postage (Stamps, FedEx, etc.)	\$ 2,416	\$ 1,691	\$ 725	\$ 2,416
TOTAL OPERATING COSTS	\$ 83,380	\$ 58,366	\$ 25,014	\$ 83,380
TRAINING COSTS				
2.1 WI Customer Supplies & Materials Costs	\$ -	\$ -	\$ -	\$ -
2.2 WI Customer Book Costs	\$ -	\$ -	\$ -	\$ -
2.3 WI Customer Credential Exam Fees (C.N.A., GED, TABE, WorkKeys)	\$ 15,950	\$ 11,165	\$ 4,785	\$ 15,950
2.4 Other: TABE Assessment Costs	\$ -	\$ -	\$ -	\$ -
2.12 Other: WorkKeys Assessment Costs	\$ -	\$ -	\$ -	\$ -
WI Customer Individualized Training Costs				
2.5 Tuition Cost (Adult Education Skill Upgrade & GED)	\$ 77,280	\$ 54,096	\$ 23,184	\$ 77,280
2.6 Other Individualized Training Cost (TCTC Pre-Employment Work)	\$ -	\$ -	\$ -	\$ -
2.6 Individual Training Account/Voucher Cost	\$ 308,900	\$ 216,290	\$ 92,610	\$ 308,900
2.8 WI Customer On-the-Job Training Costs				
Reimbursable Wages	\$ 61,920	\$ 43,200	\$ 18,720	\$ 61,920
TOTAL TRAINING COSTS	\$ 464,050	\$ 324,751	\$ 139,299	\$ 464,050
SUPPORTIVE SERVICES COSTS				
3.1 WI Customer Incentives (Youth Only)	\$ -	\$ -	\$ -	\$ -
3.2 WI Customer Transportation Costs	\$ 17,938	\$ 12,556	\$ 5,381	\$ 17,938
3.3 WI Customer Childcare Costs	\$ 6,240	\$ 4,368	\$ 1,872	\$ 6,240
3.4 Training Support Materials (Uniforms, Drug Screens, Background Checks, etc.)	\$ 7,500	\$ 5,250	\$ 2,250	\$ 7,500
3.5 WI Customer Emergency Assistance (Rent, Car Repair, etc.)	\$ -	\$ -	\$ -	\$ -
3.6 Laptop Incentive (Youth Only)	\$ -	\$ -	\$ -	\$ -
TOTAL SUPPORTIVE SERVICES COSTS	\$ 31,678	\$ 22,174	\$ 9,503	\$ 31,678
TRAINING/PROFESSIONAL FEES/PROFIT				
4.1 Profit (Professional Fee - 5%) Can be tied to Performance	\$ 63,313	\$ 44,319	\$ 18,994	\$ 63,313
4.2 Audit Fee	\$ 9,639	\$ 6,748	\$ 2,892	\$ 9,639
TOTAL FEES / PROFIT COSTS	\$ 72,952	\$ 51,066	\$ 21,886	\$ 72,952

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

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
CLIENT FLOW PROJECTIONS

Service Provider Henkels & McCoy, Inc. Contract # 14A995H1 & 14D995H1
 Project Activity SC Works Operator Fund Source WIA Adult & DLW Formula Funds
 Mod# _____

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

Active Clients equal Cumulative Clients Served minus Cumulative Clients Exited

**WorkLink SC Works Operator (H&M)
PY14 PROPOSED BUDGET (Option B)**

Staff Postions	Staff PY13		PY13 Budget Mod# 4	Staff PY14	PY14 Proposed Budget	Amt of Increase or Decrease
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Salary information removed

Sub-Total of Staff Costs			\$ 427,182.89		\$ 485,888.00	\$ 58,705.11
Fringe Benefits		Rate				
Health Insurance		28.09%	\$ 120,013.20	27.29%	\$ 132,600.00	\$ 12,586.80
FICA		7.65%	\$ 32,679.49	7.65%	\$ 37,170.43	\$ 4,490.94
State UEC-SUI		3.05%	\$ 13,029.08	3.02%	\$ 14,673.82	\$ 1,644.74
FUT		0.14%	\$ 598.06	0.12%	\$ 583.07	\$ (14.99)
SC WC		0.34%	\$ 1,452.42	0.32%	\$ 1,554.84	\$ 102.42
Public-General Liability		3.05%	\$ 13,029.08	3.02%	\$ 14,673.82	\$ 1,644.74
Temporary Fees (UI Staff)		0.00%	\$ -	0.00%	\$ -	\$ -
Sub-Total Fringe:		42.32%	\$ 180,801.33		\$ 201,255.97	\$ 20,454.64
TOTAL			\$ 607,984.22		\$ 687,143.97	\$ 79,159.75

47.39%

**WorkLink SC Works Operator (H&M)
PY13 vs PY14 Comparison (Option B)**

		PY13 Budget Mod #4		PY14 Proposed Budget	Amt of Increase or Decrease	
Operating Costs						
1.1 Facility, Utilities, Maintenance		\$ -		\$ -	\$ -	
1.2 Staff Consumable Supplies		\$ 7,200.00		\$ 8,400.00	\$ 1,200.00	
1.3 Advertising, Outreach		\$ 2,400.00		\$ 2,760.00	\$ 360.00	
1.4 Copy, Print		\$ 9,600.00		\$ 10,800.00	\$ 1,200.00	
1.5 Communications		\$ 10,590.46		\$ 11,141.00	\$ 550.54	
1.6 Staff Travel		\$ 31,893.84		\$ 24,997.77	\$ (6,896.07)	
1.7 Staff Conferences, Training		\$ 3,900.00		\$ 4,080.00	\$ 180.00	
1.8 Staff Computer Leases		\$ 18,060.95		\$ 18,784.95	\$ 724.00	
1.9 Postage		\$ 3,880.00		\$ 2,415.94	\$ (1,464.06)	
Sub-Total Operating		\$ 87,525.25		\$ 83,379.66	\$ (4,145.59)	5.75%
Training						
2.1 Participant Supplies		\$ 12,720.00		\$ -	\$ (12,720.00)	
2.2 Participant Books		\$ 31,700.00		\$ -	\$ (31,700.00)	
2.3 Credential Exams & Assessments		\$ 21,500.00		\$ 15,950.00	\$ (5,550.00)	
2.4 TABE Testing Materials		\$ -		\$ -	\$ -	
2.5 Tuition (Adult Education)		\$ 103,362.00		\$ 77,280.00	\$ (26,082.00)	
2.6 Tuition (College or Vocational)		\$ 305,033.86		\$ 308,900.00	\$ 3,866.14	
2.8 On-the-Job Training		\$ 76,320.00		\$ 61,920.00	\$ (14,400.00)	
2.10 Awards / Events		\$ -		\$ -	\$ -	
2.12 WorkKeys		\$ 4,130.00		\$ -	\$ (4,130.00)	
Sub-Total Training		\$ 554,765.86		\$ 464,050.00	\$ (90,715.86)	32.00%
Supportive Services						
3.2 Transportation		\$ 15,750.00		\$ 17,937.50	\$ 2,187.50	
3.3 Childcare		\$ 5,460.00		\$ 6,240.00	\$ 780.00	
3.4 Training Support Materials		\$ 10,000.00		\$ 7,500.00	\$ (2,500.00)	
3.5 Emergency Assistance		\$ -		\$ -	\$ -	
Sub-Total of Supportive Services		\$ 31,210.00		\$ 31,677.50	\$ 467.50	2.18%
Sub-Total of Contract Costs		\$ 1,281,485.33		\$ 1,266,251.13	\$ (15,234.20)	
Indirect Cost & Fees						
Training Fee (Profit)	5.00%	\$ 64,074.27	5.00%	\$ 63,312.56	\$ (761.71)	
Indirect Cost	8.75%	\$ 112,129.97	8.75%	\$ 110,796.97	\$ (1,333.00)	
Audit Fee	0.70%	\$ 9,755.31	0.70%	\$ 9,639.34	\$ (115.97)	
Sub-Total of Indirect & Fees		\$ 185,959.55		\$ 183,748.87	\$ (2,210.68)	12.67%
		\$ 1,467,444.88		\$ 1,450,000.00	\$ (17,444.88)	100.00%

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
GRANT BUDGET SUMMARY

Service Provider Henkels & McCoy, Inc Contract # 14Y495H4

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

CATEGORIES	Administration	Non-Administration	Total Budget Amount
STAFF COSTS (Salaries & Fringe Benefits)		\$ 443,797	\$ 443,797
OPERATING COSTS		\$ 52,433	\$ 52,433
TRAINING COSTS		\$ 138,426	\$ 138,426
SUPPORTIVE SERVICE COSTS		\$ 63,964	\$ 63,964
Training Fees/Professional Fees/ Profit		\$ 40,249	\$ 40,249
Indirect Costs		\$ 61,129	\$ 61,129
Total Budget Costs	\$ -	\$ 800,000	\$ 800,000
Percentage of Budget		100.00%	
Cost Limitations	2% Maximum	At least 98%	100%

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

Service Provider Henkels & McCoy, Inc.

Contract # 14Y495H4

Project/ Activity Palmetto Youth Connections

Funding Source WIA Youth Mod # _____

STAFF & INDIRECT COST - BUDGET SUMMARY

SALARIES, FRINGE BENEFITS, & INDIRECT COST					ADMINISTRATION		NON-ADMINISTRATIVE	
Staff Salaries: Position Title	Salary Per Month	No. of Months	% of Time	TOTAL AMOUNT	%	Amount	%	Amount
Salary information removed								
TOTAL SALARIES				\$323,335		\$0		\$323,335
FRINGE BENEFITS:								
FICA		X	7.65%	\$24,735		\$0		\$24,735
Workers Comp.		X	0.33%	\$1,067		\$0		\$1,067
Health & Wealth (Pos. Level)		X	23.12%	\$74,743		\$0		\$74,743
Ret. / Pension		X	0.00%	\$0		\$0		\$0
Unemployment Insurance (State & Federal)		X	3.14%	\$10,153		\$0		\$10,153
Other (Specify): General Liability Insurance		X	3.02%	\$9,765		\$0		\$9,765
TOTAL FRINGE BENEFITS			37.26%	\$120,462		\$0		\$120,462
INDIRECT COST: RATE		X	8.75%	\$ 61,129.36		\$0		\$ 61,129.36
TOTAL COST				\$504,927		\$0		\$504,927

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

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

Service Provider Henkels & McCoy, Inc

Contract # 14Y495H4

Mod # _____

Project/Activity Palmetto Youth Connections

Fund Source WIA Youth

Categories & Line Items	Total Cost	Administration	Non-Administration
OPERATING COSTS			
1.2 Staff Expendable Supplies & Materials	\$ 2,100		\$ 2,100
1.3 Program Outreach Expenses (Brochures, Flyers, etc.)	\$ 2,400		\$ 2,400
1.4 Copy & Print Expenses	\$ 4,200		\$ 4,200
1.5 Communications (Phone, Fax, Internet, etc.)	\$ 10,581		\$ 10,581
1.6 Staff Travel			
Local Mileage cost	\$ 15,016		\$ 15,016
Non-Local Mileage cost	\$ 1,600		\$ 1,600
Non-Local Per Diem/Lodging Cost	\$ 2,000		\$ 2,000
1.7 Staff Training / Technical Services Costs (Conf, Training, etc.)	\$ 2,400		\$ 2,400
1.8 Non-Expendable Equipment Purchases (Computers, software, et			
Non-Expendable Equipment Purchases (Computer Leases)	\$ 8,644		\$ 8,644
1.9 Postage (Stamps, FedEx, etc.)	\$ 3,493		\$ 3,493
TOTAL OPERATING COSTS	\$ 52,433	\$ -	\$ 52,433
TRAINING COSTS			
2.1 WI Customer Supplies & Materials Costs	\$ 3,700		\$ 3,700
2.2 WI Customer Book Costs	\$ 5,985		\$ 5,985
2.3 WI Customer Credential Exam Fees (C.N.A., GED, TABE, WorkKeys,	\$ 14,380		\$ 14,380
2.4 Other: TABE Assessment Costs	\$ 1,425		\$ 1,425
2.12 Other: WorkKeys Assessment Costs	\$ 1,500		\$ 1,500
WI Customer Individualized Training Costs			
2.5 Tuition Cost (Adult Education Skill Upgrade & GED)	\$ 38,758		\$ 38,758
2.6 Individual Training Account/Voucher Cost	\$ 28,958		\$ 28,958
2.9 WI Customer Work Experience Costs			
Reimbursable Wages	\$ 38,280		\$ 38,280
2.10 WI Customer Awards & Recognition Costs	\$ 1,600		\$ 1,600
2.11 Software Licenses	\$ 3,840		\$ 3,840
TOTAL TRAINING COSTS	\$ 138,426	\$ -	\$ 138,426
SUPPORTIVE SERVICES COSTS			
3.1 WI Customer Incentives (Youth Only)	\$ 37,114		\$ 37,114
3.2 WI Customer Transportation Costs	\$ 19,500		\$ 19,500
3.3 WI Customer Childcare Costs	\$ 2,400		\$ 2,400
3.4 Training Support Materials (Uniforms, Drug Screens, Background Checks, etc)	\$ 3,200		\$ 3,200
3.5 WI Customer Emergency Assistance (Rent, Car Repair, etc.)	\$ 1,750		\$ 1,750
TOTAL SUPPORTIVE SERVICES COSTS	\$ 63,964	\$ -	\$ 63,964
TRAINING/PROFESSIONAL FEES/PROFIT			
4.1 Profit (Professional Fee - 5%) Can be tied to Performance	\$ 34,931		\$ 34,931
4.2 Audit Fee	\$ 5,318		\$ 5,318
TOTAL FEES / PROFIT COSTS	\$ 40,249	\$ -	\$ 40,249

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

WORKFORCE INVESTMENT BOARD
 WorkLink Workforce Investment Area
CLIENT FLOW PROJECTIONS

Service Provider Henkels & McCoy, Inc.

Contract # 14Y495H4

Project/Activity Palmetto Youth Connections

Fund Source WIA

Mod # _____

Period	Clients Served			Clients Exited Cumulative	Active Clients
	Carryover	New	Cumulative		
July-14	55	5	60	10	50
August-14	50	15	65	10	55
September-14	55	15	70	20	50
October-14	50	10	60	10	50
November-14	50	5	55	10	45
December-14	45	5	50	10	40
January-15	40	10	50	10	40
February-15	40	15	55	10	45
March-15	45	15	60	10	50
April-15	50	15	65	5	60
May-15	60	15	75	10	65
June-15	65	5	70	10	60
Carryovers	55	130			
New Enrollments		130			
Follow-up Cases		70			
Total Served		255			
Planned Carryovers	60				

Active Clients equal Cumulative Clients Served minus Cumulative Clients Exited

**WorkLink PYC Budget Comparison
PY13 vs. PY14**

		PY13 Budget		PY14 Budget Option A	Amt of Increase or Decrease
Slot Level					
		175		185	10
Staff Costs					
Salary information removed					
Sub-Total of Staff Costs		\$ 325,643.76		\$ 323,334.96	\$ (2,308.80)
Fringe Benefits	Rate		Rate		
Health Insurance	23.56%	\$ 76,727.04	23.64%	\$ 74,742.72	\$ (1,984.32)
FICA	7.65%	\$ 24,911.75	7.65%	\$ 24,735.12	\$ (176.63)
State UEC-SUI	3.05%	\$ 9,932.13	3.05%	\$ 9,764.72	\$ (167.41)
FUT	0.14%	\$ 455.90	0.14%	\$ 388.00	\$ (67.90)
SC WC	0.34%	\$ 1,107.19	0.34%	\$ 1,067.01	\$ (40.18)
Public-General Liability	3.05%	\$ 9,932.13	3.05%	\$ 9,764.72	\$ (167.41)
Sub-Total Fringe:	37.79%	\$ 123,066.14	37.87%	\$ 120,462.28	\$ (2,603.86)
Operating Costs					
1.1 Facility, Utilities, Maintennace		\$ -		\$ -	\$ -
1.2 Staff Consummable Supplies		\$ 6,000.00		\$ 2,100.00	\$ (3,900.00)
1.3 Advertising, Outreach		\$ 9,000.00		\$ 2,400.00	\$ (6,600.00)
1.4 Copy, Print		\$ 4,800.00		\$ 4,200.00	\$ (600.00)
1.5 Communications		\$ 10,746.00		\$ 10,580.80	\$ (165.20)
1.6 Staff Travel		\$ 26,590.00		\$ 18,616.00	\$ (7,974.00)
1.7 Staff Conferences, Training		\$ 6,000.00		\$ 2,400.00	\$ (3,600.00)
1.8 Staff Computer Leases		\$ 7,519.50		\$ 8,644.13	\$ 1,124.63
1.9 Postage		\$ 3,585.00		\$ 3,492.50	\$ (92.50)
Sub-Total Operating		\$ 74,240.50		\$ 52,433.43	\$ (21,807.08)

**WorkLink PYC Budget Comparison
PY13 vs. PY14**

		PY13 Budget		PY14 Budget Option A	Amt of Increase or Decrease
Training					
2.1 Participant Supplies		\$ 6,400.00		\$ 3,700.00	\$ (2,700.00)
2.2 Participant Books		\$ 8,000.00		\$ 5,984.75	\$ (2,015.25)
2.3 Credential Exam Fees (NRR, C.N.A., GED, etc.)		\$ 8,650.00		\$ 14,380.00	\$ 5,730.00
2.4 TABE Testing Materials		\$ 2,050.00		\$ 1,425.00	\$ (625.00)
2.5 Tuition (Adult Education Vocational)		\$ 38,758.40		\$ 38,758.40	\$ -
2.7 Dual Credit Diploma (GTC or Other)		\$ -		\$ -	\$ -
2.8 On-the-Job Training		\$ -		\$ -	\$ -
2.9 Work Experience		\$ 41,760.00		\$ 38,280.00	\$ (3,480.00)
2.10 Awards / Events		\$ 1,600.00		\$ 1,600.00	\$ -
2.11 Software Licenses		\$ 3,840.00		\$ 3,840.00	\$ -
2.12 Work Keys		\$ -		\$ 1,500.00	\$ 1,500.00
Sub-Total Training		\$ 136,048.40		\$ 138,426.50	\$ 2,378.10
Supportive Services					
3.1 Participant Incentives (Skill Invoices)		\$ 40,491.35		\$ 37,114.14	\$ (3,377.21)
3.2 Transportation		\$ 22,500.00		\$ 19,500.00	\$ (3,000.00)
3.3 Childcare		\$ 4,800.00		\$ 2,400.00	\$ (2,400.00)
3.4 Training Support Materials		\$ 3,200.00		\$ 3,200.00	\$ -
3.5 Emergency Assistance		\$ 3,500.00		\$ 1,750.00	\$ (1,750.00)
3.6 Laptop Incentive		\$ -		\$ -	\$ -
Sub-Total of Supportive Services		\$ 74,491.35		\$ 63,964.14	\$ (10,527.21)
Sub-Total of Contract Costs		\$ 733,490.15		\$ 698,621.31	\$ (34,868.84)
Indirect Cost & Fees					
Training Fee (Profit)	5.00%	\$ 36,674.51	5.00%	\$ 34,931.07	\$ (1,743.44)
Indirect Cost	8.75%	\$ 64,180.39	8.75%	\$ 61,129.36	\$ (3,051.03)
Audit Fee	0.70%	\$ 5,583.69	0.70%	\$ 5,318.25	\$ (265.44)
Sub-Total of Indirect & Fees		\$ 106,438.59		\$ 101,378.69	\$ (5,059.90)
		\$ 839,928.74		\$ 800,000.00	\$ (39,928.74)

Training Services Group



Executive Summary

WorkLink Youth Program Questions



WorkLink Youth Council & Executive Committee Update

May 28, 2014

OVERVIEW

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

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

OVERVIEW OF SERVICES & PROGRAM STATISTICS

1) PY13 Cost Per Participant Justification (\$4,799.59) – PY13 Youth Budget \$839,000 to serve 175

a) Historical Statistics

i) Budget vs. Actual Expenditures & Cost Per Participant

Program Year	BUDGET			ACTUAL			Contract Dates			Status
	Amount	Slots	Cost per	Amount	Slots	Cost per				
PY06 (9 Mo)	\$ 709,932.00	180	\$3,944.07	\$582,012.00	110	\$5,291.02	10/1/2006	to	6/30/2007	Complete
PY07	\$ 855,042.00	200	\$4,275.21	\$766,864.00	205	\$3,740.80	7/1/2007	to	6/30/2008	Complete
PY08	\$ 790,000.00	180	\$4,388.89	\$700,187.00	210	\$3,334.22	7/1/2008	to	6/30/2009	Complete
PY09 (Formula)	\$ 711,000.00	160	\$4,443.75	\$642,442.00	205	\$3,133.86	7/1/2009	to	6/30/2010	Complete
PY09 (ARRA)	\$ 263,520.00	75	\$3,513.60	\$239,397.00	81	\$2,955.52	7/1/2009	to	6/30/2010	Complete
PY09 TOTAL	\$ 974,520.00	235	\$7,957.35	\$881,839.00	286	\$6,089.38	7/1/2009	to	6/30/2010	Complete
PY10 (GTC)	\$ 997,930.00	215	\$4,641.53	\$807,190.00	226	\$3,571.64	7/1/2010	to	6/30/2011	Complete
PY11 (GTC)	\$ 1,110,412.00	198	\$5,608.14	\$925,874.00	220	\$4,208.52	7/1/2011	to	6/30/2012	Complete
<i>Note: De-obligated \$30,001.95</i>										
PY12	\$ 850,000.00	155	\$5,483.87	\$770,057.14	171	\$4,503.26	7/1/2012	to	6/30/2013	Complete
PY13	\$ 839,929.00	175	\$4,799.59	\$605,384.00	160	\$3,783.65	7/1/2013	to	4/27/2014	In Progress

b) Services Provided

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

ii) Services

(1) Summary of Services Provided

(a) Outreach & Recruitment

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

(b) Assessments

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

(c) WIA Eligibility Determination

(d) WIA Program Enrollment

(e) Individual Employment Plan or Service Strategy Development

(f) One-on-One Career Counseling and Coaching

(g) Required Reporting in SC WOS (State Reporting System)

(h) Monthly Monitoring of Records

(i) Monthly Programmatic & Fiscal Reports

(j) Career Smart (Employability Workshops) including:

(i) NIOSH Safety

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

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

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

ATTACHMENT A

STAFF TIME & WIA FEDERAL REGULATIONS & REQUIREMENTS

- a) Services Provided
- i) Henkels & McCoy, Inc. has been contracted to provide the following services as outlined in the Contract Statement of Work along with a description of time it takes to provide these services to meet and exceed the establish Federal Performance Measures.
 - ii) Services
 - (1) Summary of Services Provided
 - (a) Outreach & Recruitment
 - (i) Orientations, Community Presentations, Coordination with Adult Education & K-12
 - (b) Assessments
 - (i) TABE (Reading & Math Assessment)
 - (ii) SCOIS (Interest Inventory)
 - (iii) Aptitude Testing (as needed)
 - (iv) WorkKeys (For those who enroll)
 - (c) WIA Eligibility Determination
 - (d) WIA Program Enrollment
 - (e) Individual Employment Plan or Service Strategy Development
 - (f) One-on-One Career Counseling and Coaching
 - (g) Required Reporting in SC WOS (State Reporting System)
 - (h) Monthly Monitoring of Records
 - (i) Monthly Programmatic & Fiscal Reports
 - (j) Career Smart (Employability Workshops) including;
 - (i) NIOSH Safety
 - (ii) Expungement Clinics
 - (iii) Financial Literacy
 - (iv) Parenting Classes
 - (k) Mentoring
 - (l) Supportive Services for Transportation, Childcare, and Emergency Assistance
 - (m) Work Experience (Paid & Unpaid)
 - (n) Placement into Employment, Military, and/or Post-Secondary Education
 - (o) 12 Months of Follow-up
 - (2) Outreach & Recruitment (Makes up at least 25% of Staff Time Weekly – 10 Hours Weekly)
 - (a) H&M is required to provide outreach and recruitment services in order to meet and exceed the enrollment goals set forth in the contract. Over our many years of experience we have found that our staff needs to reach out to at least 100 Youth to find 15 – 20 that they will enroll who they deem suitable and able to complete the goals of the program. As part of this process is federally legislated that we focus on serving those participants who are most in need, meaning they have multiple barriers as outlined in the Federal Regulations and the primary barrier is High School Dropout and basic Skills Deficiencies.
 - (i) To be eligible for services under Title I of the Workforce Investment Act for youth, an individual must meet the following definition.
 1. An eligible youth is defined as:
 - a. An individual who is not less than age 14 and not more than age 21; and
 - b. Is a low income individual, and
 - c. Is an individual who has one or more of the following barriers:
 - d. Deficient in basic literacy skills
 - e. A school dropout
 - f. Homeless, a runaway, or a foster child

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- g. Pregnant or a parent
 - h. And offender
 - i. An individual who requires additional assistance to complete an educational program, or to secure and hold employment, or lacks reliable transportation, or is in need of work-readiness skills.
- (ii) The following definitions apply to the above eligibility criterion:
- 1. Low-Income individual is defined as:
 - a. An individual who receives, or is a member of a family that receives, cash payments under a Federal, State, or local income based public assistance program;
 - b. An individual who received an income, or is a member of a family that received a total family income, for the 6-month period prior to application for the program involved (exclusive of unemployment compensation, child support payments, payments described in subparagraph (A), and old-age and survivors insurance benefits received under Section 202 of the Social Security Act (42 U.S.C. 402) that , in relation to family size, does not exceed the higher of –
 - i. the poverty line, for an equivalent period; or
 - ii. 70 percent of the lower living standard income level, for an equivalents period;
 - c. An individual who is a member of household that receives (or has been determined within the 6-month period prior to application for the program involved to be eligible to receive) food stamps pursuant to the Food Stamp Act of 1977 (7 U.S.C. 2011 et seq.);
 - d. An individual who qualifies as a homeless individual, as defined in subsections (a) and (c) of Section 103 of the Steward B. McKinney Homeless Assistance Act (42 U.S. C. 11302);
 - e. An individual who is a foster child on behalf of whom State or local government payments are made; or
 - f. In cases permitted by regulations promulgated by the Secretary of Labor, is an individual with a disability whose own income meets the requirements of a program described in subparagraph (A) or of subparagraph (B), but who is a member of a family whose income does not meet such requirements.
- (iii) Deficient in Basic Literacy Skills is defined as:
- 1. An individual who is determined to compute or solve problems, read, write, or speak English at or below grade level 8.9; or
 - 2. An individual who is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society.
- (iv) School dropout is defined as:
- 1. An individual who is no longer attending any school and who has not received a secondary school diploma or it has recognized equivalent.
- (v) Offender is defined as:
- 1. Any adult or juvenile-
 - a. who is or has been subject to any stage of the criminal justice process, for whom services under this ACT may be beneficial; or
 - b. who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.
- (vi) Individual who requires additional assistance to complete an educational program, or to secure and hold employment is defined as:
- a. This definition is the Youth Plan Section of the Local Plan.

- (vii) Out of School Youth is defined as:
 - a. An eligible youth who is a school dropout, or
 - b. An eligible youth who has received a secondary school diploma or its equivalent but is basic skills deficient, unemployment and under-employed.
- (3) WIA Eligibility Determination, Certification, Assessment, Plan Development, & Enrollment (Makes up at least 15% of Staff Time Weekly – 6 Hours Weekly)
 - (a) Every participant that applies for WIA services must be scheduled for a Certification and Eligibility Appointment to meet one-on-one with staff. These appointments generally take 2 hours, if the individual has all of their documentation. During this meeting staff goes through the WIA Application and determines WIA Eligibility in SC WOS (state reporting system). WIA Suitability is assessed and the Objective Assessment determines what needs the participant has that will make up their Individual Employment Plan (IEP) or Individual Service Strategy (ISS). Our students have multiple barriers as mentioned above. It is staff's job at this phase to identify all of the barriers so that we may address them for each individual.
 - (i) Assessments
 - 1. Prior to the appointment applicants for services are referred to Adult Education to take the Test for Adult Basic Education (TABE) to determine if they are Basic Skills Deficient or not as define above.
 - 2. Prior to the appointment applicants are also asked to complete the SCOIS Interest Inventory to determine what their occupational interests are to facilitate developing a plan.
 - (ii) Enrollment & Plan Development
 - 1. If the Participant is deemed eligible and suitable for the program the Career Coach proceeds with enrollment. The Enrollment process takes another 1-2 hours of time depending on the individual's needs.
 - a. If someone is not eligible, not suitable, or not interested staff offer to refer them to other community services based on their needs.
- (4) WIA Youth 10 Elements from the Regulations
 - (a) § 664.410 Must local programs include each of the ten program elements listed in WIA section 129(c)(2) as options available to youth participants?
 - (i) Yes, local programs must make the following services available to youth participants:
 - 1. Tutoring, study skills training, and instruction leading to secondary school completion, including dropout prevention strategies;
 - 2. Alternative secondary school offerings;
 - 3. Summer employment opportunities directly linked to academic and occupational learning;
 - 4. Paid and unpaid work experiences, including internships and job shadowing, as provided in §§ 664.460 and 664.470;
 - 5. Occupational skill training;
 - 6. Leadership development opportunities, which include community service and peer-centered activities encouraging responsibility and other positive social behaviors;
 - 7. Supportive services, which may include the services listed in § 664.440;
 - 8. Adult mentoring for a duration of at least twelve (12) months, that may occur both during and after program participation;
 - 9. Follow-up services, as provided in § 664.450; and
 - 10. Comprehensive guidance and counseling, including drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth.

- a. Local programs have the discretion to determine what specific program services will be provided to a youth participant, based on each participant's objective assessment and individual service strategy. (WIA sec. 129(c)(2).)
 - (b) Henkels & McCoy, Inc. provides all of the Ten Elements listed above as part of our program based on each individual's needs as assessed by the Career Coach during the course of the program.
- (5) Active Participant Case Management, Training Services, & Reporting (Makes up at least 40% of Staff Time Weekly – 16 Hours Weekly)
 - (a) H&M is required to provide holistic case a management to every participant served. In order to successfully serve at-risk out-of-school youth the Career Coach has to meet with the participant multiple times during the month. We have strategically placed our Career Coaches in the Adult Education Centers as most of our participants are high School Dropouts and need to attain their GED or High School Diploma. This allows the Career Coach to monitor their participants weekly, if not daily.
 - (b) H&M Staff is required to do a significant amount of administrative tracking to verify all of the services being provided. Everything is tracked in the state reporting system and items that cannot be tracked there are tracked through proprietary software that H&M provides. Career Coaches enter detailed case notes on each participant, they meet monthly to review their IEP or ISS to ensure they are on track, they track weekly training attendance, they write vouchers for Occupational Skills Training, and they write vouchers for Transportation and Childcare as needed.
 - (c) Training Services are provided based on each individual's needs and goals as outlined in their IEP or ISS. Short Term Occupational Skills Training is provided through Vouchers given to the participant for training at eligible training providers as certified by the state and local WIB. A variety of training is offered and must be with in the pre-determined Occupational Clusters as approved by the WorkLink WIB. Participants are all required to attend our Career Smart Employability Skills Training that includes, NIOSH Safety Course, Financial Literacy, Job Applications, Resume Writing, Interviewing Techniques, Work Attitudes & Dress, Expungement Clinics, FAFSA Workshops and more. Staff provides Basic Skills Tutoring access to our participants utilizing Skills Tutor Software provided by H&M. Staff sets up Mentoring services for participants as needed through a partnership with Ripple of One. Parenting classes are offered to those pregnant and parenting teens being served. There are many more services offered through community collaboration by a referral process to get each participant to the right service as needs arise. Staff strongly encourage our youth to look at 2 year degree programs as they all qualify for Pell and Lottery funding.
 - (d) H&M Management report out monthly to the WorkLink WIB Staff and the Youth Council and provide a Performance Dashboard Report as well as a Budget versus Actual on year to date expenditures.
- (6) Placement in Employment and/or Post-Secondary & 12 Month Follow-up (Makes up at least 20% of Staff Time Weekly – 8 Hours Weekly)
 - (a) Our Career Coaches and Workforce Specialists work together to identify employment opportunities for our participants that are going to go directly into employment out of the program. Most of the youth we serve have little to no work experience and we utilize Work experience initiatives to provide that experience with local areas businesses and have done so successfully. Many are interested in going on to Post-Secondary and do enroll in 2 year programs or on part-time basis. Unfortunately the many of the youth we serve do not have type of family support mechanisms and need to work even if they go to school fulltime. We facilitate both needs and desires by assisting them with employment while helping them enroll in post-secondary education. The outcomes collected in SC WOS often show up as Employment because their wages hit before we can record the

entry into Post-Secondary Education so the placement reports may reflect lower level employment, but what is missing is their enrollment into post-secondary education.

- (b) The Career Coaches provide 12 months of monthly follow-up services to each participant enrolled in the program and assist them with barriers and challenges that may occur during this time. Often times we assist in finding more than one employment opportunity for our youth after they exit the program.

ATTACHMENT B

PROGRAM PERFORMANCE SUMMARY

WorkLink Youth Performance Summary
PY10, PY11, PY12, & PY13 (YTD)

Literacy & Numeracy

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	45.00%	67.00%	Exceeded	7/1/10 to 6/30/11	Number enrolled one year prior that are basic skills deficient
PY11	45.00%	69.00%	Exceeded	7/1/11 to 6/30/12	
PY12	67.30%	62.50%	Met	7/1/12 to 6/30/13	FINAL
PY13	65.30%	65.80%	Exceeded	1/1/13 to 12/31/13	Thru 2nd Qtr

Calculation & Definition

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

Number who completed a year of participation

+

Number who exit before completing a year of participation

Credential Attainment

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	55.00%	73.00%	Exceeded	10/1/09 to 9/30/10	
PY11	55.00%	62.00%	Exceeded	10/1/10 to 9/30/11	
PY12	77.70%	78.99%	Exceeded	10/1/11 to 9/30/12	FINAL
PY13	77.70%	81.30%	Exceeded	4/1/12 to 3/31/13	Thru 2nd Qtr (Rolling 4 Qtrs)

Calculation & Definition

Of those enrolled in education at participation or any time during the program:
Number attaining a diploma, GED or certificate by the end of the 3rd quarter after exit
Number of exiters

Program Year	GED	HS Diploma	Occupational Skills Credentials	Total	Notes
PY10	61	25	28	114	
PY11	81	11	27	119	
PY12	83	15	11	109	
PY13	77	6	5	88	Actual Total is 104 of 128, but we can only verify the detail on 88 at present, due to lags in Federal Reporting
Total	302	57	71	430	

NOTE: In PY12 14 Participants that received a GED or HS Diploma also received an Occupational Skills Credential.

Placement in Employment and/or Post-Secondary

Program Year	Annual Goal	Perf %	Failed, Met, or Exceeded	Federal Reporting Dates	Notes
PY10	61.00%	72.00%	Exceeded	10/1/09 to 9/30/10	
PY11	61.00%	76.00%	Exceeded	10/1/10 to 9/30/11	
PY12	67.30%	81.08%	Exceeded	10/1/11 to 9/30/12	FINAL
PY13	75.30%	87.50%	Exceeded	4/1/12 to 3/31/13	Thru 2nd Qtr (Rolling 4 Qtrs)

Calculation & Definition

Of those who are not in any of the following at date of participation - post-secondary education, employment, or the military:
Number of participants in employment or the military or enrolled in post-secondary education and/or advanced training/occupational skills training in the quarter after exit
Number of exiters

Program Year	Placed	Counted in Measure	Perf %	Notes
PY10	63	88	72%	20 Post Secondary
PY11	87	114	76%	9 Post Secondary
PY12	109	138	79%	5 Post Secondary
PY13	75	86	87.21%	8 Post Secondary
TOTAL	334	426		Actual Total is 91 of 104, but we can only verify the detail on 86 at present, due to lags in Federal Reporting