



Upstate Workforce Board Meeting Minutes
March 19, 2018 - 8:30 a.m.
Spartanburg Marriott Hotel

Board Members Present

Mr. Wade Ballard
Mr. Bill Brasington
Mr. Jay Coffey
Mr. Jim Cook
Mr. Chuck Ewart
Mr. Robert Faucett
Mr. Wayne Gregory
Ms. Elizabeth Guzzo
Ms. Lisa Hannon
Mr. Craig Jacobs
Dr. Brian Nottingham
Ms. Cherie Pressley
Ms. Jennie Thomas

Board Members Absent

Mr. Curtis Anderson
Mr. Shelley Blount
Mr. Ryan Childers
Mr. Evander Thomas
Ms. Mari Van Fossen
Mr. David Wall

UWB Staff Present

Ms. Ann Angermeier
Mr. Brent Bishop
Ms. Alice Lang
Ms. Vicki Lawson
Ms. Simone Mack-Orr
Ms. Dana Wood

Guests Present

Mr. Brian Alston
Ms. Kathy Bell
Ms. Rochelle Brown
Mr. Taylor Brown
Ms. Johnnie Lynn Crosby
Ms. Michelle Hawkins
Mr. Deivis Henao
Mr. Sam Hook
Ms. Helen Merriweather
Mr. Warren Snead
Mr. Brad Williams

Welcome

Mr. Robbie Faucett, Vice-Chairman, called the meeting to order at 8:29 a.m. Mr. Faucett welcomed guests Mr. Warren Snead from the State Workforce Board and Mr. Brad Williams from ResCare.

Approval of Meeting Minutes

The minutes of the January 22, 2018 meeting were reviewed. *Mr. Wayne Gregory made a motion to accept the minutes as written. Ms. Betty Guzzo seconded the motion. There were no abstentions and the motion carried.*

Digital Micro-targeting Campaign Update by Mr. Taylor Brown

Mr. Taylor Brown, Director of Digital Marketing of The Palladian Group, gave a campaign update of the digital micro-targeting project they are running for the Upstate Workforce Board (UWB). He said his update is based on one month of data collected since the campaign began. Mr. Brown said they have been tracking what people did once they saw our advertisements. He has identified job seekers outside the

area who would be willing to relocate here and also targeted students at local technical and career technology schools. The campaign has been reaching not just people who are unemployed but those who are actively seeking work. He is advertising two large fields of work, Construction and Manufacturing, which represent a lot of available jobs in our area. Using Google analytics, he is able to obtain data based on browsing and search patterns, and then set up a conversion oriented landing pad with information about local employers and the UWB. Our advertisements are showing up on desktop computers, mobile devices and websites. They are actually following individuals to see what websites they follow.

We are now 1 and ½ months into the campaign and already there is data to show that the ads are working. So far, we have had 613,000 targeted ad displays which is 5 times the average national interaction rate. We have been averaging about 40 cents per click which is dipping as we get more efficient. It costs only two dollars to display one thousand ads. The traffic on the UWB website shows that we are converting browsers to click on and look at the page. Since the campaign began, there has been a 30% increase in the number of website users of the UWB site. This includes a 28% increase in new users. Demographics of the ads show that people ages 25 to 34 represent the largest group who are engaged and 59% of those clicking on ads are female. The UWB ads have reached all but five US states. The next step will be to continue to optimize the ad creatives and see which ads work best. If the campaign seems not to be working in one region, we can switch to another area. We can also use the campaign to advertise specific programmatic events such as the SC Works Annual Job Fair. Ms. Dana Wood pointed out that we can change the ads within a 30 minute time span. She said we are trying to promote an “Earn While You Learn” program and are getting people to fill out contact forms. We have gotten interaction from people in Louisiana, North Carolina and Virginia for this particular campaign.

Executive Committee Report

Mr. Robbie Faucett, Executive Committee member, reported on behalf of the Executive Committee. The committee met on February 26, 2018. Mr. Faucett reported that Mr. Brent Bishop presented the financials through December 2017. He also said that Ms. Ann Angermeier introduced a Manufacturing Program Idea which she will present later in this meeting.

The Executive Committee recommends that the Upstate Workforce Board approve the Transitional Jobs Policy and give staff permission to modify the wages based on self-sufficiency discussion later in the meeting. Mr. Faucett asked Ms. Dana Wood to give a brief overview of the Transitional Jobs Policy. Ms. Wood explained that this policy was written to help the chronically unemployed and those with an inconsistent work history to gain job experience. It gives staff direction about employee and employer eligibility for the transitional jobs program. **The Board voted unanimously to approve the Transitional Jobs Policy and give staff permission to modify the wages based on self-sufficiency discussion later in the meeting. There were no abstentions.**

One Stop Committee Report

Mr. Craig Jacobs, One Stop Committee Chair, reported on behalf of the One Stop Committee. The committee met on February 20, 2018. Mr. Jacobs reported that there are 3 items upon which to vote and one item for discussion.

The One Stop Committee recommends that the Upstate Workforce Board approve the ETPL policy as written. Mr. Jacobs explained that the State has an approved list of training providers, but our local area wants to be sure we have guidelines in place, including requiring providers to have been in business for at least two years and to show data for their performance. However, the One Stop Committee will have the flexibility to approve providers that do not meet all the requirements if properly justified. **The Board voted unanimously to approve the ETPL policy as written. There were no abstentions.**

The One Stop Committee recommends that the Upstate Workforce Board approve the revised IWT policy as written. Mr. Jacobs explained that in the past, if you had a company in Cherokee and Union counties, businesses or employers had to turn in their IWT proposal to the SC Works Spartanburg office. Under the proposed revised IWT policy, the companies in Cherokee and Union can turn in their IWT proposals to their local SC Works offices. The revisions also contain some tweaking to the scoring process used by the committees to award funding. **The Board voted unanimously to approve the revised IWT policy as written. There were no abstentions.**

The One Stop Committee recommends that the Upstate Workforce Board approve the Board staff to continue the conversations and move forward with re-location of SC Works Union. Mr. Jacobs said that the Carnegie Library in Union will be a better location for the SC Works, with minimal rent and more traffic due to its location. Ms. Angermeier said the other benefit is that the SC Works Union office will be allowed to open on Fridays once the move takes place. **The Board voted unanimously to approve the Board staff to continue the conversations and move forward with re-location of SC Works Union. There were no abstentions.**

Mr. Jacobs then led the Board into a discussion about whether they should maintain or reset the self-sufficiency wage, which is applicable to the training and employment placements in our local area. He said the One Stop Committee had no recommendations in this regard. Ms. Ann Angermeier said that in some CNA programs, they are not averaging \$12.00 per hour because in places like Union, if you hold to the \$12.00 per hour wage, you are limiting opportunities for some job trainees. Ms. Johnnie-Lynn Crosby said that her biggest concern is for On-the-job training because in Union and Cherokee, raising the self-sufficiency wage above \$12.00 per hour would knock them out of contention for OJT opportunities. She noted that Spartanburg County generally pays higher wages than Cherokee or Union. She said that by using stackable credentials, they can help people start out at \$12.00 per hour and then move to a higher wage. Mr. Jay Coffey agreed. He said that in the Michelin Tech Scholar program, they pay \$12.00 per hour. After a fruitful discussion, Mr. Jacobs said there was a consensus among Board members that we do not need to raise the self-sufficiency wage above \$12.00 per hour at this time.

Youth Committee Report

Mr. Bill Brasington, Committee Member, reported for the Youth Committee. The committee met on February 7, 2018. He said that the ACHIEVE and YouthStop programs are doing well. Brent Bishop reported on the financials for both programs. The Youth RFPs are being sent out. They are due on March 27th. The committee spent some time discussing the focus of the committee. **The Youth Committee recommends that the Upstate Workforce Board approve the ACHIEVE budget modifications as written.** Mr. Brasington explained that this was a request for line item shifts and the allocation of

unobligated funds in the amount of \$2,368.75. **The Board voted unanimously to approve the ACHIEVE budget modifications as written. There were no abstentions.**

Disabilities Committee Report

Ms. Jennie Thomas, Disabilities Committee Chair, reported on behalf of the Disabilities Committee. The committee met on February 22, 2018. She said that they discussed the recent ADA Facility Review Reports by ABLE SC. There were some issues at each Upstate Workforce Board location. Ms. Dana Wood reported that some of the problems involved ramps, slopes and parking lots. Ms. Thomas said that the committee discussed the May 11th Disabilities luncheon which will take place at SCC Middle Tyger campus. Lunch will be paid for by the Upstate Workforce Board. They still need a business to donate \$250.00 to pay for the moderator's honorarium. This annual event has become the focus of this committee. Ms. Angermeier asked Ms. Wood to invite people from the other local workforce boards to attend. She also asked the Board members to let the committee know of any companies which might be interested in participating this year. Ms. Wood said that last year 80 to 85 people showed up for the event. The room holds up to 110 people, so there is room for more to attend.

Executive Director Update

Ms. Ann Angermeier, Executive Director, introduced the Upstate PY17 WIOA Performance Goals to the Board. Ms. Angermeier said that we do not have the PY16 performance information because we never received it from the State. We have had to function without it and are completing our Annual Report Calendars without this information. Ms. Angermeier said she was presenting the second quarter of PY17 performance. All of the performance measures from the One Stop centers are being met. One of our youth programs made a mistake in one of the Youth performance measures, but we identified the errors and the results now show that we met the requirements for the Youth programs. Board staff informed DEW of the mistake and requested a re-run of the report.

Ms. Angermeier then presented a Manufacturing Program Idea link at <https://charlottesbackyardnc.com>. She said she attended an Economic Development Conference last month and learned about the Charlotte's Backyard program. Just like us, the Shelby, NC area is having trouble finding enough workers in the manufacturing fields. They raised \$40,000 from local manufacturers and added \$90,000 of their own for an advertising program by Little Bird Marketing who used millennials to help design the site. She sent the link to BMW and Michelin and they really liked the concept. She also sent the link to Allen Smith of the Spartanburg Area Chamber of Commerce. He was very interested and stated he had resources and wanted to discuss the idea in more detail. Ms. Angermeier said she would keep the Board posted on this project as she believes we could replicate the idea.

Adjournment

With no other business or discussion, the meeting was adjourned at 9:32 a.m.

Next meeting date: May 21, 2018

Upstate Workforce Board Meeting
March 19, 2018 at 8:30 a.m.
Spartanburg Marriott Hotel

8:30 AM

- Welcome Mr. Robbie Faucett, Vice-Chair
- *Approval of the January 22, 2018 Meeting Minutes

8:35 AM

- Digital Micro-targeting Campaign Update Mr. Taylor Brown
The Palladian Group

8:45 AM

- Executive Committee Report Mr. Robbie Faucett, Committee Member
 - *Transitional Jobs Policy

8:50 AM

- One Stop Committee Report Mr. Craig Jacobs, Chair
 - *Self Sufficiency wage discussion with full board
 - *Eligible Training Provider List Instruction Letter
 - *Incumbent Worker Training Instruction Letter Revision
 - *Re-location of SC Works Union

9: 00 AM

- Youth Committee Report Mr. Bill Brasington, Committee Member
 - *Grant Modification for ACHIEVE program

9:05 AM

- Disabilities Committee Report Ms. Jennie Thomas, Chair

9:10 AM

- Executive Director Update Ms. Ann Angermeier, Executive Director
 - Upstate PY 17 WIOA Performance Goals
 - Presentation about Manufacturing Program Idea

9:20 AM

- Other Business and Adjourn

**Action Required*

Next meeting: May 21, 2018 at 8:30 a.m.

Mission Statement: Advancing the Future of Business and Community



Upstate Workforce Board Meeting Minutes
January 22, 2018 - 8:30 a.m.
Spartanburg Marriott Hotel

Board Members Present

Mr. Wade Ballard
Mr. Shelley Blount
Mr. Bill Brasington
Mr. Jay Coffey
Mr. Robert Faucett
Mr. Wayne Gregory
Ms. Elizabeth Guzzo
Ms. Lisa Hannon
Mr. Craig Jacobs
Dr. Brian Nottingham
Ms. Cherie Pressley
Mr. Carter Smith
Ms. Jennie Thomas
Ms. Marianne Van Fossen
Mr. David Wall

Board Members Absent

Mr. Curtis Anderson
Mr. Ryan Childers
Mr. Jim Cook
Mr. Chuck Ewart
Ms. Martha Young

UWB Staff Present

Ms. Ann Angermeier
Mr. Brent Bishop
Ms. Alice Lang
Ms. Vicki Lawson
Ms. Dana Wood

Guests Present

Ms. Kathy Bell
Ms. Jennifer Cudd
Mr. Isaac Dickson
Ms. Michelle Hawkins
Ms. Tammie Hoy Hawkins
Ms. Helen Merriweather
Mr. Doug Stephenson
Mr. Kenneth Taylor

Welcome

Mr. Craig Jacobs, Chair of the One Stop Committee, called the meeting to order at 8:36 a.m. Mr. Jacobs asked Mr. Doug Stephenson and Ms. Ann Angermeier to make the presentation of the Star of SC Works Upstate PY16 Award to Kenneth Taylor of SC Works. Mr. Stephenson gave examples of Mr. Taylor's achievements and great work ethic. He received applause from the Board members.

Approval of Meeting Minutes

The minutes of the November 20, 2017 meeting were reviewed. ***Mr. David Wall made a motion to accept the minutes as written. Mr. Wayne Gregory seconded the motion. There were no abstentions and the motion carried.***

Special Guest Speaker Tammie Hoy Hawkins

Ms. Tammie Hoy Hawkins, Project Manager for the Northside Development Group (NDG), gave a PowerPoint presentation about the achievements and on-going projects of this non-profit organization. The project is a 400 acre redevelopment area. Sixty percent of the residents live in poverty and forty percent are unemployed. NDG is focused on transforming the neighborhood through 4 goals: 1) Creating mixed income development; 2) Improving the neighborhood; 3) Educating residents from cradle to

career; and 4) Providing quality supportive services. In order to achieve this, NDB is a) tearing down derelict building; b) renovating old properties; and c) creating new buildings in partnerships with the Spartanburg Housing Authority and Homes of Hope.

Some of the new projects being planned include: 1) a 90-unit, mixed income housing development which is a 15 million dollar project where the rents will range from \$550 to \$1,000; and 2) An 11 million dollar mixed use building which will house apartments for Wofford students, a clinic for VCOM Carolinas campus, offices for Access Health, and a new headquarters for the NDG. This is being financed by tax credits from bond financing and new market tax credits.

Other developments in the Northside Area include the new Dr. T.K. Gregg community center (a 16 million dollar project) and The Franklin School, an early learning center for children age 6 weeks to 5 years (a 12 million dollar project). As a way to improve education levels in the Northside, any resident there is able to attend SCC with free tuition. Additionally, NDG is sponsoring a Start Me program to train and mentor new entrepreneurs in the Northside area. Ms. Hoy Hawkins invited Board members and staff to call her office and schedule a tour of the NDG projects.

One Stop Committee Report

Mr. Craig Jacobs, One Stop Committee Chair, reported on behalf of the One Stop Committee. The committee met on December 5, 2017. Mr. Jacobs reported that the committee heard a report from Ms. Dana Wood about monitoring which had positive feedback overall and staff were told there were no disallowed costs. Mr. Jacobs said that the committee and the board had recently approved 10 companies for IWT funding. There is more money to be obligated for IWT. The second solicitation ended last week. The committee plans to have a conference call tomorrow to make recommendations on additional IWT funds. Board staff will then send out a poll vote to the full board.

Ms. Ann Angermeier reported that there is a new State Instruction Letter that stipulates that at least 30% has to be spent on training. However, this means that workforce boards will no longer seek non-WIOA money in the form of grants for training because this money cannot count towards the 30%. This ruling also places us on hold in seeking partner funding for training as it would also count against us. Ms. Angermeier said she wished the State Workforce Board members would simply ask local directors how the DEW decisions handed to them for approval affect local areas. State staff may not fully understand the consequences their decisions have on the local level. Policies like these run counter to using outside sources to stretch our dollars.

The One Stop Committee recommends that the Upstate Workforce Board obligate an additional \$50,000 to ResCare for training and supportive services. Some questions were asked about this money. Mr. Brent Bishop explained that it is unobligated, carryover money, representing \$40,000 Adult money and \$10,000 Dislocated Worker funds. He said we still have funds in the reserve. **The Board voted unanimously to obligate an additional \$50,000 to ResCare for training and supportive services.**

Youth Committee Report

Mr. Bill Brasington, Committee Member, reported for the Youth Committee. The committee met on December 6, 2017. He said that the ACHIEVE and YouthStop budgets reflected information received for the month of October 2017. Both programs are on track with spending. He said that there were no items requiring action from the Board.

Disabilities Committee Report

Ms. Jennie Thomas, Disabilities Committee Chair, reported on behalf of the Disabilities Committee. The committee met on December 14, 2017. At the meeting, they talked about the ADA compliance evaluation being done by Able SC. The results of the evaluation will be shared with the committee upon receipt of the report. Next year's event, with a theme of Invisible Disabilities, will be held on May 11th at SCC Tyger River Campus. Mr. Chuck Ewart will serve as the moderator. The event will be open to the Board members. The committee will pursue getting SHRM credits for attendees.

Executive Director Update

Ms. Ann Angermeier, Executive Director, introduced two guests at the meeting: Mr. Isaac Dickson and Ms. Jennifer Cudd. She noted that Dr. Brian Nottingham is now officially a Board member. She reported that staff member Ms. Simone Mack-Orr gave birth to a baby boy. She also reported that Mr. Curtis Anderson, the Chairman, was unable to attend today's meeting due to a meeting at work at which his attendance was required.

Ms. Angermeier gave an update on the MDC program whose goal is to help disconnected youth, age 16-24, who live in the deepest poverty in Spartanburg County. They are encouraged by the THREAD program whose goal is to help kids no matter at what age you reach them.

Other Business

Ms. Dana Wood reported that staff are working with SCC regarding being on the Eligible Training Provider List. The college has concerns about the confidentiality of records of their students with the SC Department of Employment and Workforce's recent requirement that social security numbers be provided for any student enrolled in a class with a WIOA student. Ms. Mary Jo Schmick of SCDEW has sent an email to SCC asking them to continue working with us until October 2018.

Adjournment

With no other business or discussion, the meeting was adjourned at 9:24 a.m.

Next meeting date: March 19, 2018

**UPSTATE WORKFORCE BOARD
EXECUTIVE COMMITTEE MEETING
Committee Summary**

| | |
|--|---|
| Meeting Date | February 26, 2018 at 8:30 a.m. |
| Contact for Questions and Concerns | Mr. Curtis Anderson - 864.205.9824 Email: cnanderson1984@gmail.com Ms. Ann Angermeier – 864.596.2028, ext. 104 Email : angermeier@upstaterworkforceboard.org |
| Significant Items and Issues Raised | <ul style="list-style-type: none"> • WB Office Budget (through December 2017) • Policies and Instruction Letter Review <ul style="list-style-type: none"> ○ Transitional Jobs Policy ○ Identity Theft Policy update |
| Action Taken | Motion to approve Transitional Jobs Policy. |
| Results and Outcomes | <p><u>WB Office Budget (through December 2017)</u> Mr. Brent Bishop, CFO, presented the financials through December 2017. He said this represents the half-way point in the program year. We may have to modify a few items before the end of the fiscal year.</p> <p><u>Manufacturing Program Idea</u> Ms. Ann Angermeier introduced a website (https://charlottesbackyardnc.net) to the committee members. It is a program launched by Cleveland County, North Carolina to attract millennial employees in the manufacturing field. A steering committee of local millennials helped to design the website. Ms. Angermeier has emailed key community leaders to seek interest for a project similar to this one for our area.</p> <p><u>Policies and Instruction Letters Review</u> Ms. Dana Wood presented the Transitional Jobs Policy in a more final draft. Ms. Wood asked the committee to establish at what rate the policy should set a wage for the transitional jobs. It was discussed that \$12.00 per hour is the Board's established self-sufficiency wage. Mr. Wade Ballard made a motion to present the Transitional Jobs Policy to the Board for its approval, pending the setting of the hourly rate. Mr. Robbie Faucett seconded the motion. The motion was carried unanimously with no abstentions. Ms. Ann Angermeier gave an update on the Identity Theft Policy. She said she is amending certain sections of the draft and she will have a final draft ready to present at the next committee meeting.</p> <p><u>Geofencing Update</u> Ms. Dana Wood reported that the Palladian Group will be sending a representative to the March 19th Board meeting to give us an update on the data derived so far from this project.</p> <p><u>Other Business</u> In other business, Chairman Curtis Anderson said that he will be unable to attend the next Board meeting. He asked Vice-Chairman Robbie Faucett to fill in for him and Mr. Faucett agreed to fulfill this task.</p> |
| Items Referred for Board Action | The Committee recommends the full board approve of the Transitional Jobs Policy pending the setting of the local self-sufficient hourly rate. |
| Website Reference | www.upstaterworkforceboard.org |



Advancing the Future of Business and Community
upstatewib.org

AGENDA

EXECUTIVE COMMITTEE MEETING

February 26, 2018

8:30 a.m.

Ford & Harrison LLP.

- Welcome Mr. Curtis Anderson
- Financials *(ending December 2017)* Mr. Brent Bishop
- Manufacturing Program Idea Ms. Ann Angermeier
- Policies & Instruction Letters Review Ms. Ann Angermeier
 - Transitional Jobs Policy
 - Job fairs for out-of-county employers
- Geo-fencing Update Ms. Dana Wood
- Other Business & Adjourn Ms. Ann Angermeier

Next Meeting Date: April 30, 2018

*Our Mission Statement:
Advancing the Future of Business and Community*

Upstate Workforce Board

Profit & Loss Budget vs. Actual

July through December 2017

UWB Office

50% of PY17

| | Jul - Dec 17 | Budget | \$ Over Budget | % of Budget |
|-----------------------------------|--------------|------------|----------------|-------------|
| Ordinary Income/Expense | | | | |
| Income | | | | |
| Grants Received | 624,739.00 | 624,739.00 | 0.00 | 100.0% |
| Total Income | 624,739.00 | 624,739.00 | 0.00 | 100.0% |
| Gross Profit | 624,739.00 | 624,739.00 | 0.00 | 100.0% |
| Expense | | | | |
| 91010 · Salaries | 127,783.43 | 272,222.00 | -144,438.57 | 46.94% |
| 91510 · FICA | 9,208.03 | 20,443.00 | -11,234.97 | 45.04% |
| 91520 · State Retirement | 14,811.54 | 32,227.00 | -17,415.46 | 45.96% |
| 91540 · Insurance | 19,025.10 | 38,050.00 | -19,024.90 | 50.0% |
| 91550 · Workers Compensation | 325.50 | 576.00 | -250.50 | 56.51% |
| 92004 · Dues and Publications | 1,579.20 | 7,100.00 | -5,520.80 | 22.24% |
| 92500 · Mileage | 1,334.86 | 4,628.00 | -3,293.14 | 28.84% |
| 92510 · Professional Development | 5,507.97 | 18,111.00 | -12,603.03 | 30.41% |
| 92700 · Office Supplies | 3,429.88 | 9,412.00 | -5,982.12 | 36.44% |
| 92704 · Copier | 1,278.70 | 6,366.00 | -5,087.30 | 20.09% |
| 92705 · Outreach | 721.97 | 34,500.00 | -33,778.03 | 2.09% |
| 93121 · Printing | 183.18 | 3,000.00 | -2,816.82 | 6.11% |
| 93145 · Postage and Delivery | 52.90 | 510.00 | -457.10 | 10.37% |
| 93297 · Leases & Rentals | 3,724.90 | 8,100.00 | -4,375.10 | 45.99% |
| 93300 · Rent Expense | 17,007.90 | 40,819.00 | -23,811.10 | 41.67% |
| 93452 · Consulting/Contracts | 22,188.20 | 70,211.00 | -48,022.80 | 31.6% |
| 93500 · Vehicle Manpower/Overhead | 68.74 | 1,600.00 | -1,531.26 | 4.3% |
| 93501 · Vehicle Parts | 25.69 | 1,546.00 | -1,520.31 | 1.66% |
| 93502 · Vehicle - Fuel, Oil, Lub | 206.56 | 2,100.00 | -1,893.44 | 9.84% |
| 93600 · Telephone Expense | 2,731.16 | 6,163.00 | -3,431.84 | 44.32% |
| 95000 · Miscellaneous Expense | 1,141.85 | 2,401.00 | -1,259.15 | 47.56% |
| 95001 · Indirect Costs | 15,027.31 | 36,352.00 | -21,324.69 | 41.34% |
| 97000 · Special Projects | 1,308.00 | 5,933.00 | -4,625.00 | 22.05% |
| 99308 · Computer and Software | 175.31 | 2,249.00 | -2,073.69 | 7.8% |
| 99680 · Miscellaneous Equipment | 0.00 | 120.00 | -120.00 | 0.0% |
| Total Expense | 248,847.88 | 624,739.00 | -375,891.12 | 39.83% |
| Net Ordinary Income | 375,891.12 | 0.00 | 375,891.12 | 100.0% |
| Net Income | 375,891.12 | 0.00 | 375,891.12 | 100.0% |

INSTRUCTION LETTER

INSTRUCTION NUMBER: 17-05 WIOA

TO: SC Works Staff

SUBJECT: WIOA Transitional Jobs Policy

DATE

ISSUED: February 26, 2018

DATE

EFFECTIVE: Immediately

DATE

EXPIRES: Indefinitely

PURPOSE: The purpose of this policy is to articulate how Transitional Jobs (TJ) training funds are to be administered under the Workforce Innovation and Opportunity Act (WIOA). TJ are part of a portfolio of training services available to job seekers. TJ seek to connect individuals with chronic unemployment or an inconsistent work history with opportunities to build work place skills and job history.

BACKGROUND: According to §680.190, a “**Transitional Job**” is one that provides paid work experience that is:

- a. Time-limited, wage-paid and subsidized;
- b. In the public, private, or non-profit sector;
- c. Provided to individuals with barriers to employment who are chronically unemployed or have an inconsistent work history;
- d. Combined with comprehensive employment and supportive services; and
- e. Designed to help participants establish a work history, demonstrate success in the workplace, and develop skills that lead to entry into and retention in unsubsidized employment.

Individuals with “**chronic unemployment**” or an “**inconsistent work history**” are those who:

- a. Have been unemployed for 13 weeks or longer;
- b. Were unemployed at least 26 of the past 52 weeks; or
- c. Have held three or more jobs in the past 52 weeks and are currently unemployed or underemployed.

Transitional jobs must be combined with other career services to include supportive services. Accordingly, the participants must speak or meet with their talent development specialist on a regular basis, as agreed upon prior to the start of the transitional job. All transitional job requests are subject to review by the Upstate Workforce Board and must be reasonable, based on factors such as trainee experience, appropriate hourly wages, trainee needs, work history and any other relevant factors.

The SC Department of Employment and Workforce (SCDEW) does not create a one-size-fits all approach to transitional jobs, and considers these decisions are best made by the Local WDB. SCDEW declines to propose a minimum or maximum duration for transitional jobs.

The employer reimbursement rate defined in this policy is set by the Local Workforce Board. It can be up to 100 percent; however, it is allowable for employers to provide a certain percentage of the cost of a transitional job.

The Board recognizes that according to Section 134(d)(5), not more than ten percent of the adult and dislocated worker funds may be used to provide transitional jobs to individuals.

As outlined in §680.190, the work-based learning and work experiences offered through the transitional job may not be used to fill openings that resulted from a labor dispute.

PARTICIPANT ELIGIBILITY: In order to be eligible for a transitional job, the individual must:

- Have a high school diploma or its equivalent
- Be enrolled in SC Works Upstate WIOA Adult or Dislocated Worker program
- Have been determined to be an individual with a barrier to employment and a history of chronic unemployment or an inconsistent work history.
- Be currently unemployed.

EMPLOYER ELIGIBILITY: Potentially eligible employers able to participate as a Transitional Job placement site include:

- private-for-profit businesses, private nonprofit organizations, and public sector employers.

An employer will NOT be eligible to participate as a WIOA transitional job placement site if:

- The employer has any other individual on layoff from the same or substantially equivalent position.
- The transitional job would infringe upon the promotion of or displacement of any currently employed worker or a reduction in their hours.
- The same or a substantially equivalent position is open due to a hiring freeze.
- The employer is a private for-profit employment agency, i.e. temporary employment agency, employee leasing firm or staffing agency.

POLICY: *General WIOA Transitional Job Requirements*

- Business Solutions should execute an agreement with the employer detailing the position.
- Business Solutions will check to make sure that the transitional job does not fill an opening resulting from a labor dispute;
- The Talent Development Specialist (TDS) will ensure that the transitional job is combined with comprehensive career services.
- The TDS will also ensure participant receive appropriate supportive services.
- The TDS and Business Solutions will ensure the transitional job placement contributes to the occupational development and upward mobility of the participant.
- Per WIOA regulations (20 CFR 683.200(g)), "no individual may be placed in an employment activity if a member of that person's immediate family is directly supervised by or directly supervises that individual." For the purpose of this policy, the

term "immediate family" includes a spouse, child, son-in-law, daughter in-law, parent, mother in-law, father-in-law, sibling, brother-in-law, sister-in-law, aunt, uncle, niece, nephew, stepparent, stepchild, grandparent, and grandchild.

- Transitional job length must be time limited (no more than 6 months and preferably 8 to 12 weeks) and require at least fifteen (15) but not more than forty (40) hours of work per week.
- All transitional job placements must pay a minimum of \$12.00 per hour.
- There is no expectation that the employer providing the transitional job placement will hire the participant permanently.
- If the participating employer(s) has recently relocated, resulting in the loss of employment of any employee of such business at the original location in the U.S., TJ placements may not be granted to the employer(s) until after 120 days have passed since the relocation.
- TDS will speak or meet with the client on a regular basis as agreed upon prior to the start of the transitional job;
- TDS will track and keep records of the client's progress and the supportive services received during the duration of the transitional job; and
- The Upstate Workforce Board will provide oversight through regular reviews of the transitional job requests to make sure they are reasonable, based on factors such as trainee experience, appropriate hourly wages, trainee needs, work history and any other relevant factors.

ACTION: All staff are to read this policy and being utilizing transitional jobs when appropriate.

INQUIRIES: Should you have any questions concerning this instruction, please contact Ms. Dana Wood at (864) 596-2028 (TTY: 711) or wood@upstateworkforceboard.org.

Ann Angermeier, Director

Source: §680.190 and 134(d)(5) and other WIOA transitional job policies from multiple states.

**UPSTATE WORKFORCE BOARD
ONE STOP COMMITTEE MEETING
Committee Summary**

| | |
|--|--|
| Meeting Date | February 20, 2018 |
| Contact for Questions and Concerns | <p>Mr. Craig Jacobs - 864.266.1561 Email: cjacobs@spencerhines.com</p> <p>Ms. Dana Wood - 864.596.2028 Email : wood@upstateworkforceboard.org</p> |
| Significant Items and Issues Raised | <ul style="list-style-type: none"> • Dashboard/Just in Time Report • Financials • Policy Review • Lobby Redesign for SC Works Spartanburg • SC Works Union to Carnegie Library • MOU/IFA Update • Transportation Demo Grant |
| Action Taken | Discussion |
| Results and Outcomes | <p><u>SC Works Update</u> Ms. Dana Wood provided an update to the committee referencing the January 2018 <i>Dashboard</i> and <i>Just In Time</i> reports. The committee did not have any questions regarding the information that was provided.</p> <p><u>Financial Report</u> Mr. Brent Bishop reported on the budget for SC Works as well as the status of all other ResCare grants through December 2017. He mentioned that a few operating expenses are showing high amounts, but this does not reflect income that is pending from other partners.</p> <p><u>Policy Review</u></p> <ul style="list-style-type: none"> • WIOA 17-09 – Application Procedures for the Eligible Training Provider’s List (ETPL) This policy has been in place for years with adjustments being made as needed. Ms. Dana Wood explained that the state will be requiring provider performance reports soon to ensure the quality of the program. Ms. Wood explained that one of the local suggested requirements for a program to be added to the list is they must be in business under current ownership for a minimum of (2) years. After a brief discussion, it was decided that this requirement potentially needed a clause for special exemption approved by the One Stop Committee. • Regional WIOA R17-06 – Incumbent Works Training (IWT) and Rapid Response Policy and Procedures Ms. Johnnie-Lynn Crosby explained that during the last round of IWT solicitations, there was a company from Union which did not follow the policy regarding originals being mailed or delivered to SC Works Spartanburg, and; therefore, their application was denied. There was discussion regarding changing this policy to allow solicitations to be delivered electronically or to any of the SC Works locations in our service area. <p><u>Lobby Redesign for SC Works Spartanburg</u> Mr. Doug Stephenson presented the committee with two of the three quotes he solicited: for Alfred Williams and Young Office. So far, the Alfred Williams’ quote is coming in lowest and seems to be the better option. When Mr. Stephenson receives the third quote, he will send it out to the committee for review.</p> <p><u>General Topics of Discussion</u></p> <ul style="list-style-type: none"> • Living Wage – Ms. Wood shared the idea of raising/lowering the self-sufficiency wage for the local area that is currently at \$12.00/hr. Ms. Crosby stated that this could negatively impact Union and Cherokee Counties’ on-the-job training numbers |

| | |
|--|--|
| | <p>and potentially some Spartanburg trainings as well. The committee requested that more information be gathered regarding wages. Mr. Jacobs suggested discussing this topic with the full board.</p> <ul style="list-style-type: none"> • SC Works Union – Ms. Wood shared that the SC Works Union office has the opportunity to move to the newly renovated Carnegie Library building sometime within the next 6 to 9 months. SC Works will have a designated resource room, conference room and offices. The cost will be very low and shared on a square footage methodology. A motion to continue conversations and move forward with the process of securing space in the Carnegie Library for SC Works Union was made by Mr. Shelley Blount and seconded by Mr. Jeff Gossett. There was no further discussion, and the motion was passed unanimously. • MOU/IFA – Ms. Wood reported about the ongoing issues with customer engagement at the door of SC Works Spartanburg. SCSEP staff are not equipped to triage visitors properly to the center. At the MOU/IFA annual meeting, it was proposed that the partners share in the cost of hiring a Director of First Impressions to provide quality and consistency. The partners countered with an offer to staff the position on a rotating basis with their agency employees beginning July 1, 2018. Also, there are new potential partners in the sharing agreement: Fatherhood Coalition, TANF and Telamon. <p><u>Other Business & Adjourn</u> None</p> |
| Items Referred for Board Action | <p>The OneStop Committee recommends that Board staff continue conversations and move forward with the process of securing space in the Carnegie Library for SC Works Union.</p> <p>The OneStop Committee recommends the approval of the revised IWT policy as written.</p> <p>The OneStop Committee recommends the approval of the ETPL policy as written.</p> |
| Website Reference | www.upstaterworkforceboard.org |

AGENDA

ONE STOP COMMITTEE MEETING

February 20, 2018

12:00 noon

SC Works-Upstate

- Welcome Mr. Craig Jacobs
- SC Works Update Ms. Dana Wood
 - Dashboard
 - Just in Time Report
- Financial Report Mr. Brent Bishop
- Policy Review Mr. Craig Jacobs
 - ETPL*
 - IWT*
- Lobby Re-Design* Mr. Doug Stephenson
- General Topics of Discussion Ms. Dana Wood
 - Living Wage*
 - SC Works Union*
 - MOU/IFA
 - Transportation Demo Grant Update
- Other Business & Adjourn

**denotes a voting item*

Next Meeting Date: April 10, 2018

Our Mission Statement:

Build and maintain a workforce development system that meets the needs of employers.

SC Works Greater Upstate

Monthly Report Card FY17

(January 2018)

Bringing Employers
and
Job Seekers
Together



DASHBOARD 01/01/2018 through 01/31/2018

| | 1st Quarter | | | 2nd Quarter | | | 3rd Quarter | | | 4th Quarter | | | TOTAL |
|--|-------------|-------|-------|-------------|--------|-------|-------------|-----|-----|-------------|-----|-----|-------|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | |
| Total Center Traffic | 2871 | 3113 | 2707 | 2890 | 2105 | 2135 | 2521 | 0 | 0 | 0 | 0 | 0 | 18042 |
| WIOA Traffic (Spartanburg 146, Gaffney 29, Union 47) | 217 | 307 | 277 | 248 | 174 | 268 | 222 | | | | | | 1713 |
| UI Traffic (Spartanburg 438, Gaffney 204, Union 178) | 833 | 846 | 855 | 803 | 762 | 735 | 820 | | | | | | 5654 |
| WP Traffic (Spartanburg 898, Gaffney 301, Union 439) | 1724 | 2040 | 1752 | 1529 | 1206 | 1191 | 1638 | | | | | | 11080 |
| Total Unduplicated Center Traffic | 1573 | 1805 | 1570 | 1408 | 1213 | 1244 | 1533 | 0 | 0 | 0 | 0 | 0 | 16346 |
| # Scheduled for Orientation | 46 | 69 | 43 | 44 | 23 | 39 | 52 | 0 | 0 | 0 | 0 | 0 | 316 |
| # Attended Orientation | 28 | 56 | 38 | 36 | 14 | 29 | 37 | 0 | 0 | 0 | 0 | 0 | 236 |
| # of Workshops Offered | 4 | 20 | 10 | 16 | 13 | 12 | 13 | 0 | 0 | 0 | 0 | 0 | 88 |
| # Scheduled for Workshops | 23 | 51 | 16 | 32 | 29 | 32 | 66 | 0 | 0 | 0 | 0 | 0 | 249 |
| # of Workshop Attendees | 18 | 44 | 11 | 16 | 16 | 25 | 51 | 0 | 0 | 0 | 0 | 0 | 181 |
| New ADULT Enrollments | 24 | 31 | 20 | 20 | 9 | 27 | 20 | | | | | | 151 |
| New DW Enrollments | 0 | 4 | 2 | 2 | 2 | 3 | 3 | 0 | 0 | 0 | 0 | 0 | 16 |
| Total Caseload | 293 | 295 | 299 | 304 | 294 | 310 | 286 | 0 | 0 | 0 | 0 | 0 | 253 |
| New ADULTS beginning training** | 18 | 19 | 18 | 24 | 10 | 25 | 18 | 0 | 0 | 0 | 0 | 0 | 132 |
| New DWs beginning training** | 0 | 3 | 1 | 2 | 1 | 1 | 8 | 0 | 0 | 0 | 0 | 0 | 8 |
| % New Clients vs Clients Entering Trng | 75.0% | 62.0% | 56.4% | 118.2% | 100.0% | 86.7% | 71.3% | | | | | | 96.8% |
| # of New Job Orders Placed | 326 | 351 | 320 | 342 | 263 | 217 | 295 | 0 | 0 | 0 | 0 | 0 | 2114 |
| # of New Jobs Available | 591 | 671 | 2488 | 915 | 1655 | 1822 | 832 | 0 | 0 | 0 | 0 | 0 | 8974 |
| # Entered Employment | 43 | 50 | 20 | 65 | 28 | 34 | 32 | 0 | 0 | 0 | 0 | 0 | 272 |

TALENT DEVELOPMENT SPECIALISTS CASELOADS:

Jocelyn Bell - 66
Mekia Jones - 45
Nikki Burgess - 66
Renee Carries - 89

**WIOA UI and WP numbers are for number of services provided not individual traffic counts*

**Training figures include activities 215, 217, 300, 301, 327, and 328.

CENTER TRAFFIC:

Location FY17 FY18 Change
*Cherokee 457 0 +457
*Spartanburg 1519 1726 +207
Union 645 498 +147

Spartanburg offices merged on 12/9/16

New Gaffney Office numbers starting 2/1/17

New Trainings by County

Cherokee = 1
Spartanburg = 11
Union = 4

TRAINING PROVIDERS AND PROGRAMS

| Provider | Training Program/Number of employees |
|-----------|--------------------------------------|
| Limestone | Computer Science 1 |
| TOL | CDL 3 |
| G. Tech | CDL 1 |
| G. Tech | 80 to Work 3 |
| SCC | Mechanicals 1 |
| SCC | Welding 1 |
| Archie | Welding 1 |
| G. Tech | Sonography 1 |
| OSI/NEP | Established 4 |

Highlighted Events and Outreach

January 1st – January 31st

- Kenneth met with the Mayor of Calhoun to see how SC Works could assist the rural citizens of Union County. SC Works has been invited to attend a food drive in February to speak to individuals regarding the services we offer.
- Kenneth met with Don Simpson to discuss topics for the upcoming workshop series to be offered at SCC Union.
- SC Works Greater Upstate held Monthly Partner Meeting in Spartanburg office. Upstate Fatherhood Coalition was the main presenter. They spoke about their programs and partnership with the community. SC Works staff shared the programs we have in the center and upcoming projects.
- Nancy, along with Ruth and Greenville, TDS staff met with the new program coordinator of CCI to discuss how to facilitate programs they offer to best serve the WIOA customers.
- Kenneth visited the Spartanburg Detention Center for Semester 3 of Operation Educate. He presented a variety of career topics over 2 days including Soft Skills, Interviewing, Application Tips, and Resume Writing. The participants successfully wrote a Resume and completed a job application as part of the training. There were 11 students present.
- Debra and Nancy attended the 2018 Point In Time Homeless Counts event at the Spartanburg County Library. SC Works had a table and gave information about programs, and the function of SC Works in the Community.
- Kenneth and Melba went to Miracle Hill to conduct an onsite WIOA Orientation and enrollment assessment. Information was shared about the program and how it could benefit the residents there.
- Kenneth went to Vocational Rehab and was offered a tour of the new joint facility with Freightliner in Gaffney. This facility allows VR clients to work there providing materials to Freightliner and learn valuable skills for shipping/receiving. Kenneth also met with Bethany to discuss conducting onsite workshops to the clients employed at the facility as part of their career readiness preparation.

Social Media Outreach:

Facebook: 34 Posts and 76 Likes, A TD 224 Posts
PY January Post Goal: 21 PY 17 Goal: 250 Posts

Twitter: 27 Posts

Community Engagement:

Goal: Spartanburg-6, Cherokee-4, Union-4
Actual: Spartanburg-12, Cherokee-4, Union-4

Just In Time Report

Business Services Focus

- Johnnie-Lynn and Doug attended the Annual Legislative Update Luncheon hosted by the UWB ED, Ann Angermeier. In attendance other than UWB staff and Curfiss Anderson, Chair, UWB, were local council members and representatives for Rep. Trey Gowdy and Sen. Lindsey Graham.
- Tori and Tracy attended the Northside Development Group Job Fair for Harper Construction and several other sub-contractors. The goal was to promote and find future OJT opportunities.
- BST Team & TDS Jocelyn attended the Upstate BEDA/CATE Contextual Winter Conference. The purpose of the conference was to help understand all new changes and updates to better serve future workforce.
- Doug attended The Economic Forecast Breakfast; it is an event for Chamber members and their guests to learn about economic trends and forecasts from experts. Sarah House - Economist, Wells Fargo Securities presented the keynote address focusing on regional, national, and global projections.
- BST held a job fair on January 30th, at CC Woodson Community Center. The job fair was linked to the Ride to Success Transportation Grant.

| Enrollment Data | PY17 | January |
|-----------------|------|---------|
| Union | | |
| New Trainings | 20 | 4 |
| Enrollments AD | 28 | 3 |
| Enrollments DW | 7 | 1 |
| Cherokee | | |
| New Trainings | 10 | 2 |
| Enrollments AD | 29 | 2 |
| Enrollments DW | 3 | 1 |
| Spartanburg | | |
| New Trainings | 58 | 13 |
| Enrollments AD | 94 | 15 |
| Enrollments DW | 6 | 1 |
| OJT's | | |
| | 17 | 3 |

J.I.T. PY17
1/1/18 thru 1/31/18 Data
7

Talent Engagement News:

| Center | Job Referrals | Placements |
|-------------|---------------|------------|
| Gaffney | 304 | 0 |
| Spartanburg | 1626 | 27 |
| Union | 153 | 10 |

SC Works WIOA Orientation, WorkKeys, and Workshop Data

WIOA Orientation Attendees: (Group and One on One Sessions)

Cherokee – 9
Spartanburg – 24
Union – 4

WorkKeys Completed: 1/1 – 1/31 Spartanburg – 25 Union – 21

Intensive Workshop Attendance: 51

Training/Support Services Funding PY 17

| | Fund Amount | Obligated | Remaining |
|----------|-------------|-----------|-----------|
| Adult | 299,039 | 234,323 | 31,302 |
| ITA | | | |
| Adult | 150,000 | 118,748 | 31,251 |
| OJT | | | |
| Adult | 35,000 | 20,113 | 14,886 |
| WEP | | | |
| Adult SS | 33,360 | 19,327 | 14,032 |
| DW/ITA | 90,462 | 29,037 | 61,424 |
| DW/SS | 6,640 | 2,480 | 4,159 |

Upstate Workforce Board
Profit & Loss Budget vs. Actual
July through December 2017

| Arbor | | | | | |
|----------------------------------|-------------|---------------------|---------------------|--------------------|---------------|
| | 50% of PY17 | Jul - Dec 17 | Budget | \$ Over Budget | % of Budget |
| Income | | | | | |
| Grants Received | | 1,309,265.35 | 1,309,265.35 | 0.00 | 100.0% |
| Total Income | | 1,309,265.35 | 1,309,265.35 | 0.00 | 100.0% |
| Expense | | | | | |
| Administration | | | | | |
| Dues, Prof fees, Subscriptions | | 1,100.00 | 1,500.00 | -400.00 | 73.33% |
| Fringes | | 43,612.05 | 106,843.74 | -63,231.69 | 40.82% |
| Indirect Cost | | 42,067.99 | 78,460.10 | -36,392.11 | 53.62% |
| Management Fee | | 36,004.80 | 72,009.59 | -36,004.79 | 50.0% |
| Salaries | | 222,922.52 | 430,107.50 | -207,184.98 | 51.83% |
| Total Administration | | 345,707.36 | 688,920.93 | -343,213.57 | 50.18% |
| Operating Expenses | | | | | |
| Computers and Software | | 2,020.26 | 17,085.00 | -15,064.74 | 11.83% |
| Contract/Consulting Services | | 15,746.45 | 33,052.52 | -17,306.07 | 47.64% |
| Equipment Rental | | 2,326.18 | 4,680.00 | -2,353.82 | 49.71% |
| Mileage | | 5,121.17 | 11,000.00 | -5,878.83 | 46.56% |
| Misc. & Facilities Costs | | 6,497.02 | 11,095.08 | -4,598.06 | 58.56% |
| Office Supplies | | 2,340.82 | 6,471.98 | -4,131.16 | 36.17% |
| Outreach | | 1,874.47 | 2,000.00 | -125.53 | 93.72% |
| Postage | | 324.22 | 1,050.00 | -725.78 | 30.88% |
| Printing Supplies | | 1,125.84 | 6,320.00 | -5,194.16 | 17.81% |
| Professional Development | | 2,850.00 | 4,190.00 | -1,340.00 | 68.02% |
| Rent | | 74,525.68 | 75,000.00 | -474.32 | 99.37% |
| Telephone | | 7,407.80 | 13,654.80 | -6,247.00 | 54.25% |
| Travel-Out of Town | | 758.09 | 4,425.00 | -3,666.91 | 17.13% |
| Utilities | | 5,568.05 | 10,320.04 | -4,751.99 | 53.95% |
| Total Operating Expenses | | 128,486.05 | 200,344.42 | -71,858.37 | 64.13% |
| Supportive Services | | | | | |
| Books, Tools, Uniforms, Fees | | 3,157.72 | 3,000.00 | 157.72 | 105.26% |
| Childcare | | 1,740.00 | 2,000.00 | -260.00 | 87.0% |
| Other Emergency Support | | 964.80 | 1,000.00 | -35.20 | 96.48% |
| Transportation | | 6,847.00 | 24,000.00 | -17,153.00 | 28.53% |
| Total Supportive Services | | 12,709.52 | 30,000.00 | -17,290.48 | 42.37% |
| Training Expenses | | | | | |
| Instructional Training | | 114,212.77 | 299,000.00 | -184,787.23 | 38.2% |
| OJT Training | | 59,065.72 | 62,200.00 | -3,134.28 | 94.96% |
| Work Experience | | 25,338.23 | 28,800.00 | -3,461.77 | 87.98% |
| Total Training Expenses | | 198,616.72 | 390,000.00 | -191,383.28 | 50.93% |
| Total Expense | | 685,519.65 | 1,309,265.35 | -623,745.70 | 52.36% |
| Net Income | | 623,745.70 | 0.00 | 623,745.70 | 100.0% |

PY17

Arbor Grants

| | TOTAL | Current % | 50% |
|---|-------------------------------------|---------------|---------------|
| | thru December 31, 2017 Expenditures | Budget | Variance |
| Re-Entry 16M903RET01-UWB #16RET01 (11-1-18) | \$ 84,173.43 | \$ 170,420.00 | \$ 86,246.57 |
| Transportation 16TDG03 (12-31-18) | \$ - | \$ 100,000.00 | \$ 100,000.00 |
| RR 17M903RRWT05-UWB #17RRWT05 (7-31-18) | \$ - | \$ 49,980.00 | \$ 49,980.00 |
| IWT 17M903IWT03-UWB #17IWT03 (10-31-18) | \$ - | \$ 165,000.00 | \$ 165,000.00 |
| Totals | \$ 84,173.43 | \$ 485,400.00 | \$ 401,226.57 |
| | | | 17.34% |

INSTRUCTION LETTER

INSTRUCTION NUMBER:

WIOA #17-09

TO: SC Works Operator Staff and any entity requesting to become an Eligible Training Provider

SUBJECT: Application Procedures for the Eligible Training Provider's List

DATE

ISSUED: February 16, 2018

DATE

EFFECTIVE: Immediately

DATE

EXPIRES: Indefinitely

PURPOSE: To transmit the Upstate Workforce Board area's policies and procedures governing applications for the Eligible Training Provider List under the provisions of the Workforce Innovation and Opportunity Act (WIOA). It repeals Upstate Instruction Letter 14-01 regarding this matter.

BACKGROUND: Section 122 of the Workforce Innovation and Opportunity Act (WIOA) establishes the eligibility criteria for training providers seeking to be placed on the list of providers eligible to receive funding for training WIOA-eligible participants. Subject to the provisions of WIOA, the provider shall be:

1. An institution of higher education that provides a program that leads to a recognized post-secondary credential;
2. An entity that carries out programs registered under the "National Apprenticeship Act" (50 Stat. 664, chapter 663; 29 U.S.C. 50 et seq); or
3. Another public or private provider of a program of training services and eligible providers of adult education and literacy activities under Title II if such activities are provided in combination with occupational skills training.

Providers of on-the-job training, customized training, incumbent worker training, internships, paid or unpaid work experience opportunities, or transitional employment shall not be subject to the provisions of this instruction.

POLICY: The Statewide List of Eligible Training Providers includes all training programs that are currently certified by one or more Boards. General inquiries regarding certified programs should be directed to the Upstate Workforce Board (UWB), PO Box 5666, Spartanburg, SC 29304 or via email to wood@upstateworkforceboard.org or by phone at 864-596-2028 and ask for Dana Wood.

The Upstate Workforce board will consider all programs approved for the Statewide Eligible Training Providers List, but establishes the following additional requirements of entities seeking eligibility to provide training services in the Upstate Workforce Board area:

1. Be in business under their current ownership for a minimum of two (2) years, and

provide performance data for programs.

2. Be licensed by the South Carolina Commission on Higher Education (CHE) or submit a letter from CHE indicating licensure is not required.
3. Be nationally or regionally accredited by a regulating body recognized by the US Department of Education (such as SACS, NEASC, NCA, MSA, WASC, NWCCU) <https://ope.ed.gov/accreditation/agencies.aspx>
4. Where programmatic accreditation is not available for a course of study, the provider must be able to issue an industry recognized and portable credential to participants completing the course.
5. Offer training in a facility that is in compliance with ADA requirements, and be able to pass a site visit.
6. Report their performance to the South Carolina Department of Employment & Workforce's SC Works Online Services system (SCWOS) – required beginning October 1, 2018 for new WIOA students.
7. Be subject to a review/analysis by the Upstate Workforce Board (UWB), and respond to all questions or concerns of the UWB.

*Providers who operate solely as online institutions are not eligible for local approval.

ELIGIBLE TRAINING COURSES:

1. Must be offered to the general public.
2. Must be for an in-demand occupation in the UWB area.
3. Must have supporting documentation of \$12.00 per hour entry wages.

CONTINUING ELIGIBILITY WILL BE EVALUATED BY THE UWB.

1. ETP must continue to have valid accreditation:
 - a. Maintain accreditation; and
 - b. Continue to supply student-based information to SCWOS.
2. For courses to remain on the local ETP list, the training course must:
 - a. Have training related placement rates within guidelines of UWB policy (still to be determined);
 - b. Be for a demand occupation in the UWB area.

USE OF THE TERM INDIVIDUAL TRAINING ACCOUNT (ITA)

The term voucher system is synonymous with the term Individual Training Account (ITA) as

used in section 134 of the WIOA.

USE OF ITA'S

In general, training services shall be provided to eligible adults and dislocated workers through the use of an ITA issued by the local workforce area or by the local SC Works Center, in accordance with procedures established herein. Please refer to the latest version of local instruction letter R17-01 for the current policy on ITA limitations. Funds must be used to train individuals for high wage/high demand occupations.

Payment for training services will be made through the use of a voucher, issued in an amount agreed upon prior to the start of training by the use of a scholarship budget. The voucher should be consistent with the scholarship budget and sufficient to cover the approved training service costs for eligible adults, dislocated workers and older out of school youth who are unable to obtain other grant assistance for such services, including Federal Pell Grants; or eligible adults, dislocated workers and older out of school youth who require assistance beyond the assistance made available under other grant assistance programs, including Federal Pell Grants.

In addition to the invoice, the training provider will be responsible for providing the service provider's case management personnel with WIOA participant attendance records, periodic and final reports on the participant's progress, grade or competency achievement, performance appraisals (when applicable), and such other information necessary to assess the participant's progress in the training program.

Tuition reimbursements will be made upon submission of the invoice. Occasional delays of state funding may affect the timing of ETP tuition reimbursements. The service provider reserves the right to reject vouchers not submitted for redemption in a timely fashion in accordance with established policy.

Private providers must agree to the following payment schedule before anyone may be sent for training:

- 50% of required funds for the total training will be paid to the provider at the start of training,
- 25% will be paid at the time the participant successfully completes 50% of the training,
- The last 25% will be paid when the training is successfully completed.

Appropriate facilities and systems of providers of training services must be accessible to monitoring and/or auditing by all appropriate representatives and/or agents, of the Federal, State and local workforce area. All Eligible Training Providers must have a Provider Consumer Report on training performance and costs available to WIOA participants.

Inclusion on the Statewide List of Certified Training Providers, in itself, does not guarantee that WIOA funds are available for enrollment in an eligible offering. The availability of WIOA funding for enrollment is based on many factors, including an assessment of each

individual's employment needs.

APPEAL PROCEDURES:

The UWB also reserves the right not to approve training programs that are part of the Statewide list in accordance with established policies.

The UWB will notify the training provider in writing when a determination is made re: the placement of a course on the local training provider list. In the event that the UWB declines to place a provider from the Statewide list on the local area's list of approved training programs, the training provider will have the right to appeal that decision. In addition, the UWB reserves the right to terminate a provider's eligibility for placement on the local training provider list if it determines it is in its best interest to do so. Reasons for the termination of a training provider's eligibility for the local list include, but are not limited to, intentional supplying of inaccurate or false information, substantial violations of the Workforce Investment Act (WIA) or Workforce Innovation and Opportunity Act (WIOA), change in the industry's demand for a specific training program, unsatisfactory performance, change in the quality of the program or its ability to produce a post-secondary or industry-recognized credential, etc.

In the event that a training provider is not approved for, or is approved but subsequently removed from the UWB's local list, the following appeal procedures will apply.

APPEAL PROCEDURE

- a. The applicant submits a Notice of Appeal to the Executive Director of the local Board at the local Workforce Area office. The appeal must be received within 10 days after the date of the letter of denial or removal.
- b. Should an appeal not be filed and received within 10 working days after the letter of denial, the denial will stand. There will be no recourse for appeal after the 10 working days expiration time.
- c. The appeal will be submitted to the local Board's Executive Committee, reviewed and scheduled for an appeal hearing by the Executive Committee. The applicant will be notified of the location, date, and time of the scheduled hearing to present to the Executive Committee.
- d. The Executive Director or Board Chair will notify the applicant of the Executive Committee's final decision within five days of the appeal hearing.
- e. The Executive Committee's decision may be appealed to the State per the State Appeal Procedures. These procedures will be provided at time of denial from the local Executive Committee.

All appeals to the local Upstate WB should be submitted to:

Ms. Ann Angermeier, Executive Director
Upstate Workforce Board
PO Box 5666
Spartanburg, SC 29304

Nothing in this instruction prevents a complainant from pursuing a remedy authorized under another Federal, State or local law.

ACTION: Training providers seeking initial eligibility for the Statewide Eligible Training Provider's list are required to submit requested information to the SC Department of Employment and Workforce using the Palmetto Academic Training Hub (PATH) portal <https://www.scworks.org/etp.asp>. Detailed instructions and tutorials are available to assist interested training providers in uploading their information to the State ETPL. Once the initial vetting of the program application is concluded by the State and the Upstate Workforce Board is notified, the UWB staff will make a determination, based on established policies, regarding whether or not the course(s) will be placed on the local area's list, for those providers who request placement on the UWB's local list. This process will apply to both initial and subsequent eligibility applications.

INQUIRIES: Questions may be directed to Dana Wood wood@upstateworkforceboard.org or 864-596-2028 TTY:711.

Ann Angermeier, Director

Replaces local instruction letter 14-01



INSTRUCTION LETTER

REGIONAL INSTRUCTION NUMBER: WIOA R17-06

TO: SC Works Operator/Service Provider

SUBJECT: Incumbent Works Training (IWT) and Rapid Response Policy and Procedures

| | | |
|--|---|--------------------------------------|
| DATE | DATE | DATE |
| ISSUED: <u>November 2, 2017</u> | EFFECTIVE: <u>November 2, 2017</u> | EXPIRES: <u>Indefinitely*</u> |

PURPOSE: The purpose of this instruction letter is to advise all necessary entities of the new IWT and Rapid Response Policy.

BACKGROUND: Each program year the State Workforce Development Board (SWDB) has WIOA dollars that they hold back to issue as "statewide grants." Each year the SWDB issues grants to local Workforce Boards (WBs) to be used by local employers for incumbent worker training. Incumbent workers are workers who are already employed by the employer. In addition, Local Workforce Boards may also designate up to 20% of their combined total Adult and Dislocated Worker allocated funds for the cost of providing IWT.

ACTION: The Upstate Workforce Board (UWB), the Greenville County Workforce Development Board (GCWDB), and the SC Works Greater Upstate Operator will follow the procedure outlined below in administering these funds at the local level.

POLICY:

APPLICATION PROCESS

1. An IWT Ad Hoc Review Committee (designated by each board) shall review applications. The review meeting will last until all applications are reviewed; this should be taken into consideration when scheduling the meeting. It is recommended that this meeting take place *approximately fifteen (15) business days after the application deadline date for receiving applications*. Recommendations for funding will then be presented to each board for approval. It is the responsibility of the SC Works Greater Upstate Business Services Lead (BSL), in conjunction with the Board staff, to ensure that this date is set and suitable for all reviewers.
2. The BSL will accept applications from eligible employers seeking incumbent Worker Training grants. The application period will be identified in a press release and on the

UWB, GCWDB, and SC Works Greater Upstate websites. The application period will always be at least three (3) weeks in length to allow adequate time for companies to prepare applications.

The BSL will be responsible for disseminating the attached application (Attachment A) and procedures (Attachment B) with a notice announcing the application period to the following partners:

- ◆ **Spartanburg Area Chamber of Commerce CEO**
- ◆ **Greenville Chamber of Commerce CEO**
- ◆ **Union Chamber of Commerce CEO**
- ◆ **Cherokee County Chamber of Commerce CEO**
- ◆ **Greater Greer Chamber of Commerce CEO**
- ◆ **Simpsonville Chamber of Commerce CEO**
- ◆ **Mauldin Chamber of Commerce CEO**
- ◆ **Fountain Inn Chamber of Commerce CEO**
- ◆ **Upstate Employer Network President**
- ◆ **Spartanburg Community College VP of Corporate & Community Education**
- ◆ **Greenville Technical College VP of Economic Development and Corporate Training**
- ◆ **Spartanburg Economic Future's Group Executive Director**
- ◆ **Cherokee County Development Board Executive Director**
- ◆ **Union County Development Board Executive Director**
- ◆ **Greenville Area Development Corporation CEO**
- ◆ **Greer Development Corporation**
- ◆ **South Carolina Manufacturing Extension Partnership (SCMEP)**
- ◆ **Spartanburg Downtown Association**
- ◆ **Greer Downtown Association**
- ◆ **South Carolina Manufacturing Alliance (SCMA)**
- ◆ **Small Business Development Center**
- ◆ **Upstate Alliance**
- ◆ **Ten at the Top**
- ◆ **SHRM (local chapters)**
- ◆ **South Carolina Business Opportunities (SCBO)**

The BSL will also send a press release to the *Spartanburg Herald-Journal*, *Gaffney Ledger*, *Cherokee Chronicle*, *Union Daily Times*, *Union County News*, *Greer Citizen*, *Greenville News*, *Upstate Business Journal*, and any other relevant newspaper(s) to be determined at the time of release, as well as other media outlets.

The notice will include the deadline date as well as the method by which applications will be accepted. Applications will be accepted by the SC Works Greater Upstate offices:

**For Spartanburg, Cherokee, and Union Counties
Attn: Johnnie-Lynn Crosby, Business Services Lead
SC Works Greater Upstate**

220 E. Kennedy Street, Spartanburg, SC 29302
(864) 764-1966, TTY: 711

For Greenville County

Attn: Johnnie-Lynn Crosby, Business Services Lead

SC Works Greater Upstate

225 S. Pleasantburg Drive, Suite E-1, Greenville, SC 29607

(864) 467-8080, TTY: 711

Applications that arrive after the deadline date or that are delivered to the wrong location will not be accepted, and postmarks will not be accepted if application arrives after the deadline date (*the BSL should clearly state proper mailing addresses on all communication*). It will also be noted in the release that applications missing any required information will not be accepted.

The application and guidelines will be made available on the UWB, GCWDB, and SC Works Greater Upstate websites for the duration of the application period. There must be a minimum of one grant awarded to employers in each county of Cherokee, Greenville, Spartanburg, and Union (if properly completed applications are received from all counties).

As applications are received, the date and time received should be marked in ink in the top right corner on the application along with the initials of the staff member who accepts the application. All applications should be forwarded to the BSL who will be responsible for compiling all originals of applications received into a central file.

3. The contact person for employer questions should always be the BSL. The SC Works Greater Upstate Business Services Team (BST) may provide assistance in completing the application to any company requesting such assistance.
4. Applications will be reviewed by the BSL, or any designees, for accuracy and eligibility. Eligibility criteria include:

Business Eligibility for Incumbent Worker Training Funds

- Each business must have at least one full-time employee and be current on all State and County tax obligations.
 - Third parties or consortia acting on behalf of a group of employers are eligible to recipients of IWT (e.g., business associations, industry councils, chambers of commerce, or downtown/community development corporations).
 - Training entities/training providers are not eligible for IWT funding or to act on behalf of a business or group of businesses as a third party.
 - City, county, and state governments are not eligible for IWT funding.
- NOTE: Generally, IWT should be provided to private sector employers; however, there may be instances where non-profit and local government entities may be recipients of IWT funds. For example, IWT may be used in the health care industry

where hospitals are operated by non-profit or local government entities and a nursing upskilling opportunity is available.

- A business receiving services through ReadySC is not eligible to receive IWT funding for the same training. Employers who are receiving ReadySC services will have their IWT funding requests evaluated on a case-by-case basis for eligibility.
- A business that has relocated resulting in the loss of jobs at the original location is not eligible for IWT funding. Such a business becomes eligible once operational in the new location for 120 days.
- Applicants must complete IWT application and submit to the correct SC Works location before the application deadline;
- Businesses that request training funds due to any of the following are eligible: Expansion, new technology, retooling, new services/product lines and new organizational structuring or as part of a layoff aversion strategy.
- Trainings requested must be eligible trainings (not OSHA or other routine costs of doing business trainings).

In addition to the Business Eligibility criteria listed above, the following criteria must be considered when determining which companies will receive IWT funding:

- The characteristics of the individuals who would receive training
- Whether the training improve the labor market competitiveness of the employees or both the employees and the employer
- Other factors, which will only be considered in the instance of a tied score between two or more companies requesting funds.
 - The employer in consideration who is proposing to train the largest number of incumbent workers should receive one bonus point.
 - Each employer requesting to train employees with an industry recognized credential should receive one bonus point.
 - Each employer who has indicated there will be layoffs averted as a result of the training should receive one bonus point.

Worker Eligibility for Incumbent Worker Training Funds

- The incumbent worker must be employed by the business and meet Fair Labor Standards Act requirements for an employer-employee relationship.
- The incumbent worker must have an established employment history with the employer for six months or more (which may include time spent as a temporary or contract worker performing work for the employer receiving IWT funds).
 - There is one exception to this rule. When IWT is being provided to a cohort of employees, not every employee in the cohort must have an established employment history with the employer for six months or more as long as a majority of those employees being trained meet the employment history requirement.
 - The UWB and GCWDB have developed an additional form (Attachment M) to be completed and signed by the employer prior to receiving training. The employer guarantees that the six-month criteria above applies to the

employees receiving training through the contract and agrees to supply documentation upon monitoring. Any disallowed costs will be the responsibility of the employer.

- An incumbent worker does not have to meet the eligibility requirements for participation in the Adult or Dislocated Worker program, unless also enrolled as a participant in the WIOA Adult or Dislocated Worker program.

Employers participating in IWT are required to pay for a share of the cost of providing the training to incumbent workers. The UWB and GCWDB will use employer size to determine employer share. For a business location with not more than 50 employees, the employer share is 10 percent of the cost. For a business location with more than 50 employees but not more than 100 employees, the employer share is 25 percent of the cost. For a business location with more than 100 employees, the employer share is 50 percent of the cost. The employer share can be met through cash payments, fairly evaluated in-kind contributions, or both. The employer share must not come out of any other Federal funds. The employer share may include the wages the employer pays to the incumbent worker trainee while the worker is attending training.

Upon review of the applications, if any business has selected that they have experienced a layoff or relocated operations, the BSL should have the business complete the UWB/GCWDB Pre-Award Review Section 1 and the BSL should complete the UWB/GCWDB Pre-Award Review Section 2 (Attachment C).

SC Works Greater Upstate staff members are encouraged to seek guidance from the appropriate Board on any application or requested training that seems questionable in terms of eligibility and allowable activities PRIOR to the review meeting. Trainings "not allowable" will be marked as such and will not be reviewed by the committee. A list of ineligible applicants will be provided with an explanation for the review committee.

If upon review, the eligibility for Incumbent Worker Training funds has not been met, the application will be marked "Disapproved," dated, and an explanatory letter will be sent to the employer. A copy of the letter will be attached to the original application and the application will remain in the central file.

REVIEW PROCESS

IWT applications are reviewed by the appropriate Board's IWT Review Committee (hereinafter referred to as "reviewers").

Should a reviewer's company apply, he/she shall refrain from participating in the entire review process. Once the application deadline has passed and a list of eligible companies is made available, appropriate Board staff will ensure that a Conflict of Interest Statement (Attachment D) is completed by each reviewer, prior to the start of the review process.

5. The BSL and/or designated staff will complete the following:

- Fill out an IWT grant score sheet based on each employer's application (Attachment E);
- Create an excel spreadsheet summarizing the training requested (Attachment F); and
- Maintain a copy of the IWT Grant Application (Attachment A).

The BSL and/or designated staff are responsible for having information available for review at the review committee meeting.

6. Review Committee Meeting:

During the review committee meeting, the designated UWB or GCWDB staff will take thorough minutes. It is imperative that justification be detailed for each application funded or not funded.

The review committee will evaluate data presented by the BSL and have the opportunity for input, questions, and discussion. The BSL and the appropriate Associate Director will compile scores during the meeting. Should a tie occur, the reviewers will re-evaluate the applications that are tied (separately with detailed minutes of review) and re-score those applications.

At the conclusion of the meeting, the BSL will provide the committee with a final list of trainings to be funded in order from highest to lowest scored. The committee will then recommend to the full board that IWT funding is allocated to companies in order of the rankings until state and local funding (as available) are exhausted. Any application that the committee chooses not to include in the rankings should be marked "Disapproved" with the committee date filled in.

The detailed minutes of the meeting will be distributed by the designated UWB/GCWDB staff member within five (5) working days to the appropriate Executive Director, each reviewer, the BSL, and the SC Works Greater Upstate Project Director. The BSL should keep meeting minutes at the front of the central file.

The BSL and/or designated staff is responsible for determining which of the IWT agreements will be funded through State IWT funds and which will be funded through Local IWT funds. The UWB and GCWDB expect all state funding to be designated prior to use of local reserved IWT dollars. The BSL should clearly indicate which funds are being used when submitting the final list of approved businesses to the appropriate Board staff.

The slate of approved businesses and training programs will be presented to the full UWB/GCWDB for approval.

GRANT EXECUTION

7. The UWB/GCWDB Executive Directors will receive announcement of IWT funding from the

SCDEW office. Spartanburg County and Greenville County will receive the grant award from SCDEW.

Spartanburg County and Greenville County will then issue a sub-grant, separate from regular formula fund agreements, to the SC Works Greater Upstate operator to carry out the activities set forth in the statement of work for the IWT program. This sub-grant will allocate IWT resources to the SC Works Greater Upstate operator for agreements with approved businesses. The SC Works Greater Upstate operator will be responsible for complying with the statement of work and held accountable for the proper use of funds.

8. With approval from the full board and execution of the IWT sub-grant to the SC Works Greater Upstate operator, the BSL will write a letter to each employer funded and not funded advising them of the board's decision. A list of IWT employer names and grant awards should be sent to the list of partners listed above (Section 2). A press release should be distributed to media outlets listed above (Section 2).
9. The appropriate BST member should begin writing grants using the attached "IWT Agreement Packet" that includes a work statement and other required documents (Attachment G). The grant numbers are assigned as follows:
 - The first digit will always be 0;
 - The second three letters will always be IWT;
 - The fifth and sixth digits are the ending numbers of the current program year (i.e. if program year 2017, July 1, 2017 through June 30, 2018, the digits will be 17);
 - Then two letters that are an abbreviation of the employer name (e.g. the letters used for Linpac were LI);
 - All applications have the ending – UWB or GCWDB.

All grants must have a number that is unique to that grant so that duplications do not occur.

The company should be contacted by the BST member to confirm the training timeline to be included in the grant agreement. *The company will be expected to start training on time; training must begin within one (1) month of the stated time. The statement of work will reflect that if training has not started within the specified time frame, the agreement will end and funds will be recaptured for use elsewhere. It is imperative that training outlines be as accurate as possible.*

Compliance Documentation Required: W9 (Attachment H)

10. Once the grant has been reviewed for accuracy by the BSL, TWO (2) originals will be printed. The grants will be routed in the following manner (using the folder with the IWT Routing Sheet as a cover, Attachment I) to ensure that all signatures are received:
 - FIRST, the two original grants will be given to the SC Works Greater Upstate Project

Director for signature;

- **SECOND**, the BSL or appropriate BST member will hold an orientation meeting for all companies receiving funding (separate meetings may be held in each county) to obtain Authorized Business Signatures* on the two original documents.

*Authorized Business Representatives must be executive-level company representatives (representatives with authority to sign a legally-binding document). Should an executive-level company representative designate authority to someone within the company, appropriate written notification signed by the executive must be included as an attachment to the grant documents.

11. Once all signatures have been obtained, the distribution of the documents will be as follows:

- **Application**

- ORIGINAL application to remain in the central file.
- COPY of the application must be sent to the SCDEW.

- **Grant**

- One (1) ORIGINAL grant (w/ a copy of the W9 form) will remain on file with the SC Works Greater Upstate Project Director.
- One (1) ORIGINAL grant (w/ a copy of the W9 form) will be given to the employer for their records.
- One COPY of the grant (w/ a copy of the W9 form) will be sent in the monthly report to SCDEW. This applies to any grants that have been received since the submission of the last report, and should only be reported once during the grant period.
- One COPY of the grant (w/ the original W9 form) will be kept by the BSL or BST member in the central file.
- One COPY of the W9 form will be given to the SC Works Accounting Department.
- Other copies and documentation may be incorporated by the SC Works operator at their discretion.

12. All company representatives who will assist in executing the grant requirements should receive training on the grant forms and requirements from BST members either during the orientation session or one-on-one. The BST member will supply all forms electronically. Applicable forms include:

- **Attachment J – Quarterly Report Packet**

- **Trainee Information Form**: to be completed by the business no later than the first day of training and again within five (5) days of the end of training.
- **Cumulative Expenditure Form**: to be completed by the business at the conclusion of training. All back-up documentation related to the training should be provided with the form and can include cancelled checks, paid

- invoices, paid registration information, and other documents (examples include invoices from the training institution, sign-in sheets, etc.).
- **Final Report Packet (Attachment P)**: to be completed once all grant funds have been expended or the grant period has expired (see number 16).

GRANT MANAGEMENT

13. The BST will manage each IWT agreement during the grant cycle. All staff responsible for grant management should review each statement of work and be knowledgeable of all company requirements.

Trainee Forms: Originals will be reviewed for accuracy and maintained in the central file. Trainee Forms are due within five (5) days of the start of a training program and again within five (5) days of the completion of the training program. The Trainee Form must have been received before reimbursement can be processed. Scanned copies are allowable.

Cumulative Expenditure Forms: Originals are required by the 5th of each month, regardless of whether expenses have been incurred. All backup documentation must be included with Cumulative Expenditure Forms to indicate that business payment has occurred to request reimbursement. Scanned copies are allowable.

14. Requesting Reimbursement:

Final payment may not be requested until all required documentation is received including the Final Report (Attachment P). A copy of the Final Report will be sent with the reimbursement request following the procedure outlined above.

The Cumulative Expenditure Form and back up documentation should be copied and remain in the central file with a notation that it has been submitted to the SC Works operator for reimbursement.

The signed Cumulative Expenditure Form and back up documentation (not to include trainee forms) should be sent to the SC Works Project Accountant for verification of the expenditures, prior to forwarding to the SC Works Project Director for signature. Once signed, the payment can be submitted to the SC Works accounting department for reimbursement.

Successful completion of the training program is required to reimburse the business; however, the BSL should thoroughly review the appropriate records to adjust the final reimbursement amount to account for any refund paid to the business because of cancellation of training program, if applicable. Payments per module is allowable.

15. Monitoring:

The respective BST member should monitor each IWT grant. The BST member should speak to at least one trainee participating in a training course once during the course of each training project. The BST member should speak to the company representative at least once during the course of the agreement to ensure that training is taking place and to ensure that the grant funds are being spent as indicated. This monitoring is in addition to the ongoing communication between the business and BST member on the status of the grant. The monitoring may be done on site or by phone. Areas for review can include:

- Instructor Wages/Tuition through documentation and invoices submitted
- Materials/supplies through documentation/invoices submitted
- Trainee wages - Trainee wages may not be used as part of the business matching amount

A monitoring report (Attachment K) should be placed in the central file.

16. Closing the grant:

Once the employer has expended the funds in their respective grant or the grant date has expired, the grant should be closed. Grants may also be closed if training has not occurred within one (1) month of the training outline and/or company has failed to follow the work statement. It is imperative that BST staff maintain detailed documentation of all communication with the employer in regards to their IWT agreement.

The top portion of the Final Report will be completed by the BST member and then sent to the employer for completion. The employer must sign the Final Report and submit the signed document to the BST. The original Final Report should remain in the central file.

17. Modifications:

Should changes occur during the life of the grant that require a modification, the attached Modification Request Form should be used (Attachment L).

Changes, other than requests for reduced or increased funding may be approved by the SC Works Project Director. These changes can include but are not limited to the following: changes to the end date (as long as the training can be completed by the end of the grant period), number of trainees, and line item changes (that do not result in overall funding change). It is the responsibility of the BSL to provide the appropriate Associate Director with a detailed explanation of the requested changes, as needed.

Changes to agreement end dates will ONLY be granted in cases where the BSL provides an explanation that the company has regularly communicated with the BST and the change in end date is a result of class cancellations or extenuating circumstances with the company. Proper documentation should be presented with the request.

An increase in the amount of funding for the grant must be presented and approved by the appropriate Board (or Executive Committee). The Associate Directors will provide the board's response to the BSL.

Once the modification has been approved, the BST member will print two original copies. The originals are then forwarded to the SC Works Project Director for signature. The BSL will then forward both originals to the employer for signature and the employer will be instructed to keep one original for their records and the other original should be returned to the BST. One original modification will be kept in the central file, and one copy will be sent with the monthly report to the SCDEW.

18. Allocation of un-used funding:

If at any point during the grant period, any previously allocated funds are recaptured (recapturing will occur for any unused funds at the close of each company's grant), the BSL will execute new grants following the ranked order list previously approved. If all training has been funded, an application period will be reopened following the procedure outlined above. An exception may be made to the amount of time allowed for applications to be received so that approval can occur before the end date of the grant.

19. Reporting and filing procedures:

An IWT quarterly report (Attachment J) is due quarterly to the SCDEW. The report should include:

- New agreements including application, "grant packet," and W9;
- Cumulative Expenditure Reports (not including back up documentation) that have been received since the submission of the last report;
- Final Reports; and
- Modifications (including budget modification if required)

Should there be zero expenditures, written communication from the BSL to the appropriate SCDEW and Board staff can be submitted in lieu of the report.

Central File - There should be a central file for each company awarded a grant, including all of the information below:

- A COPY of the application received during solicitation;
- The ORIGINAL grant agreement with each company;
- Trainee Information Forms;
- Cumulative Expenditure Forms and back up documentation;
- Final Reports;
- Monitoring Reports;
- Related communication regarding IWT grant, as needed; and
- ORIGINAL of Modifications.

There should be a binder of ORIGINAL applications and minutes from the review committee meeting available for monitoring.

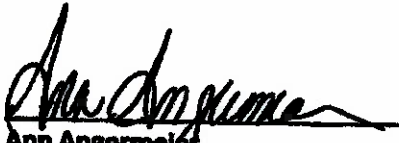
Employer Documents – The BST will assist employers in maintaining their own file that will include:

- COPY of application,
- ORIGINAL Grant agreement documents,
- ORIGINAL Modifications, and
- COPY of the Final Report.
- COPY of trainee forms, cumulative expenditures, and back up documentation to include employee records documenting six month employment requirement.

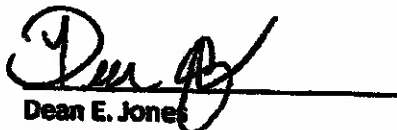
ALL IWT files should be kept and accessible for monitoring for three years after the end date of the agreements.

Additional requirements per State Instruction Number 17-03: There are additional requirements included in State Instruction 17-03. Currently, the intent and language of those requirements is unclear. Assistance has been requested for how to put those requirements into practice. Further instruction will be given at such time as additional guidance has been provided to the Local Areas. Once guidance is received, staff may need to obtain more information from employers.

INQUIRIES: Should you have any questions regarding this instruction, please contact Eva Anagnostis at 864-467-8142, TTY: 711, or at eanagnostis@greenvillecounty.org Dana Wood at 864-596-2028 ext. 100, TTY: 711, or at wood@upstaterworkforceboard.org.



Ann Angermeyer
Executive Director
Upstate Workforce Board



Dean E. Jones
Executive Director
Greenville County Workforce Development Board

Source: State Instruction Notice 17-03
REPLACES LOCAL UPSTATE INSTRUCTION LETTER 14-03

Self Sufficiency

Information submitted for a single person, renting a one bedroom apartment in the Spartanburg area.

| | |
|----------------------------------|------------|
| Rent/Mortgage | \$650.00 |
| Property Taxes/Insurance | \$25.00 |
| Food | \$200.00 |
| Utilities: Water, Gas Electric | \$160.00 |
| Phone: Home/Cell | \$75.00 |
| Internet | \$50.00 |
| Car Payments | \$180.00 |
| Fuel for Vehicles | \$100.00 |
| Auto Property Taxes | \$15.00 |
| Auto Insurance | \$100.00 |
| Medical Bills (currently paying) | \$25.00 |
| Medications | \$10.00 |
| Health Insurance | \$100.00 |
| Clothing | \$50.00 |
| Personal Expenses | \$80.00 |
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| | |
| | |
| Total | \$1,820.00 |

Based on this monthly list of expenses, that represents the net income needed since about 25% of the gross income would go to taxes. This would then require an annual income of \$29,120 to cover these expenses, or \$14 per hour full time.

Personal Budget Based on \$12.00/hour at 40 hours/week

| | |
|------------------------------------|--------------------|
| Net Income: | \$ 1,540.40 |
| Rent | \$ (630.00) |
| Utilities | \$ (95.00) |
| Cell Phone | \$ (25.00) |
| Internet | \$ (35.00) |
| Vehicle Ins | \$ (50.00) |
| Vehicle Maint/Rep | \$ (50.00) |
| Gas | \$ (150.00) |
| Health Ins | \$ (150.00) |
| Med Copays | \$ (6.00) |
| Groceries & Incidentals | \$ (300.00) |
| Clothing | \$ (50.00) |
| Remaining Funds | \$ (0.60) |

UPSTATE WORKFORCE BOARD YOUTH COMMITTEE MEETING Committee Summary

| | |
|--|--|
| Meeting Date | February 7, 2018 |
| Contact for Questions and Concerns | <p>Mr. Curtis Anderson - 864.205.9824 Email: cnanderson1984@gmail.com</p> <p>Mrs. Vicki Lawson 864.596.2028 Email: lawson@upstaterworkforceboard.org</p> |
| Significant Items and Issues Raised | <ul style="list-style-type: none"> • Financial Update • Work-based Learning • Grant Modification • Youth Program Reports/Dashboards (ACHIEVE Program & The YouthStop) • Youth RFP • SC Chamber Update • Committee Focus Ideas |
| Action Taken | Discussion |
| Results and Outcomes | <p><u>Financials</u> Mr. Brent Bishop reviewed the ACHIEVE and YouthStop program budgets through December 2017. Mr. Bishop stated that both programs are tracking on schedule. Chairman Anderson asked why ACHIEVE's Operating Expenses are only at 2.61%. Mr. Bishop and Ms. Wood explained there is a delay in billing/invoicing on the USC side of the process and that it will be reflected on the next meeting's reports.</p> <p><u>Work-based Learning Update</u> Mr. Bishop stated that both programs are tracking well through December 2017. The usage percentage is 9.31% as of December 2017. At this point, 10% is the goal, so it is tracking slightly under.</p> <p><u>Grant Modification</u> Mr. Bishop presented the modification request from ACHIEVE. He explained the modification request includes line item shifts and the allocation of unobligated funds in the amount of \$2,368.75 Those funds will be used to offset the increase in the 2017 Infrastructure Funding Agreement related to co-location in SC Works Spartanburg. A poll vote was conducted after the meeting due to low attendance.</p> <p><u>Youth Program Reports/Dashboards</u> Ms. Kathy Bell, Director of The YouthStop, reviewed the <i>Just in Time</i> and <i>Dashboard</i> reports for December 2017, highlighting being at 85% of enrollment. YouthStop has experienced some TABE delays due to transitions in the TABE testing process. They have 8 participants engaged in forklift training and 6 in driver's education training. 6 participants are currently in work experience. Total enrollment is at 47 with a projected enrollment of 56.</p> <p>Ms. Helen Merriweather, Director of USC Upstate ACHIEVE Program, reviewed the <i>Just in Time</i> and the <i>Dashboard</i> for December 2017. She stated that the program is at 70% enrollment with plans to serve between 60-65 students this program year. Six GEDs have been issued. Twelve participants have only 1 of the 3 GED tests remaining to be passed. She reported that 2nd quarter outcomes are also on target.</p> |

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| | <p><u>Youth RFP</u> Ms. Wood explained the law requires competitive solicitation for program providers every 3 years and that this year is a solicitation year. She explained that the Youth Committee is responsible for reviewing, scoring proposals and making a recommendation to the full board regarding WIOA Youth program providers.</p> <p><u>SC Chamber Update</u> Ms. Wood informed the group that she and staff from R.D. Anderson are working to address the interpretation the HR community has regarding child labor laws as it relates to student learner opportunities. Meetings have been held with the SC Chamber and SC Department of Commerce on the topic. Two goals at this time are to work with the local delegation to introduce a new bill with language that provides clarification on gray areas and to create an endorsement from several state leaders with the benefits and simple language of what is legal and allowable. This change could create a talent pipeline for local industry. We know this is a statewide issue and that is why we are working with Columbia. We are hopeful our efforts will impact the whole state of South Carolina.</p> <p><u>Committee Focus Ideas</u> Ms. Lawson explained that she will now be the staff member assigned to the Youth Committee due to Ms. Simone Mack- Orr's increasing workload with profiles and employer engagement. In an effort to better serve the youth, there are plans to overhaul the youth committee. After doing research, Ms. Lawson identified and shared several focus ideas for consideration. These ideas include: Parent career engagement/parent panels, promotion of manufacturing/construction careers, and youth focus panels. Ms. Lawson shared that the UWB would like to begin discussions about hosting a construction career fair like what has been done in the past.</p> <p><u>Other Business</u> There was no other business.</p> |
| Items Referred for Board Action | The Youth Committee recommends the ACHIEVE budget modification be approved by the board as presented. |
| Website Reference | www.upstateworkforceboard.org |



AGENDA
YOUTH COMMITTEE MEETING
February 7, 2018
8:30 a.m.
YouthStop

- Welcome Mr. Curtis Anderson
- Financial Update Mr. Brent Bishop
- Work-based Learning Mr. Brent Bishop
- Grant Modification Mr. Brent Bishop
- Youth Program Reports/Dashboards
 - USC Upstate ACHIEVE Program
 - The YouthStop
- RFP Planning Ms. Dana Wood
- SC Chamber Update Ms. Dana Wood
- Committee Focus Ideas Ms. Vicki Lawson
 - Parent Career Engagement
 - Promotion of Manufacturing/Construction Careers
 - Youth Focus Panels
- Other Business & Adjourn

Next Meeting Date: April 18, 2018

Our Mission Statement:
Build and maintain a workforce development system that meets the needs of employers.

ACHIEVE
Profit & Loss Budget vs. Actual
July through December 2017

| ACHIEVE | | | | | |
|---------------------------------|-------------|--------------|------------|----------------|-------------|
| | 50% of PY17 | Jul - Dec 17 | Budget | \$ Over Budget | % of Budget |
| Income | | | | | |
| Grants Received | | 364,476.00 | 364,476.00 | 0.00 | 100.0% |
| Total Income | | 364,476.00 | 364,476.00 | 0.00 | 100.0% |
| Expense | | | | | |
| Indirect Costs | | 10,398.93 | 20,905.46 | -10,506.53 | 49.74% |
| Instructional Trng. & Sup. Svs. | | 5,672.10 | 43,030.21 | -37,358.11 | 13.18% |
| Operating Expenses | | 797.49 | 30,592.08 | -29,794.59 | 2.61% |
| Staff Salaries & Fringe Benefit | | 123,517.30 | 253,533.25 | -130,015.95 | 48.72% |
| Work Based Learning | | 3,460.63 | 16,415.00 | -12,954.37 | 21.08% |
| Total Expense | | 143,846.45 | 364,476.00 | -220,629.55 | 39.47% |
| Net Income | | 220,629.55 | 0.00 | 220,629.55 | 100.0% |

YouthStop
Profit & Loss Budget vs. Actual
July through December 2017

| YouthStop | | | | | |
|---------------------------------|-------------|-------------------|-------------------|--------------------|---------------|
| | 50% of PY17 | Jul - Dec 17 | Budget | \$ Over Budget | % of Budget |
| Income | | | | | |
| Grants Received | | 417,630.17 | 417,630.17 | 0.00 | 100.0% |
| Total Income | | 417,630.17 | 417,630.17 | 0.00 | 100.0% |
| Expense | | | | | |
| Instructional Trng. & Sup. Svs. | | 5,479.49 | 20,158.50 | -14,679.01 | 27.18% |
| Operating Expenses | | 39,785.18 | 75,161.23 | -35,376.05 | 52.93% |
| Staff Salaries & Fringe Benf. | | 148,985.80 | 307,310.44 | -158,324.64 | 48.48% |
| Work Based Learning | | 1,422.25 | 15,000.00 | -13,577.75 | 9.48% |
| Total Expense | | 195,672.72 | 417,630.17 | -221,957.45 | 46.85% |
| Net Income | | 221,957.45 | 0.00 | 221,957.45 | 100.0% |

| UWB Work-based Learning Requirement | | 7/31/2017 | 8/31/2017 | 9/30/2017 | 10/31/2017 | 11/30/2017 | 12/31/2017 | Total | |
|-------------------------------------|---------------------|-------------|-------------|--------------|-------------|--------------|-------------|--------------|--------|
| PY17 Youth Allotment | \$ 818,631.00 | | | | | | | \$ 3,460.63 | 21.08% |
| 20% Requirement for Work Experience | \$ 163,726.20 | | | | | | | \$ 35,976.37 | 60.83% |
| ACHIEVE budget for: | | | | | | | | | |
| Work Experience/Training | \$ 16,415.00 | | | | | \$ 1,152.00 | \$ 2,308.63 | \$ - | |
| Staff Salary/Fringe | \$ 59,138.83 | | | \$ 17,539.49 | \$ 5,802.96 | \$ 6,128.81 | \$ 6,505.11 | \$ - | |
| OJT | | | | | | | | \$ - | |
| Pre-apprenticeship | | | | | | | | \$ - | |
| Job Shadowing | | | | | | | | \$ - | |
| | <u>\$ 75,553.83</u> | | | | | | | | |
| YouthStop budget for: | | | | | | | | | |
| Work Experience | \$ 15,000.00 | | | | | \$ 256.50 | \$ 1,165.75 | \$ 1,422.25 | 9.48% |
| Out - CDS Wages & Fringes | \$ 78,705.56 | \$ 2,122.47 | \$ 5,561.56 | \$ 6,868.94 | \$ 7,799.88 | \$ 7,395.77 | \$ 5,590.18 | \$ 35,338.80 | 44.90% |
| OJT | | | | | | | | \$ - | |
| Pre-apprenticeship | | | | | | | | \$ - | |
| Job Shadowing | | | | | | | | \$ - | |
| | <u>\$ 93,705.56</u> | | | | | | | | |
| Total Currently Budgeted | \$ 169,257.39 | | | | | | | | |
| Remaining Needed | \$ (5,531.19) | \$ 2,122.47 | 0.28% | \$ 5,561.56 | 0.94% | \$ 14,933.08 | 5.58% | \$ 15,569.67 | 7.41% |
| | | | | | | | | \$ 76,198.05 | 9.31% |

SC WORKS UPSTATE GRANT MODIFICATION REQUEST FORM

ACHIEVE PROGRAM

Date: 2/1/2018

Grant number: 17Y603C4-UWB Modification #1

Change(s) requested (note which section(s) of the original grant are to be changed, then state the new wording to reflect those changes):

OPERATING EXPENSES (PG 3)

PREMISES RENT/PHONES/OTHER (LINE ITEM 5)

INCREASE BY \$2,368.75 (FROM \$22,807.08 TO \$25,175.83);

THIS INCREASES THE OVERALL BUDGET BY \$2,368.75,

**WITH OPERATING EXPENSE INCREASING FROM \$30,592.08 TO \$32,960.83 AND
THE OVERALL BUDGET INCREASING FROM \$364,476 TO \$366,844.75.**

Reason for modification:

The request to increase funds under OE Premises Rent/Phones/Other is due to an increase in this area after the MOU/IFA was finalized. The understanding is that the UWB will provide the fund to cover the additional \$2,368.75 for the current PY17 year. For PY18 budget, ACHIEVE will cover the MOU/IFA amount, which will be known before the budget is completed for PY18 since PY18 MOU/IFA discussions are beginning in February 2018.

OPERATING EXPENSES (PG 3)

PROFESSIONAL DEV (LINE 13)

DECREASE BY \$1,000 (FROM \$1,450 TO \$450)

AND MOVE TO

OFFICE SUPPLIES (LINE 1)

INCREASE BY \$1,000 (FROM \$2,500 TO \$3,500)

Reason for modification:

Staff will not be attending the Spring SETA conference as planned, so the amount is reallocated to Office Supplies (which was decreased by \$3,400 from the previous year).

SUPPORTIVE SERVICES (PG 4)

C. OTHER TRAINING ACTIVITIES

4. GRADUATION COSTS

DECREASE BY \$1,600 (FROM \$1,600 TO \$0)

AND MOVE TO

C 3: SUPPLIES/MATERIALS (CLASSROOM)

INCREASE \$1,600 (FROM \$6130 TO \$7,730)

Reason for modification:

Each year, funds are allocated for Graduation Costs. ACHIEVE has decided to have graduation after the program year ends, in August or September. These funds will be reallocated to Supplies/Materials for the classroom. There is no overall increase in Supportive Services, and this reallocation does not affect the overall budget amount.

For questions regarding this modification request, please contact:

NAME: Helen Merriweather
TITLE: Director
EMAIL: hmerriweather@uscupstate.edu
PHONE: 864-764-1971

SUBMIT COMPLETED FORM TO:
UPSTATE WB ONESTOP SERVICES COORDINATOR

DASHBOARD

(Rolling Progress)

| | 1st Quarter | | | 2nd Quarter | | | 3rd Quarter | | | 4th Quarter | | | TOTAL |
|-----------------------------------|-------------|-----|-----|-------------|-----|-----|-------------|-----|-----|-------------|-----|-----|-------|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | |
| # Of informational contacts | 25 | 41 | 97 | 46 | 32 | 16 | | | | | | | 240 |
| # Of applications received | 3 | 2 | 10 | 3 | 4 | 3 | | | | | | | 25 |
| # Of academically eligible | 3 | 2 | 10 | 3 | 4 | 2 | | | | | | | 24 |
| # Of eligible WIOA applicants | n/a | 0 | 5 | n/a | 3 | 2 | | | | | | | 10 |
| # Of referrals to other agencies | 2 | 6 | 0 | 3 | 0 | 4 | | | | | | | 15 |
| # Of carryovers (Prev. Yr or Mo) | n/a | 36 | 38 | 38 | 43 | 44 | | | | | | | 44 |
| # Of new enrollments | 0 | 0 | 2 | 5 | 1 | 2 | | | | | | | 10 |
| % Of Enrollment Benchmark | n/a | 65% | 69% | 76% | 80% | 84% | | | | | | | 84% |
| Total active end of month | 36 | 36 | 38 | 43 | 44 | 46 | | | | | | | 46 |
| # Of exiters entering follow-up | 0 | 0 | 0 | 14 | 0 | 0 | | | | | | | 14 |
| # Placed in empl/college/adv trng | 13 | 7 | 4 | 12 | 0 | 0 | | | | | | | 36 |
| # Of diploma's earned | 0 | 0 | 0 | 13 | 0 | 3 | | | | | | | 16 |
| # WorkKeys platinum earned | 0 | 0 | 0 | 0 | 0 | 0 | | | | | | | 0 |
| # WorkKeys gold earned | 0 | 0 | 0 | 0 | 0 | 0 | | | | | | | 0 |
| # WorkKeys silver earned | 0 | 3 | 1 | 3 | 4 | 0 | | | | | | | 11 |
| # WorkKeys bronze earned | 0 | 0 | 0 | 0 | 0 | 2 | | | | | | | 2 |

Total Served YTD 46 Carry-overs plus New Enrollments

| Cost Category | Budget | YTD | | YTD | YTD |
|-------------------------------|-------------------|-------------------|--------|------------|------------|
| | | Expense | Actual | Goal | Actual |
| Staff | \$ 228,607 | \$ 113,648 | | 50% | 50% |
| Operating | \$ 75,161 | \$ 39,785 | | 50% | 53% |
| Instructional Training | \$ 10,990 | \$ 4,859 | | 50% | 44% |
| Work Based Learning | \$ 93,704 | \$ 36,761 | | 50% | 39% |
| Supportive Service/Incentives | \$ 9,169 | \$ 620 | | 50% | 7% |
| Total | \$ 417,631 | \$ 195,673 | | 50% | 47% |

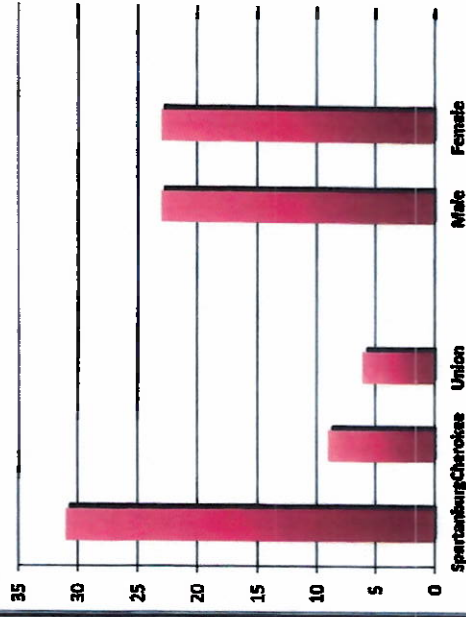
Invoices through: 12/31/2017

Please note: District No. 6 does not charge for indirect costs.

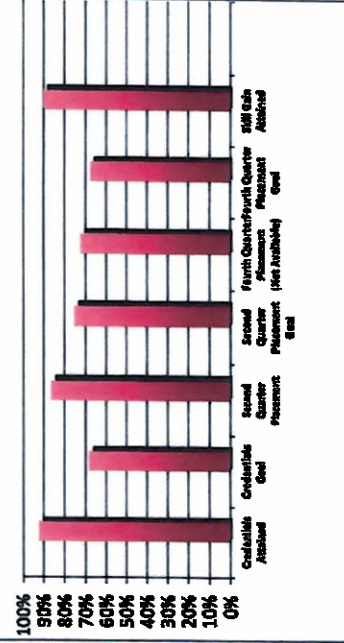
Funded by the Upstate Workforce Board--Administered by Spartanburg County School District No. 6



The YouthStop™ Demographics



Performance



Odds 'n Ends



Sam Etheredge, social worker at The YouthStop™, led a group session focusing on "Creating Your Brand" at Dorman High School. The topic focuses attention on how individual decisions and choices work together to create a personal "brand." Participants are encouraged to be intentional in creating a brand that reflects responsibility, work ethic and honesty.

Three new participants were certified in November and December.

On November 10, 2017, a group of participants visited Lander University in Greenwood, SC. The group toured the entire campus, and meet with admissions and financial aid staff to discuss the application and enrollment process.

Workshops continued during

the last two months of the year and focused on soft skill development and workplace interactions.

Work readiness training was offered and work experience placements continued. Currently, participants are placed at Elite Dance Academy, James M. Cudd CPA, Spartanburg School District No. 6, and Smokin' Wings. If you know of a business or non-profit willing to host a work experience, please contact Shannon Wilkins at 864-583-4433 for a consultation.



As part of the Connect to College through Community program, participants at The YouthStop™ tour local colleges and technical programs to get firsthand knowledge of the course offering, academic requirements and enrollment procedures. This program year participants have toured Greenville Technical College, Spartanburg Community College, Spartanburg Methodist College and Lander University.

Staff Development

Kathy E. Bell attended the Youth Committee meeting on December 6, 2017. The meeting was held at The YouthStop™ and included discussions on work experience and recent programmatic audits.

On December 11, 2017, Craig Jacobs, Upstate Workforce Board member, visited The YouthStop™ site and met with staff members to discuss programming. Two participants also attended the meeting and answered questions from the client perspective. Discussion centered on staff responsibilities, building usage and programs.

The YouthStop™ staff attended a staff retreat to plan for the 2018 spring semester on December 18, 2017. Items for discussion included SCWOS updates, job shadowing, work experience options, and work readiness training.

The YouthStop™
Where Academic Preparation and Career Readiness Meet

360 East Main Street

Spartanburg • South Carolina • 29304

864.583.4433 • 864.583.4080 (T) • TTY:711

"An equal opportunity employer/program"

"Auxiliary aids and services available upon request to individuals with disabilities"

USC Upstate ACHIEVE Program
Progress Report PY17
July 1, 2017--June 30, 2018

12/31/2017

| | 1st Quarter | | | 2nd Quarter | | | 3rd Quarter | | | 4th Quarter | | | TOTAL |
|--------------------------------------|-------------|-----|-----|-------------|-----|-----|-------------|-----|-----|-------------|-----|-----|-------|
| | JUL | AUG | SEP | OCT | NOV | DEC | JAN | FEB | MAR | APR | MAY | JUN | |
| Attended Orientation (FOC) | 5 | 8 | 0 | 10 | 9 | 0 | | | | | | | 44 |
| Pending Applications | 4 | 4 | 4 | 3 | 3 | 4 | | | | | | | 22 |
| Eligible WIOA Applicants | 2 | 3 | 3 | 3 | 2 | 3 | | | | | | | 16 |
| Referrals to other agencies | 8 | 7 | 6 | 4 | 4 | 5 | | | | | | | 34 |
| Carryover (Prev. Yr) | 23 | NA | NA | 40 | NA | NA | | | | | | | NA |
| New Enrollments | 1 | 2 | 2 | 3 | 3 | 1 | | | | | | | 20 |
| New enrollments BSD--rdn and/or math | 1 | 1 | 2 | 3 | 3 | 0 | | | | | | | 10 |
| Total Active End of Quarter | NA | NA | 35 | NA | NA | 37 | | | | | | | NA |
| Total Served (New, CO) | 25 | 31 | 43 | 36 | 39 | 40 | | | | | | | NA |
| Exiters entering Follow-up 2nd/4th | 0 | 0 | 15 | 0 | 0 | 13 | | | | | | | 28 |
| Placed in Empl/College/Adv Trng | 0 | 0 | 10 | 0 | 0 | 12 | | | | | | | 22 |
| GEDs Earned | 2 | 1 | 0 | 1 | 0 | 2 | | | | | | | 6 |
| Occupational Credentials Earned | 20 | 0 | 4 | 0 | 0 | 0 | | | | | | | 24 |
| Attaining L/N in at least 1 subj | 0 | 1 | 1 | 1 | 1 | 2 | | | | | | | 6 |
| WorkKeys Earned | 1 | 1 | 2 | 1 | 2 | 2 | | | | | | | 9 |
| Résumés | 3 | 3 | 1 | 2 | 3 | 3 | | | | | | | 15 |
| Work Experiences Completed | 1 | 0 | 0 | 1 | 1 | 1 | | | | | | | 4 |
| Driver's Ed | 0 | 0 | 0 | 0 | 0 | 1 | | | | | | | 1 |

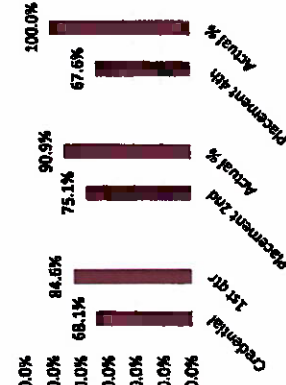
Exiters entering Follow-up in the total for 2nd and 4th quarters. Placement is recorded at end of quarter.

12/31/2017

| Cost Category | Budget | YTD Expense | YTD % |
|---------------------|----------------------|---------------------|---------------|
| Staff/Fringe | \$ 198,775.07 | \$ 87,540.93 | |
| Operating | \$ 30,592.08 | \$ 797.49 | |
| Indirect | \$ 16,524.81 | \$ 7,520.82 | |
| Instructional Trng | \$ 13,550.00 | \$ 4,198.00 | |
| Supportive Services | \$ 29,480.21 | \$ 1,274.48 | |
| Work-Based Learning | \$ 75,553.83 | \$ 42,315.11 | |
| Total | \$ 364,476.00 | \$143,646.83 | 39.00% |

PY17

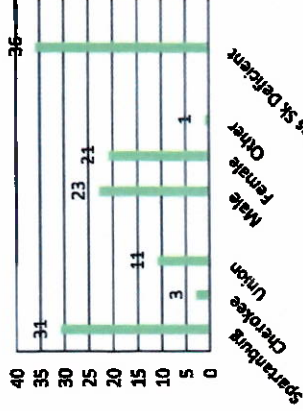
(Oct 1, 2017-- Dec 31, 2017)



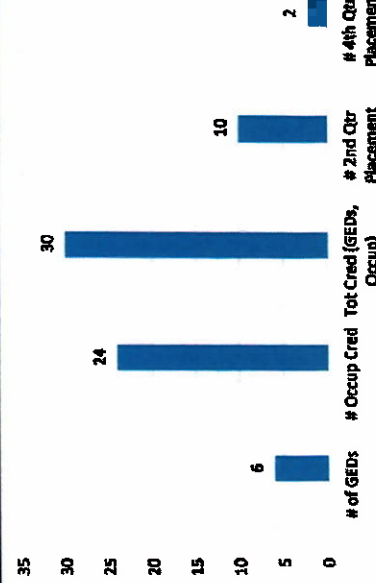
WIOA Measures are preliminary and based on applicable quarters.

Demographics of Total Served--45
(Follow-up not included)

PY17
7/1/17--01/10/2018



This chart includes students that cannot be counted in carryover but still being actively served--new, carryover and carryover not counted are included.



Year to Date: Participants may have more than one credential, but only one is counted per participant in outcome. All credentials are reflected here.



A Program of the Upstate Workforce Development Board
Serving Cherokee, Spartanburg and Union
www.upstateworkforceboard.org

December 1, 2017—December 31, 2017

PARTICIPANT LEADERSHIP DEVELOPMENT

- The participants have been busy developing résumés and practicing workplace skills, including WorkKeys. They are preparing for Job Internships and learning soft skills.
- The counselors, Brad Peterson, Cheryl Owens and Jayna Patel, continued group and individual counseling throughout the month.
- Students and staff continued the community based service through delivering Mobile Meals. Students delivered their special project to each MM recipient.

STAFF DEVELOPMENT

- Dec 5—Staff met with Craig Jacobs, longstanding Upstate Workforce Board member, and gave overview of program and discussed ways that Mr. Jacobs can volunteer services.
- Dec 6—Helen Merriweather attended the Upstate Workforce Board Youth Committee meeting to discuss projects and updates.
- Dec 8—Ranee Standberry and Helen Merriweather attended the Spartanburg Youth Council December breakfast. Networking was rampant.
- Dec 14—Helen Merriweather attended the SC Works MOU/IFA meeting for updates on shared resources.
- Dec 18—Helen Merriweather sits on the Mary Black Foundation CAB grant committee. She attended the end of year luncheon and participated in roundtable discussions and action items.
- Dec 19—The ACHIEVE staff enjoyed a holiday breakfast together at Denny's.
- Dec 20—SC Works, SCDEW and ACHIEVE sponsored a family for which to buy Christmas gifts. The gifts were delivered to the family of three children.

Pre-Enrollment testing and WIOA Orientation
every Thursday at 12:30pm at ACHIEVE location.

Cherokee and Union County testing by appointment: Call to schedule.

ACHIEVE is
co-located with SC Works Spartanburg at the
SCC Downtown Campus.

<https://www.uscupstate.edu/outreach/achieve/>

Just In Time Report

GED Math and Physics: Hands-On

GED preparation is somewhat streamlined and often the main sources of study are the books and the computer. The ACHIEVE GED instructor decided to allow the students to engage in a project where they used skills in measuring, team-work and creativity. They were provided supplies and told to turn the classroom door into a fireplace scene. They had to measure with accuracy and uniformity. The students used soda boxes glued together for the mantel. They had to figure how to make the mantel stay in place and not droop, using water bottles, working in some physics concepts. The door became rather personal as they added their own cut-out stockings. The Center employees noticed the originality and the depth created.



2nd Quarter Outcomes Oct 1, 2017—Dec 31, 2017

Credentials_____Goal-----68.1%
Actual---84.6%

2nd Qtr Placement____Goal-----75.1%
Actual---90.9%

4th Qtr Placemnt____Goal-----67.6%
Actual----100%

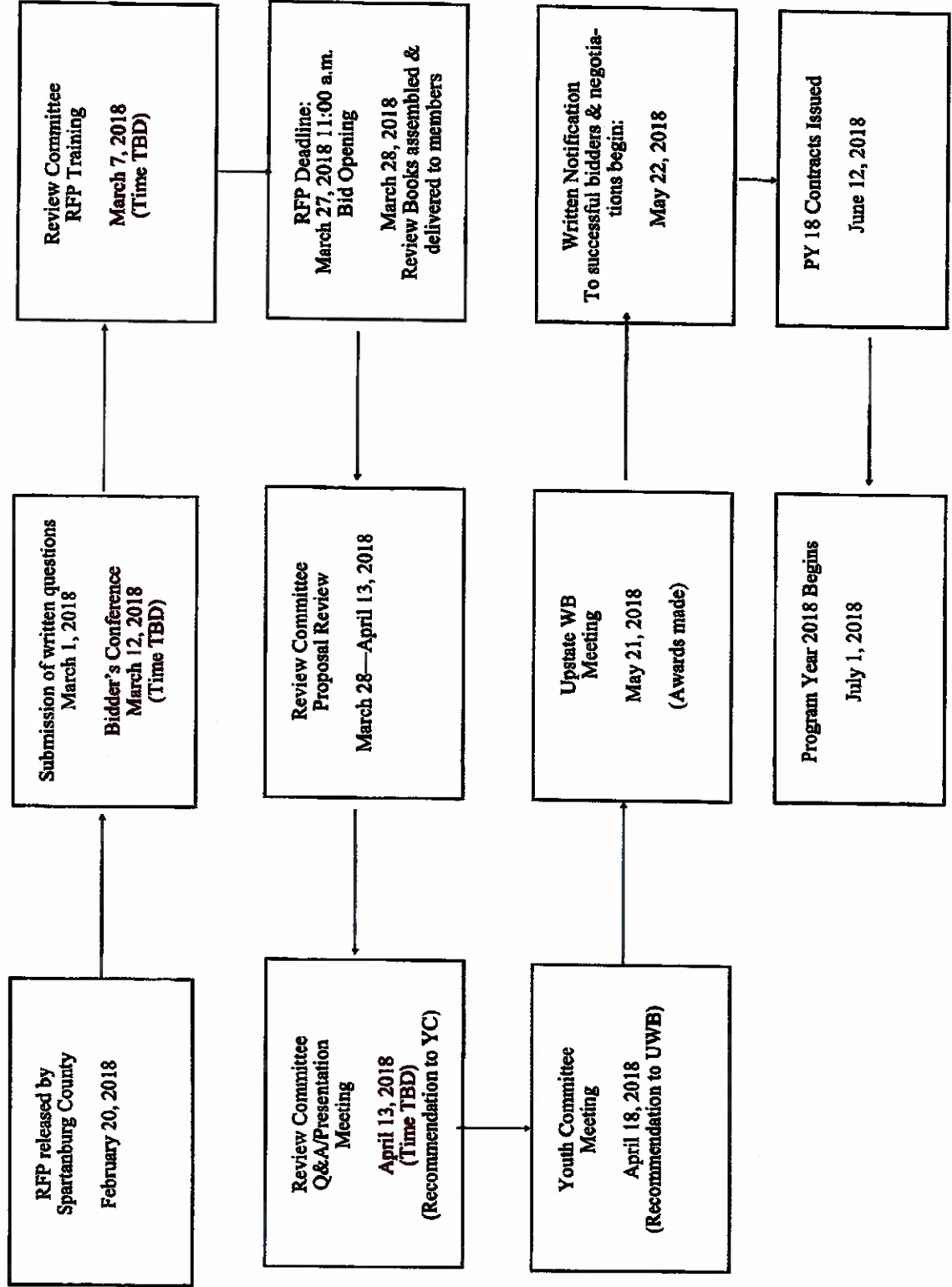
While the Upstate Workforce Board funds ACHIEVE, ACHIEVE is administered by USC Upstate. Upstate oversees the grant and operates as ACHIEVE's fiscal agent.

UPSTATE

Issue
J. I. T. PY 17 6

December 2017

2018 WIOA Youth Request for Proposals Review Process



**UPSTATE WORKFORCE BOARD
DISABILITIES COMMITTEE MEETING
Committee Summary**

| | |
|---|--|
| Meeting Date | February 22, 2018, at 8:30 a.m. |
| Contact for Questions and Concerns | <p>Ms. Jennie Thomas, Committee Chair – 864.249.8030 Email: jthomas@scvrd.state.sc.us</p> <p>Ms. Dana Wood – 864.596.2028 Email : wood@upstateworkforceboard.org</p> |
| Action Taken | <i>Discussion and Planning</i> |
| Results and Outcomes | <p><u>Welcome and Introductions</u></p> <ul style="list-style-type: none"> Ms. Jennie Thomas, Committee Chair, welcomed committee members. <p><u>ADA Facility Review Reports</u></p> <ul style="list-style-type: none"> Ms. Dana Wood discussed the recent ADA compliance evaluation of all the Upstate facilities per SCDEW request (by Instruction letter). This review was performed by ABLE SC. There were issues from each location. Ms. Thomas suggested utilizing rehab engineers for second opinions on costly items. Ms. Wood stated the full reports are available via email upon request. <p><u>Event Planning/Ad Hoc Committee Assignments/Updates</u></p> <ul style="list-style-type: none"> The committee discussed this year's event with Invisible Disabilities being the targeted theme. The event will be held on Friday, May 11, 2018, at the Spartanburg Community College Tyger River Campus. Lunch will be delivered by 11:30 a.m. and the panels will begin promptly at 12:00 p.m. Committee members agreed to host a panel of experts in the following focus areas: PTSD (Veterans), Intellectual Disabilities, Asperger's/Autism and Depression/Anxiety. Speakers will be: <ol style="list-style-type: none"> Intellectual Disabilities: Dr. Joe Ryan, Clemson LIFE; Asperger's/Autism: Ms. Lisa Thomas will ask Dr. Ryan to speak to this also. PTSD: Dr. Craig Burnett Anxiety/Depression: Lorell Gordon Occupational Therapy: Lorell Gordon and Tanya Lambert from SCVRD Ms. Wood stated that this year, the cost of lunch will be covered by the UWB, but a business sponsor for \$250 is needed to cover the cost of the moderator, Mr. Chuck Ewart. All presenters will receive a gift bag of items. Committee members were asked to send contact information to Ms. Wood for any guests requested. Invitations will be electronic to allow tracking of RSVPs. Ms. Wood requested speaker bios from those who will be presenting so that she may compile them in the packet and also to request HRCI credits for the attendees. Ms. Wood will create a checklist of tasks for which committee members may sign up. She also requested a committee member volunteer to be the point of contact for vendors. Vendors suggested are: Vocational Rehabilitation, Charles Lea, Veterans Administration, ABLE SC, Project HOPE, SHRM, Forrester Center, Greer Mental Health, and Project SEARCH. <p><u>Other Business and Adjourn</u> With no further business, the meeting was adjourned at 9:40 a.m.</p> |
| Items Referred for Board Action | None |
| Website Reference | www.upstateworkforceboard.org |



**Upstate Workforce Board
Disabilities Committee Meeting**

February 22, 2018

8:30 a.m.

The Bryant Center

Facilitated by Ms. Jennie Thomas, Committee Chair

8:30 AM

Welcome & Introductions

8:40 AM

ADA Facility Review Reports

9:00 AM

Event Planning/Ad Hoc Committee Assignments/Updates

9:25 AM

Other Business and Adjourn

Next Meeting Date:

April 26, 2018