

## PERFORMANCE REVIEW COMMITTEE

**March 21, 2023**

**11:30 AM**

BCDCOG

Barrett Lawrimore Conference Room

5790 Casper Padgett Way

North Charleston, SC 29406

Join Zoom Meeting

<https://us02web.zoom.us/j/87687584017>

Meeting ID: 876 8758 4017

Passcode: 073308

## AGENDA

- I. Call to Order/Introductions
- II. Approval of Meeting Notes: January 31, 2023
- III. Review and Approve the Rating Sheet Criteria
- IV. Discuss Training Cap Increase
- V. Performance Reports:
  - A. Scorecard
  - B. Dashboard
  - C. OJT Reports
- VI. Other Business
- VII. Adjourn

**TRIDENT WORKFORCE DEVELOPMENT BOARD**  
**PERFORMANCE REVIEW COMMITTEE**

January 31, 2023

**Meeting Notes**

The Trident Workforce Development Board (TWDB) Performance Review Committee met on Tuesday, January 31, 2023 at 11:30 a.m. via Zoom and in-person at the Berkeley-Charleston-Dorchester Council of Governments Barrett Lawrimore Conference Room located at 5790 Casper Padgett Way in North Charleston, South Carolina.

**MEMBERSHIP:** Mendi Arnold; Jenny Bing; Janet Cappellini; Natasha Chatman; Butch Clift; Wendy Courson; Dottie Karst; Jessica Lewis; Don Smith

**MEMBERS PRESENT:** Janet Cappellini; Dottie Karst; Jessica Lewis; Don Smith

**OTHERS PRESENT:** Brent LaPlante (Ross IES)

**BCDCOG STAFF:** Sharon Goss; Kameron Alston; Kim Coleman

**I. Call to Order/Introductions/Quorum Determination**

Due to Chairman Clift's absence, Ms. Janet Cappellini presided. Ms. Cappellini called the Performance Review Committee meeting to order at 11:30 a.m. Excused absentees were submitted, introductions were made and a quorum was determined.

**II. Approval of the January 11, 2022 Meeting Notes**

*Mr. LaPlante made a motion to approve the January 11, 2022 Meeting Notes as presented.*

*Mr. Smith seconded the motion. The motion was unanimously approved.*

**III. Review Criteria for Approval (Scorecard)**

Sharon Goss, Workforce Development Director, discussed the purpose of the Performance Review Committee, noting that it is a "working committee." Ms. Goss stated that the Performance Review Committee is a specially-formed committee that was established by the Trident Workforce Development Board to review the performance of Eligible Training Providers and the WIOA Program Service Provider. Ms. Goss addressed questions and comments and turned the meeting over to Kameron Alston, Performance Outcomes Coordinator. Ms. Alston presented a Program Denial letter. She discussed the letter in detail noting that the provider does not meet all criteria for the program. Ms. Alston addressed questions and comments. It was the consensus of the Performance Review Committee to concur with the Program Denial letter.

*Ms. Karst made a motion to approve the Scorecard Criteria (Program Denial Letter) as presented.*

*Ms. Lewis seconded the motion. The motion was unanimously approved.*

**IV. Review Eligible Training Provider Performance Information: Scorecard**

Ms. Goss discussed the Eligible Training Provider Performance Scorecard. She discussed each category in detail as well as the rating and weight. She noted that, at the next meeting, the scorecard will be discussed in detail as well as the training cap and the location criteria (i.e.: local; online; out-of-state). Ms. Goss addressed questions and comments. The Performance Review Committee received the Eligible Training Provider Performance Information Review as information.

**V. Performance Reports:**

**A) Dashboard:** Ms. Alston presented the Dashboard. She discussed the report in detail noting total enrollments and comparisons between the 1<sup>st</sup> and 2<sup>nd</sup> quarters of PY22. Ms. Alston addressed questions and comments. The Performance Review Committee received the Dashboard Performance Report as information.

**B) OJT Reports:** Ms. Alston presented the OJT report for PY22 to date. She discussed the job titles, industry clusters, duration of training, salary, status and outcomes. Ms. Alston addressed questions and comments. The Performance Review Committee received the OJT Report as information.

**VI. Other Business**

There was no further business to discuss.

**VII. Adjourn**

There being no further business to discuss, Ms. Cappellini thanked everyone for attending the meeting and adjourned the meeting at 12:00 p.m.

Respectfully submitted,  
Kim Coleman

DRAFT

## MEMORANDUM

**TO:** Performance Review Committee  
**FROM:** Sharon Goss, Workforce Development Director  
**SUBJ:** Rating Criteria  
**DATE:** March 21, 2023

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The Trident Workforce Development Board (TWDB) approved the current rating criteria for new programs in 2020. The rating criteria have not been updated since. Staff is asking the Performance Review Committee to review the rating criteria for updates in the following areas:

- Online Programs (including those out of state)
- Waivers for training providers/programs that do not meet the 1-year performance requirement

**Recommendation:**

Staff is recommending that the committee reevaluate the criteria for new training approvals due to the shortage of training programs available.

# REVIEW CRITERIA FOR TRAINING PROGRAMS

New requirements set forth in the Workforce Innovation and Opportunity Act (WIOA) requires an evaluation process be established for reviewing all training programs funded through the WIOA grant. In making preparation for the new requirements, The Trident Workforce Development Board (TWDB) has established the following criteria to review and evaluate training programs. Training Services shall be REVIEWED and EVALUATED on the basis of the criteria set forth herein. Each training program must receive a minimum REVIEW SCORE of 75 in order to utilize WIOA funds towards the tuition cost. Training Programs that receive a review score of 74 or below will be sent a letter of not approved for the ETPL and the process of appeal. Providers will have 30 days from date of receipt of letter to appeal the decision. Appeals will be sent to the Executive Director of the BCDCOG in care of the board's chair. The appeal will be reviewed by the Performance Review Committee and recommendation forwarded to the board for a final decision.

Initial	PY & QTR
X	

Provider/Organization: \_\_\_\_\_

Review Type (X) one:

( Rate x Weight = Score )

	REVIEW CRITERIA	Rate (0-5)	Weight	Score	
1.	Program and/or Instructor is accredited or certified by a related recognized accreditation Body in a related field: (no=0; yes= 5)		1	0	(max. 5)
2.	Length of training is 6 months or less = 5 points; 7 - 12 months = 3 points; 12 months or more = 1 point		4	0	(max.20)
3.	Provider is located in either Berkeley, Charleston and Dorchester county = 5 points; located in SC= 3 points; online programs/out of state = 0 points		5	0	(max. 25)
4.	Program leads to a National and/or State certification in an Occupational Field: (no= 0; yes= 5)		4	0	(max. 20)
5.	Cost Per Training: 0-\$2,500 = 5 points; \$2,501 - \$5,999 = 3 points and \$6,000 or higher = 0 points		3	0	(max. 15)
6.	Training Program falls under one of the approved training clusters established by the board (no= 0; yes=5) 5= approved; 0= does not meet		3	0	(max. 15)
<b>TOTAL SCORE</b>				<b>0</b>	(max. 100)

**Approved** (overall Score 75 or more continue to utilize program and provider)

**Overall** Scores 74 or less Not Recommended for the ETPL in the Trident Area.

\_\_\_\_\_  
SIGNATURE OF REVIEWER

\_\_\_\_\_  
PRINT NAME OF REVIEWER

\_\_\_\_\_  
Date

## MEMORANDUM

**TO:** Performance Review Committee  
**FROM:** Sharon Goss, Workforce Development Director  
**SUBJ:** Training Cap Increase Discussion  
**DATE:** March 21, 2023

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The current training amount for the Trident Workforce Development Area is \$7,5000 for a lifetime. Contractual Staff with Ross IES is requesting to increase this amount to \$10,000 for a lifetime. This would allow participants to go through work experiences and receive additional training. This would allow participants to go through occupational training and receive OJT training as well.

**Recommendation:**

Staff is recommending that the Committee review the training cap in the Training Policy to determine if an increase is needed.

## TRIDENT

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**Trident Workforce Development Board  
Workforce Innovation and Opportunity Act**

**TRAINING SERVICES POLICY**

**TO:** SC Works Trident Operators, WIOA Program Provider, Staff and Partners

**ISSUANCE DATE:** December 10, 2019

**EFFECTIVE DATE:** December 10, 2019

**SUPERSEDES:** August 28, 2019, January 31, 2018, December 5, 2017, September 27, 2017, March 10, 2015, July 1, 2014, November 12, 2013, May 15, 2012, February 14, 2012, November 8, 2011, August 9, 2011, July, 27, 2011, July 1, 2010, March 31, 2009, October 7, 2008 and July 1, 2007

**SUBJECT:** **TRAINING SERVICES POLICY**

**PURPOSE:**

The purpose of this policy is to establish guidelines for training services in accordance with the WIOA law and regulations and the Trident Workforce Development Board.

**POLICY:**

The Trident Workforce Development Board will invest funds in training programs that fall under the established Industry clusters for the SC Works Trident area. Participants must enter into training in one of the Industry clusters below. The Industry clusters are as follows:

- **Diversified Manufacturing**
- **Transportation & Logistics**
- **Healthcare**
- **Information Technology**
- **Construction Trades**
- **Hospitality & Tourism**

**PROCEDURES:**

Since the goal of the program is to provide training that leads to employment (or education for youth), participants must not be enrolled in training programs that exceed 24 months or enroll in two or four-year degree programs unless the WIOA funded program can be completed within 24 months. In accordance with Section 663.320 of the WIOA Regulations, "WIOA funding for training is limited to participants who are unable to obtain grant assistance from other sources to pay the costs of their training." Participant files must document that the participant and WIOA Career Coach made every effort to secure other funding sources for the training, such as PELL grant, SC Education Lottery and NAFTA-TAA funds. Per USDOL, a person without a GED or high school diploma does not have marketable employment skills; therefore, if a participant does not have a HS Diploma or GED, it must be

addressed in the Individual Employment Plan (IEP) and in case notes and at minimum, referred to a program where they can receive guidance on gaining a HS Diploma or HS Equivalency even if a high school credential is not a requirement for training by a training provider.

Participants who received a certificate of completion may have the option to enter training upon approval from the Operations Director. A memo of approval should be submitted and placed in the hard file and scanned in SCWOS as verification of approval.

Participants are required to complete Career Readiness Assessments if it is a requirement by the training provider and/or Employer. See Assessment, Background and Drug Screening Policy for additional Assessment requirements.

**Repayment of a course or exam:**

The cost of an exam and/or certification related to training is an allowable cost from WIOA funds. In the event a WIOA participant does not successfully pass a course, they will have one opportunity to have only one course repaid during the full training program.

In the event a WIOA participant does not successfully pass an exam, they will have one opportunity to have the exam repaid for through WIOA. This applies for the complete life of the training programs. This does not include the GED exam. If a participant unsuccessfully completes a training to include an OJT, the need for further training will be evaluated and approval made by the Operation Director based on the circumstances.

*Approval is required prior to paying a second time for an exam or course.*

**The following items will be included under Supportive Services for participants and will continue to be funded with WIOA funds:**

- Tools required by the provider or employer
- Uniforms required by the provider or employer
- Books
- Exam fees
- Drug screens required by the provider
- Background checks
- Other items required as part of the training program or for employment i.e. transcripts to sit for exams

Training services for adults will be limited to:

- Adults that are a part of the priority of service group
- Participants that meet the definition of not self-sufficient (adult program participant)
- Those adults not a part of the priority of service group, but has demonstrated the need for training. Sufficient documentation in case notes and job search logs may be used to demonstrate need.
- A maximum of \$7,500 per participants for the lifetime of the program

Training services will be limited to the guidelines below:

- Maximum amount is \$7,500, per lifetime of the program. The SC Works Operator will be responsible for any payment of funds expended over the maximum amount without prior exception approval from the Executive Director of the BCDCOG.
- Maximum length of training is 24 months per participant, per lifetime of the program. *Exceptions can be made by the Eckerd Youth Alternatives Regional Manager to training that exceeds 24 months based on the need of the participant.*
- The amount and length limits are totals, not amounts for each training activity.



## TRIDENT

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- Training costs that are included in the limitation are post-secondary education, occupational skills training, work experience, OJT and GED training activities.
- Room and board, including meal plans, is not allowable training costs for youth. Costs associated with Employability/ Work Maturity and assessments are not included in this limitation.

**NOTE: THE EXECUTIVE DIRECTOR OF THE BERKELEY CHARLESTON DORCHESTER COUNCIL OF GOVERNMENTS HAS THE DISCRETION TO MAKE EXCEPTIONS TO THIS POLICY; SEE *CREATION AND REVISION OF POLICIES*.**



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Ronald Mitchum, Executive Director  
BCDCOG

December 10, 2019

Date

TWDB PERFORMANCE REVIEW COMMITTEE

PY22 July 1, 2022 - June 30, 2023

ELIGIBLE TRAINING PROVIDER SCORECARD - Adult & Dislocated Workers

Provider	Program	Completed from PY2021	Enrolled training in PY2022	Total # Enrolled Training	Total Still in Training	Total Unsuccessful	Total Successfully Completed	Total Exited	Total Completed with Certification/Credential	Total Employed	Total Employed in Field or Related Field of Training	% of Total Employed in Field or Related Field	# with Benefits	Average Wage Earnings	Cost of Training Per Participant	Total Cost of Training for all Participants in program	Overall Rating Score Per Program
Air Conditioning and Refrigeration Training Center	Basic Training for HVAC Technicians- Residential/Light Commercial AC & Heat Pump Service Certification Program	1	0	1	0		1	1	1	1	1	100%	1	\$20.00	\$6,000.00	\$6,000.00	90%
Arclabs Welding School	900 Hour Advanced Welding	1	0	1			1	1	1	1	1	100%	1	\$21.00	\$17,050.00	\$17,050.00	90%
Meckerts	IT-2000- IT Helpdesk Administrator	2	0	2	1		1	1	1	1	1	100%	1	\$21.20	\$4,000.00	\$8,000.00	96%
	HI-1000 Medical Front Office Assistant and Administration	1	1	2	1		1	1	1						\$2,000.00	\$4,000.00	41%
PSI Project Management, Inc.	Project Management Training Program for PMP/CAPM Exam Prep and Project Managers	0	1	1			1	1	1						\$2,799.00	\$2,799.00	41%
Career Step, LLC	ESG Technician	0	1	1	1		0	0	0	0	0				\$1,899.00	\$1,899.00	
PSI, Inc.	A+ Certification	1		1		1		1							\$1,454.00	\$1,454.00	10%
PSI, Inc.	Microsoft Office Specialist	1		1			1	1	1						\$1,731.00	\$1,731.00	45%
Palmetto Training Inc	CDL	16	28	44	18	8	18	26	16	10	10	56%	10	\$19.36	\$5,500.00	\$242,000.00	71%
Palmetto School of Career Development	General Chiropractic Assisting		1	1		1		1							\$6,700.00	\$6,700.00	0%
Palmetto School of Career Development	Medical Billing and Coding	1	0	1		0	1	1	1	1	1	100%	1	\$16.00	\$4,075.00	\$4,075.00	96%
Palmetto School of Career Development	General Assisting Chiropractic with General Front Office Administration	1	0	1			1	1	1						\$6,700.00	\$6,700.00	35%
Palmetto School of Career Development	Pharmacy Technician Assistant	3	0	3	0	0	3	3	3						\$2,120.00	\$6,360.00	45%
STVT - DBA Miller-Motte College	CDL	2	8	10	5	0	5	5	5	3	3	60%	3	\$23.00	\$4,500.00	\$31,500.00	86%
Second Chance Job Center	Pre-Apprenticeship Certificate Training (Plumbing)	1	0	1	0	0	1	1	1	1	1	100%	1	\$15.00	\$5,700.00	\$5,700.00	96%
	Pre-Apprenticeship Certificate Training (Electrical)		2	2	1	0	1	1							\$5,700.00	\$11,400.00	41%
	Pre-Apprenticeship Certificate Training (Welding)	0	1	1	1	0									\$5,700.00	\$5,700.00	
Trident Technical College	Biotech Processing Technician	1	0	1	1	0	0	0	0	0	0				\$1,869.00	\$1,869.00	
	Certified Nurse Aide	1	1	2	0	0	2	2	2	0	0				\$1,267.00	\$2,534.00	45%
	Medical Assisting	6	0	6	0	0	6	6	6	3	3	50%	3	\$16.33	\$4,430.00	\$26,580.00	81%
<b>Totals</b>		<b>39</b>	<b>44</b>	<b>83</b>	<b>29</b>	<b>10</b>	<b>44</b>	<b>54</b>	<b>41</b>	<b>21</b>	<b>21</b>		<b>21</b>		<b>\$91,194.00</b>	<b>\$394,051.00</b>	

Scorecard Guide: From Rating Sheet Point value

Successful Completion: Successful Completion/Total Exited

Total Completed w/certificate or credential = Total Completed with a certificate or credential/Total Exited

Total Employed = Total Employed/Total Exited

Total Employed in field or related field = Total Employed in field/Total Successful Completion

Average hourly wage: Average hourly wage of those employed as reported


Cost Per Training: Based on the cost of tuition as reported by the Training Provider

Color Code:  
 Below 75%  
 Above 80%  
 Exceeds (100%)  
 At Benchmark  
 Enrolled  
 Incomplete

\*Under % of Total Employed in field or related field, numbers in "red" indicates below benchmark of 75%. "Black" indicates 75% or higher. \*

WIOA PERFORMANCE DASHBOARD (Ross IES Performance )

PROGRAM YEAR 22 (July 1, 2022to June 30, 2023)

 BRINGING EMPLOYERS AND JOB SEEKERS TOGETHER		1st Quarter PY22			2nd Quarter PY22			3rd Quarter PY21		PY22 Total
		July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Total
Report Date:	3/13/23 2:13 PM									
<b>WIOA PROGRAM</b>										
Attended WIOA Informational Sessions (Adult)		76	109	50	49	29	21	46	46	426
SC Works Berkeley		19	13	13	7	6	7	8	6	79
SC Works Charleston		30	36	31	34	18	13	27	32	221
SC Works Dorchester		4	11	6	8	5	1	11	8	54
Attended WIOA Informational Sessions (DW)		2	1	2	2	1	0	0	0	8
SC Works Berkeley		0	0	0	0	0	0	0	0	0
SC Works Charleston		2	1	2	2	1	0	0	0	8
SC Works Dorchester		0	0	0	0	0	0	0	0	0
Attended Orientation (Youth)		21	48	28	19	12	7	33	25	193
Met Eligibility Requirements (Adult)		10	43	28	29	15	25	40	32	222
SC Works Berkeley		0	0	1	4	1	3	4	2	15
SC Works Charleston		10	43	27	25	13	22	31	29	200
SC Works Dorchester		0	0	0	0	1	0	5	1	7
Met Eligibility Requirements (DW)		2	1	2	2	1	0	0	0	8
SC Works Berkeley		0	0	0	0	0	0	0	0	0
SC Works Charleston		2	1	2	2	1	0	0	0	8
SC Works Dorchester		0	0	0	0	0	0	0	0	0
Met Eligibility Requirements (Youth)		3	9	6	14	7	3	12	11	65
Enrolled in WIOA Program (Adult-new)		10	43	28	29	15	23	38	25	211
SC Works Berkeley		0	0	1	4	1	3	4	2	15
SC Works Charleston		10	43	27	25	13	20	29	22	189
SC Works Dorchester		0	0	0	0	1	0	5	1	7
Enrolled in WIOA Program (DW-new)		2	1	2	2	1	0	0	0	8
SC Works Berkeley		0	0	0	0	0	0	0	0	0
SC Works Charleston		2	1	2	2	1	0	0	0	8
SC Works Dorchester		0	0	0	0	0	0	0	0	0
Enrolled in WIOA Program (Youth-new)		3	9	6	14	7	3	10	9	61
Total Served in WIOA Program (Adult): Carry-In= 158 New= 211										369
Total Served in WIOA Program (DW): Carry-In= 3 New= 8										11
Total Served in WIOA Program (Youth) Carry-In= 28 New =61										89
<b>TRAINING</b>										
Entered Training (during the month)		0	8	5	10	20	6	23	13	85
Diversified Manufacturing		0	0	0	0	0	0	0	0	0
Transportation/Logistics		0	5	0	6	15	6	11	9	52
Healthcare		0	2	4	3	0	0	4	3	16
IT Services		0	0	0	0	0	0	0	0	0
Trade/Construction		0	1	1	1	5	0	8	1	17
Hospitality/Tourism		0	0	0	0	0	0	0	0	0
Total received Training (Adults) PY22										122
Total received Training (DWs) PY22										4
Total received Training (Youth) PY22										28
Credential Earned (Adult & DW)		4	7	9	6	2	5	2	3	38
Diversified Manufacturing		0	0	0	0	0	0	0	0	0
Transportation/Logistics		4	3	3	3	1	4	2	1	21
Healthcare		0	4	4	1	1	1	0	2	13
IT Services		0	0	0	0	0	0	0	0	0
Trade/Construction		0	0	1	2	0	0	0	0	3
Hospitality/Tourism		0	0	0	0	0	0	0	0	0
GED		0	0	1	0	0	0	0	0	1
Youth Credentials Earned		0	2	0	1	5	2	2	1	13
<b>EMPLOYMENT</b>										
Entered Employment (WIOA)		7	19	4	3	3	1	3	3	43
Entered Employment with an OJT		0	0	0	1	0	1	2	5	9
Youth Placed in Employment or Education 2nd QTR		6	10	10	8	10	2	5	0	51
Youth Placed in Employment or Education 4th QTR		8	11	10	6	5	6	19	0	65



PY22 OJT Report: July 1, 2022 - June 30, 2023

Job Title	Industry Cluster	Duration	Date	Salary	Status	Outcome	Reverse Referral
1 Deck Hand	Manufacturing	12 weeks	8/22/2022	\$ 20.00	Closed	Successful	Yes
2 Office Admin	Healthcare	12 Weeks	09.26.2022	\$ 20.00	Closed	Unsuccessful	Yes
3 Office Admin	Healthcare	12 Weeks	09.26.2022	\$ 20.00	Closed	Successful	Yes
4 Care Provider	Healthcare	12 weeks	10.24.2022	\$ 12.00	Closed	Unsuccessful	Yes
5 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Active		Yes
6 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Closed	Unsuccessful	Yes
7 Deck Hand	Manufacturing	12 Weeks	10.31.2022	\$ 20.00	Closed	Successful	Yes
8 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Closed	Unsuccessful	Yes
9 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Active		Yes
10 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Closed	Unsuccessful	Yes
11 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Active		Yes
12 Welder	Manufacturing	12 Weeks	11.14.2022	\$ 12.00	Active		Yes
13 Manager	Distribution	12 Weeks	11.5.2022	\$ 20.00	Closed	Unsuccessful	Yes
14 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 17.00	Active		Yes
15 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 20.00	Closed	Unsuccessful	Yes
16 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 20.00	Closed	Unsuccessful	Yes
17 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 20.00	Closed	Unsuccessful	Yes
18 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 20.00	Closed	Unsuccessful	Yes
19 Delivery Driver	Distribution	12 Weeks	11.5.2022	\$ 20.00	Active		Yes
20 Delivery Driver	Distribution	12 weeks	12.14.2022	\$ 20.00	Active		Yes
21 Crane Operator	Manufacturing	12 weeks	1/9/2023	\$28	Active		Yes
22 Welder	Manufacturing	12 weeks	1/9/2023	\$ 14.00	Active		yes
23 Heavy Equipment Operator	Manufacturing	12 weeks	1/9/2023	\$ 24.00	Active		Yes



