

TRIDENT WORKFORCE DEVELOPMENT BOARD

September 22, 2026

10:00 AM

Barrett Lawrimore Conference Room
5790 Casper Padgett Way
North Charleston, SC 29406

AGENDA

- I. Call to Order/Quorum Determination/Introductions
- II. Approval of Meeting Notes –June 2, 2026
- III. Adult and Youth Participant Success Stories
- IV. Policy Revisions – Request for Approval – Sharon Goss
 - a. Eligibility, Enrollment and Priority of Services Policy Revision
 - b. Eligible Training Provider Policy Revision
- V. PY26 Adult, Dislocated Worker and Youth Statement of Work (SOW) Update - Request for Approval – Sharon Goss
- VI. Corrective Action Plan for Youth Non-Performance – Request for Approval – Sharon Goss
- VII. Administrative & Systems Reports:
 - a. Financial Report – Katie Paschall
 - b. Program Performance Report – Kameron Alston
 - c. Adult/Dislocated Worker/Youth Program Performance Report – Brent LaPlante
 - d. Marketing/Communications Report – Matt Spath
- VIII. TWDB Member's Time
- IX. Workforce Development Director's Time
- X. Executive Director's Time
- XI. Other Business
- XII. Adjourn

Next Meeting is scheduled for November 3, 2026

TRIDENT WORKFORCE DEVELOPMENT BOARD

(TWDB)

Board of Directors

Meeting Notes

June 2, 2026

The Trident Workforce Development Board (TWDB) held a Board of Directors meeting on Tuesday, June 2, 2026 at 10:00 a.m. in the Barrett Lawrimore Conference Room at the Berkeley-Charleston-Dorchester Council of Governments located at 5790 Casper Padgett Way in North Charleston, South Carolina.

MEMBERSHIP: Tod Anderson; Mendi Arnold; Diane Bagwell; Jenny Bing; Janet Cappellini; Natasha Chatman; April Clarke; Butch Clift; Marshall Connor; Wendy Courson; Susan Friedrich; Johnell Gaines; Pat Gilliard; Chris Hall; Jess Key; Jessica Lewis; Ken Malcom; Andrew Maute; Amanda McNeal; Varity Poston; Gordon Rooney; Don Smith; James Villeponteaux

MEMBERS PRESENT: Tod Anderson; Mendi Arnold; Janet Cappellini; Butch Clift; Marshall Connor; Susan Friedrich; Chris Hall; Andrew Maute; Amanda McNeal; Varity Poston; Gordon Rooney; Don Smith

OTHERS PRESENT: Teresa Hawkins (Department of Social Services) on behalf of Jenny Bing; Justin Wingard (SMART 399); Brent LaPlante (Ross IES); Megan Earle (Ross IES); Deidre Smalls (Eckerd Connects); La'Verne Wood (Eckerd Connects); Shenieka Voluntad (SCDEW); Nick Rozakos (SCDEW); Dave Tam (SCDEW)

BCDCOG STAFF PRESENT: Andrea Kozloski; Sharon Goss; Kameron Alston; Ambert Gant; LaQuosha Mack; Katie Paschall; Matthew Spath

I. Call to Order/Quorum Determination/Introductions

Chairman Clift called the meeting to order at 10:00 a.m. followed by introductions, a quorum determination and excused absentees. Mr. Maute announced that he is retiring. Justin Wingard will fill Mr. Maute's seat on the Board of Directors. Mr. Wingard is with SMART 399. Chairman Clift then read a letter of resignation that was received from Board Member Shirley Collenton. Ms. Collenton served on the Board of Directors for several years. Her dedicated service to the Board and the community was invaluable and the Board and Staff wish her well in her future endeavors.

II. Election of Officers

Chairman Clift noted that Board Member and Nominating Committee Chair, Mendi Arnold, would present the Election of Officers agenda item. Ms. Arnold stated that a Nominating Committee meeting was held via Microsoft Teams on Wednesday, May 27, 2026 at 1:30 p.m. Nominations were made, discussion was held and the following Slate of Officers is being presented to the Board of Directors for approval during today's meeting:

- Butch Clift, Chairman
- Janet Cappellini, Vice Chair
- Varity Poston, 2nd Vice Chair

Mr. Connor made a motion to approve the Slate of Officers as presented.

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

III. Approval of Meeting Notes – April 14, 2026

Mr. Connor made a motion to approve the April 14, 2026 Meeting Notes as presented.

Ms. Arnold seconded the motion. The motion was unanimously approved.

IV. Adult and Youth Participant Success Stories

Brent LaPlante, Project Director with Ross IES, delivered a presentation regarding Adult and Youth Program Participant Success Stories. He highlighted a Success Story noting that a participant recently entered the WIOA program with the goal of obtaining employment in the medical field. The participant successfully completed CNA training with Integrity Healthcare and is currently employed full-time with Premier Medical earning \$18.50 per hour. Another participant entered the WIOA program on August 8, 2025, with the goal of obtaining employment in the HVAC field. The participant successfully completed HVAC training at DEW HVAC Training Services Center on April 30, 2026 and has secured full-time employment with Rudd earning \$25.00 per hour. The Trident

Workforce Development Board of Directors received the Adult and Youth Participant Success Stories as information.

V. FY2027 Budget – Request for Approval – Katie Paschall

Katie Paschall, Finance Manager, presented the FY2027 Budget. She explained, in detail, the variances in revenue and expenditures in administration cost, operating cost and program cost. Ms. Paschall noted that staff will continue to monitor the budget to ensure revenues and expenditures remain aligned and will make recommended revisions as necessary. Ms. Paschall addressed questions and comments.

***Mr. Hall made a motion to approve the FY2027 Budget as presented.
Mr. Connor seconded the motion. The motion was unanimously approved.***

VI. FY2026 Operator, Adult, Dislocated Worker and Youth Statement of Work (SOW) – Request for Approval – Sharon Goss

Sharon Goss, Director of Workforce Development, presented the FY2026 Operator, Adult, Dislocated Worker and Youth Statement of Work (SOW). She noted that the SOW outlines the expectations and programmatic goals for the upcoming program year. Ms. Goss stated that Ross Innovative Employment Solutions (Ross IES) will continue to serve as the service provider for the WIOA Adult, Dislocated Worker and Youth Programs. The SOW specifies that the Youth Program will serve 200 participants, while the Adult/Dislocated Worker Programs will serve 500 participants during the Program Year 2026 (July 1, 2026 through June 30, 2027). This participant count includes carryovers from PY2025 and is subject to change based on the actual budget once received. Additionally, the program will adhere to all Training & Employment Guidelines issued by the Department of Labor, State Instruction Letters from the South Carolina Department of Employment & Workforce (SCDEW), and local policies set forth by the Trident Workforce Development Board. Ms. Goss noted that Eckerd Connects will serve as the WIOA Operator for Program Year 2026 (July 1, 2026 through June 30, 2027). The Operator SOW outlines the expectations for the center operator to effectively manage the centers and provide oversight to partners in the facility to ensure that workforce development services are accessible to individual and employer customers. Ms. Goss explained that the revisions in the respective SOWs, which are included in the Board Meeting Agenda Packet, are highlighted for easy reference. Ms. Goss addressed questions and comments.

***Mr. Connor made a motion to approve the FY2026 Operator, Adult, Dislocated Worker and Youth Statement of Work (SOW) as presented. Ms. McNeal seconded the motion.
The motion was unanimously approved.***

VII. WIOA Contract Renewal – Request for Approval – Sharon Goss

- A) Adult/Dislocated Worker Services Provider (Ross Innovative Employment Solutions):** Ms. Goss noted that the BCDCOG is requesting approval to amend the Ross Innovative Employment Solutions Corp.-Adult/Dislocated Worker Program Provider contract # WIOA2025-01 for an additional year pursuant to the renewal terms outlined in the contract. The contract was awarded on July 1, 2025 as a one-year contract with two options to renew annually. If approved, this amendment will extend the contract through June 30, 2027.

***Ms. Arnold made a motion to approve the Adult/Dislocated Worker Services Provider WIOA Contract Renewal as presented. Mr. Smith seconded the motion.
The motion was unanimously approved.***

- B) Youth Services Provider (Ross Innovative Employment Solutions):** Ms. Goss noted that the BCDCOG is requesting approval to amend the Ross Innovative Employment Solutions Corp.-Youth Program Provider contract # WIOA2025-02 for an additional year pursuant to the renewal terms outlined in the contract. The contract was awarded on July 1, 2025 as a one-year contract with two options to renew annually. If approved, this amendment will extend the contract through June 30, 2027. Ms. Goss addressed questions and comments. Discussion was held regarding the Youth Services Provider not being on track to meet PY2025 goals. Following discussion, it was determined that Ross Innovative Employment Solutions be placed on a corrective action plan due to a low fund utilization rate (FUR) and low enrollment in the WIOA Youth Program. At a minimum, the corrective action plan should include that each staff member serve a minimum of two

individuals per day and provide eligibility and enrollment services on-site at high schools and pop-up events in the rural communities.

Ms. McNeal made a motion to approve the Youth Services Provider WIOA Contract Renewal as amended to include that Ross Innovative Employment Solutions be placed on a corrective action plan to include that each staff member serve a minimum of two individuals per day and provide eligibility and enrollment services on-site at high schools and pop-up events in the rural communities.

Ms. Arnold seconded the motion. The motion was unanimously approved.

- C) Operator Contract (Eckerd Connects):** Ms. Goss noted that the BCDCOG is requesting approval to amend the Eckerd Connects-One-Stop Operator contract #WIOA2025-03 for an additional year pursuant to the renewal terms outlined in the contract. The contract was awarded on July 1, 2025 as a one-year contract with two options to renew annually. If approved, this amendment will extend the contract through June 30, 2027.

Mr. Maute made a motion to approve the Operator WIOA Contract Renewal as presented.

Ms. Arnold seconded the motion. The motion was unanimously approved.

VIII. Administrative and Systems Reports:

- A) Financial Report – Katie Paschall:** Katie Paschall, Finance Manager, presented the WIOA Financial Reports for the period ending April 30, 2026. She delivered an overview of the activities for FY26 thus far. Ms. Paschall noted that, for fiscal year-to-date, workforce expenditures total \$2,386,403 as of April 30, 2026. Ms. Paschall also discussed the Budget to Actual report for revenues and expenditures for the period ending April 30, 2026 and noted that the budget is on point at this time. Ms. Paschall noted that recommendations will be made to the Board of Directors and adjustments to the budget will be recommended as needed for the budget to remain aligned. Ms. Paschall addressed questions and comments. The Trident Workforce Development Board of Directors received the Financial Report as information.
- B) Program Performance Reports – Kameron Alston:** Kameron Alston, Performance Outcomes Coordinator, presented the Program Performance Reports. She discussed the Performance Matrix as of March 31, 2026. Ms. Alston delivered details regarding Participant Cost Rate, Youth Work-Based Learning (WBL) Expenditure Requirements and Expenditure Rates by Funding Stream. She noted that several key performance measures are currently below the requirement benchmarks when measured against mid-year expectations. Results reflect performance-to-date within defined fiscal and grant performance periods, not final year outcomes. Management is actively monitoring trends and implementing corrective strategies where necessary. Ms. Alston noted that compliance has been met for PY2024; however, PY2025 expenditures are below the required threshold at this stage of the grant cycle. She also noted that Adult and Dislocated Worker combined totals 50.39% and that all three funding streams are currently below the expected mid-year expenditure benchmark. Management is monitoring expenditure pacing across all funding streams, increasing focus on service delivery and allowable cost utilization, and tracking Youth WBL expenditures to ensure future compliance. If necessary, any corrective actions or reallocation requests will be brought to the Board of Directors. Ms. Alston then briefed the Board regarding the WIOA Performance Dashboard detailing all categories and carry-ins. She discussed On-the-Job Trainings for PY25 as of April 30, 2026, noting that there are 20 participants; six are in active job status. She also briefed the Board on the Eligible Training Provider Scorecard as of April 30, 2026, noting that there are 11 training providers and 21 training programs. Ms. Alston discussed the Monthly Centers Reports noting that during the reporting period, overall, the SC Works Berkeley Team delivered 35,172 employment-related services to customers through a combination of phone, in-person and online support. The Charleston Team delivered 97,487 employment-related services to customers through phone, in-person and online engagement. The Dorchester Team delivered 25,920 employment-related services to customers through a combination of phone, in-person and online support. Ms. Alston then delivered the Performance Summary Report for the State, noting that the Trident Region is passing in all categories. Ms. Alston and Ms. Goss addressed questions and comments. The Trident Workforce Development Board of Directors received the Program Performance Reports as information.
- C) Adult & Dislocated Worker/Youth Program Performance Report – Brent LaPlante:** Mr. LaPlante delivered an Overview of the WIOA Program as of May 15, 2026. He noted the following: WIOA Program Orientation in Berkeley County = 67 Adults/Dislocated Workers & 18 Youths; WIOA Program Orientation in Charleston County = 717 Adults/Dislocated Workers & 44 Youths; WIOA Program Orientation in Dorchester County = 98

Adults/Dislocated Workers & 25 Youths. Mr. LaPlante then discussed the WIOA Program Enrollment Numbers as of May 15, 2026: Berkeley County = 21 Adults, 2 Dislocated Workers & 6 Youths; Charleston County = 161 Adults, 9 Dislocated Workers & 29 Youths; Dorchester County = 29 Adults, 4 Dislocated Workers & 17 Youths; Overall: Adults = 211; Dislocated Workers = 15; Youths = 52. Mr. LaPlante discussed the Total Served in the WIOA Program as of May 15, 2026: Adults = 332 (121 carry-in); Dislocated Workers = 19 (4 carry-in); Youths = 72 (20 carry-in). He noted that carry-in numbers are subject to change. Mr. LaPlante then discussed Training as of May 15, 2026 noting that 146 Adults, 9 Dislocated Workers and 22 Youths received training in PY25; 63 credentials were earned as well as 279 Measurable Skills Gained (MSGs) for 234 participants. He noted that the Work Based Learning program resulted in the following: PY25 WEX = 10 (4 active) as of May 15, 2026 and that WEX/WBL recruitment continues. Mr. LaPlante discussed upcoming events and outreach strategies noting that the I-526 Projects continue (School-To-Work and Careers in Transportation). Mr. LaPlante addressed questions and comments. The Trident Workforce Development Board of Directors received the Adult & Dislocated Worker/Youth Program Performance Report as information.

D) Marketing/Communications Report - Matthew Spath: Matthew Spath, Director of Communications, delivered a Marketing/Communications Report. He discussed the outcome of recent hiring events and job fairs noting the respective successes. Mr. Spath highlighted the “Your Next Step” Job Fair that was held on April 23, 2026. He noted that there were three weeks of media and social media promotion including interviews by Live 5 News and News 2 as well as articles, on-air segments, social media posts and community calendar posts. Mr. Spath highlighted the Charleston County Economic Development Career Fair that was held on May 8, 2026. There were two weeks of social media promotion in collaboration with CCED. Mr. Spath discussed SCDEW’s campaign regarding the SC@Work photo contest and Workforce Champion award nominations. He then discussed upcoming events such as the Career Success Summit, the Military Sealift Command Hiring Event, the Upper Dorchester County Career Fair and the Charleston Water System Hiring Event. Mr. Spath noted that September is the Workforce Development Month. He stated that planning is underway and will be promoted in conjunction with the counties. Mr. Spath discussed event flyers noting that templates are created in collaboration with the Business Services Team which will ensure alignment with brand standards and will provide flexibility for request and approval processes. He also discussed implementing trackable QR codes on events and flyers which will provide insight into flyer circulation by reporting total and unique scans over time. Mr. Spath stated that consistent updates are made to the events calendar and that for the first quarter this year, there has been a 77% increase in engaged sessions year-over-year. Mr. Spath addressed questions and comments. The Trident Workforce Development Board of Directors received the Marketing/Communications Report as information.

IX. TWDB Members’ Time

There was no further business to discuss.

X. Workforce Development Director’s Time

Ms. Goss had no further business to discuss.

XI. Executive Director’s Time

On behalf of Executive Director Ron Mitchum, Andrea Kozloski, Deputy Director of Operations and Support, thanked the Board Members for their time and attending today’s Board of Directors meeting.

XII. Other Business

There was no further business to discuss.

XIII. Adjourn

Chairman Clift recognized Mr. Maute’s several years of dedicated and invaluable service to the Board of Directors and the community. The Board of Directors extended their congratulations to Mr. Maute regarding his upcoming retirement and wished him well. There being no further business to discuss, Chairman Clift thanked everyone for attending today’s meeting and adjourned the meeting at 11:06 a.m.

Respectfully submitted,
Kim Coleman

SC WORKS

TRIDENT

Success Story

► The Tradewinds WEX program was a great success. We had 13 individuals complete the program. They learned aspects of pipe fitting, painting, sheet metal and welding. They had class on-site at Newport News and at Trident Technical College. All of the students received extensive knowledge from industry professionals. They also were able to do resumes and have mock interviews. Some of these individuals were ISY's, which after completing this program completed their Career Readiness obligation. The OSY's that were interested have applied for positions at Newport News and are pending at last check.



Success Story

- Maria Hernandez came into the WIOA program in October of 2025. She began Medical Assistant training with Lowcounty Medical on 1/12/26. She successfully completed the course and successfully passed the certification exam for CMA. She is now employed with the Hollings Cancer Center at MUSC as a Certified Medical Assistant.



MEMORANDUM

Date: September 22, 2026
To: Trident Workforce Development Board
From: Ronald Mitchum, Executive Director
Subject: Eligibility, Enrollment and Priority of Services Policy Revision

To ensure the Trident Workforce Development area remains current with the South Carolina Department of Employment and Workforce (SCDEW) State Instruction Letters, the Eligibility and Enrollment/Delivery of WIOA Title I Adult Services Policy, including Priority of Services guidance, is being updated.

The policy language has been revised to incorporate and align with the requirements and guidance outlined in SCDEW State Instruction Letter 26-01.



Trident Workforce Development Board Workforce Innovation and Opportunity Act

ELIGIBILITY , ENROLLMENT PRIORITY OF SERVICES POLICY

TO: SC Works Trident Operator/ Staff

ISSUANCE DATE: September 22, 2026

EFFECTIVE DATE: August 5, 2026

SUPERSEDES: August 28, 2018, February 27, 2018, September 27, 2016, July 31, 2013, May 15, 2012, February 14, 2012, July 1, 2010, June 17, 2008 and July 1, 2002

SUBJECT: **Eligibility, & Enrollment and Priority of Services Policy**
Delivery of WIOA Title I Adult Services

PURPOSE:

The purpose of this policy is to establish requirements for determining Adults, Dislocated Workers and Youth eligible for enrollment and priority of services for the WIOA Programs. This policy expires the Priority of Services Policy

BACKGROUND: WIOA is designed to help jobseekers secure employment, education, training, and support services necessary to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. Determining customer eligibility ensures that the individuals access the services both needed and allowed under WIOA. Furthermore, collecting and maintaining applicable source documentation ensures program accountability and alignment with the goals of WIOA.

POLICY:

In accordance with the Workforce Innovation and Opportunity Act and regulations, all participants enrolled into the WIOA program must be determined eligible prior to receiving Individualized Career Services and/or training services. No barriers or requirements should be placed on individuals in order to receive eligibility.

The WIOA Service Provider is responsible for determining eligibility for all WIOA participants prior. The eligibility process is completed in the South Carolina Works Online System (SCWOS).

Priority of Services

Priority for individualized career and training services in the WIOA Adult program must be given

to recipients of public assistance, low-income individuals, and individuals who are basic skills deficient regardless of the availability of funds.

At least 75% of the participants statewide receiving individualized career and training services in

the WIOA Adult program must be from at least one of the priority groups mentioned above.

Local Workforce Development Boards (LWDBs) may establish a process that also gives priority to

other individuals eligible to receive such services, provided that it is consistent with the priority provisions established in this policy. LWDBs are responsible for establishing local procedures to comply with this policy and for conducting outreach to these priority populations.

The following veterans' priority requirements must also be adhered to in determining the priority

of service for the WIOA Adult program:

I. First, to veterans and eligible spouses who are included in the group given priority in the WIOA Adult program (i.e., recipients of public assistance, low-income individuals, or individuals who are basic skills deficient).

II. Second, to non-covered persons (i.e., individuals who are not veterans or eligible spouses) who are included in the group given priority in the WIOA Adult program.

III. Third, to veterans and eligible spouses who are not included in the group given priority in the WIOA Adult program.

IV. Fourth, priority populations established by the LWDB.

V. Last, to non-covered persons outside the groups given priority under WIOA.

Local workforce development area (LWDA) priority of service criteria is to be recorded in SC Works Online Services (SCWOS) to reflect efforts to serve those most in need. The documentation

required for each criteria recorded must be maintained in the participant's case file.

Low-Income Individual

An individual who meets any one of the following criteria satisfies the low-income requirement for WIOA Adult services:

a. Receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received:

- Assistance through the supplemental nutrition assistance program (SNAP) under the Food and Nutrition Act of 2008

- Assistance through the temporary assistance for needy families (TANF) program under part A of Title IV of the Social Security Act

Assistance through the Supplemental Security Income program under Title XVI of the Social Security Act

- State or local income-based public assistance

b. An individual in a family with a total family income that does not exceed the higher of the poverty line or 70% of the lower living standard income level (LLSIL). Please see the most updated state instruction letter *Updated Federal Income Guidelines* for more information.

c. An individual with a disability whose own income does not exceed the higher of the

poverty line or 70% of the LLSIL.

d. A homeless individual as defined in the McKinney-Vento Homeless Assistance Act or the Violence Against Women Act of 1994.

NOTE: Each low-income scenario is detailed in the memorandum *Validation of Data Element – Low Income Status at Program Entry*.

Basic Skills Deficient

Adult Participants interested in Individualized Career Services and/or Training Services through the WIOA program will be assessed to determine whether or not they meet the definition of Basic Skills Deficiency. Assessments related to Basic Skills Deficiency will be facilitated after eligibility is determined. Per State Instruction 26-01 “WIOA defines basic skills deficient as an adult unable to compute or solve problems, or read, write or speak English, at a level necessary to function on the job, in the participant’s family, or in society. The SC Department of Employment and Workforce (SCDEW) further defines basic skills deficient as an individual who meets any one of the following indicators:

- Lacks a High School Diploma or Equivalent;
- Scores a National Reporting System (NRS) level 4 or below on the TABE 13 & 148. Scores less than 4 on any one or more of the following WIN Ready to Work Assessments:
- Applied Mathematics
- Reading for Information
- Locating Information
- Is enrolled in Title II Adult Education, including English as a Second Language (ESL), excluding stand-alone occupational skills training.

It is expected that basic skills deficiency will be determined using an objective, valid and reliable assessment, such as the indicators listed above. When a formal evaluation is not available or practical, case manager observations, customer acknowledgement, and documented case notes are acceptable.

WIOA Title I funds cannot be used for assessment of basic skills deficiency prior to eligibility certification. Further if not already a program participant, the use of funds for assessment will constitute enrollment in the program.

Ronald Mitchum, Executive Director
BCDCOG

September 22, 2026
Date

MEMORANDUM

Date: September 22, 2026
To: Trident Workforce Development Board
From: Ronald Mitchum, Executive Director
Subject: Eligible Training Provider Policy Revision

To ensure that participants enrolled in Workforce Development training programs receive the practical skills and competencies necessary to obtain industry-recognized credentials and secure employment, the following requirement is proposed for inclusion in the Eligible Training Provider List (ETPL) policy:

Training programs that prepare individuals for skilled trades, including but not limited to welding, masonry, carpentry, manufacturing, and similar occupations requiring practical skill development, must include hands-on, instructor-guided training that allows students to develop and demonstrate job-related competencies through supervised practice. Training programs that prepare individuals to work as healthcare providers, including but not limited to registered nurses, paramedics, and similar occupations requiring clinical or practical skill development, must include appropriate hands-on, instructor-guided training and supervised practical or clinical experience consistent with applicable industry and credentialing requirements. Online-only training will not be approved for these types of programs.

Providers seeking ETPL approval for programs in these occupational areas must prove that their program includes sufficient in-person, hands-on instruction and guided practice. This is essential to adequately prepare participants for the skills, credentials, and employment opportunities associated with these occupations.

The purpose of this requirement is to ensure that ETPL-approved training offers meaningful opportunities for participants to practice essential occupational skills in environments that accurately reflect workplace standards and credentialing requirements.



**Trident Workforce Development Board
Workforce Innovation and Opportunity Act
ELIGIBLE TRAINING PROVIDER (ETP) POLICY**

TO: SC Works Trident Operator/Staff

ISSUANCE DATE: September 22, 2026

EFFECTIVE DATE: September 22, 2026

SUPERSEDES: April 11, 2023, October 12, 2021, December 10, 2019, April 24, 2018, September 27, 2016, July 31, 2013, May 15, 2012, November 8, 2011, July 27, June 30, 2008

SUBJECT: Eligible Training Provider (ETP) Policy

Purpose:

According to the SC Department of Employment and Workforce (SCDEW), the Eligible Training Provider List (ETPL) and the process is part of the strategy for achieving the WIOA goals of informed participant choice, system performance, and continuous improvement. The intent of the ETPL is to identify training providers and programs whose performance qualifies them to receive WIOA-funded training. The eligible training provider process should be administered in a manner to assure that significant numbers of competent providers, offering a wide variety of training programs and occupational choices, are available to participants.

POLICY:

With the move to WIOA, we will be measured on a “credential rate” for Youth, Adults, and Dislocated workers who participate in training. The outcome measures of employment, retention, and earnings are now the only ones for this population. With that in mind, “training programs” should directly impact these measures for all individuals who receive training.

PROCEDURES:

The following guidelines shall be used for current and future occupational training programs relevant to the ETPL. Here are the instructions to follow should a provider contact us to be added to the ETPL:

- The Provider will follow the instructions listed on <https://scpath.org> under I am a Training Provider.
- SCDEW will review the application for completeness and make a content-only determination.
- SCDEW will send a notification via email with a list of programs awaiting local administrator approval in the Trident Local Workforce Development Area.

- The rating sheet established by the TWDB will be used to determine approval of the Local Area list of programs.

Local policies, procedures, and guidelines have been established in conjunction with the State's requirements to assure training options available to WIOA participants will lead to job placement, retention, and self-sufficient wages. The Trident Workforce Development Board will invest funds in training programs that fall under the established industry clusters for the tri-county area and South Coast region. Participants are required to consider these industry clusters. The industry clusters are as follows:

- **Diversified Manufacturing**
- **Transportation & Logistics**
- **Healthcare**
- **Communications/IT Services**
- **Construction/Trades**
- **Hospitality and Tourism**

If the Local Workforce Development Board denies eligibility for a listing of a provider's program on the ETPL, the denying entity must, within 14 calendar days of this decision, inform the provider in writing and include the reason(s) for the denial and complete information on the appeal process. WIOA students currently enrolled in such a program will be allowed to complete the program. If a training provider chooses to appeal, a training program that is subject to removal shall remain on the State ETPL until the appeal is concluded. If the local area upholds the original decision, an appeal can be made to SC DEW.

A provider choosing to appeal a decision must submit a written appeal to the Local Workforce Development Board, within 30 calendar days of the issuance of the denial notice. The written appeal must be submitted to the local area and must include:

- a statement of the desire to appeal;
- specification of the program in question; and
- Specifically and in detail the grounds and the reasons upon which it is claimed that the denial was erroneous.

Eligible training provider programs that do not meet the criteria based on the rating sheet will not be added to the local area ETPL. Waivers to the criteria must first be approved by the Performance Review Committee and then by the TWDB.

All programs must submit:

- **A full outline and nationally recognized curriculum of the training**
- **List of books that will be given to participants**
- **A copy of the Instructor's certification**
- **Name of Exam to become credentialed and where they will take the exam**
- **Providers will be given 14 calendar days to provide the information. If the information is not provided, the program will be suspended until information is provided.**
- **Training programs that prepare workers for skilled trades (such as welding, masonry, carpentry, and manufacturing, etc.) and that prepare workers to be healthcare providers (such as registered nursing, paramedic, etc.) must have hands-on instruction so students can learn by guided practice. No online training will be allowed for these types of training programs.**

Performance:

Programs must have an overall rating score of 75% or above on the scorecard for the program year.

Programs must follow the outline and curriculum as submitted.

Below is the process to determine if training providers are to remain on the Local Eligible Training list.

- **The scorecard will be provided to training providers at the end of each quarter.**
- **Training providers below a score of 75 will be given the opportunity to submit updated information.**
- **Programs scoring below a score of 75 after two quarters will receive a notification of the score and be given the opportunity to submit an improvement plan to increase their performance outcomes within 20 business days of receipt of notification.**
- **If the score remains below 75 after two additional quarters (after 1 year), the program will be placed on a probationary period and would be required to present before the Performance Review Committee to explain their plans for performance improvements.**
- **If after the following quarter, no improvements have been made, the Provider will be removed from the local ETPL.**

As part of the performance improvement plan, no more than five participants will be referred at a time. The outcomes of the participants will determine if additional referrals are made.

The Trident Workforce Development Board reserves the right to negotiate terms of payment with each training provider.

The Workforce Innovation and Opportunity Act (WIOA) program does not make referrals to training providers. WIOA staff will follow the following process for all participants :

- **All participants will receive eligibility and enrollment in the WIOA program**
- **All participants will be provided career guidance and counseling**
- **All participants will be provided instructions on the use of SCPATH to review training available for their career choice.**
- **WIOA staff does not provide individual information on participants prior to training approval.**
- **ONLY WIOA staff has training approval authority for WIOA participants.**
- **It is the participant's choice. Participants will choose their training based on the information listed in SCPATH. All participants will follow this process to ensure WIOA regulations and guidelines are being adhered to. This process applies even if a participant is referred by a specific training provider.,**
- **Training Providers are not allowed to modify approved training without the consent of the WIOA staff. This means that the training provider cannot change the approved training unless WIOA staff sends a modified voucher.**

Ronald E. Mitchum, Executive Director
BCDCOG

September 22, 2026
Date

MEMORANDUM

Date: September 22, 2026
To: Trident Workforce Development Board
From: Ronald Mitchum, Executive Director
Subject: Adult, Dislocated Worker and Youth Statement of Work (SOW) for PY2026 Update

The Statement of Work (SOW) outlines the expectations and programmatic goals for the upcoming program year. The SOW was approved for PY2026 at the June 2, 2026 TWDB meeting. However, the local workforce development area performance negotiations for PY2026 and PY2027 were not completed at the time. The SOW has been updated to include the negotiated performance benchmarks.



WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)
STATEMENT OF WORK
SC WORKS THE PROVISION OF WIOA SERVICES FOR ADULT AND DISLOCATED WORKERS
PROGRAM YEAR 2026

Ross Innovative Employment Solutions (IES), hereinafter referred to as the “Contractor”, having entered into a contractual agreement with the Berkeley Charleston Dorchester Council of Governments (BCDCOG), hereinafter referred to as the Administrative Entity for the Trident Workforce Development Area, shall perform the functions outlined pursuant to the provisions and regulations of the Workforce Innovation and Opportunity Act of 2014 (WIOA) (Public Law 113-128, July 22, 2014).

Workforce Innovation and Opportunity Act Purpose

WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. WIOA has six main purposes:

1. Increasing access to and opportunities for employment, education, training, and support services for individuals, particularly those with barriers to employment;
2. Supporting the alignment of workforce development, education, and economic development systems in support of a comprehensive, accessible, and high-quality workforce development system;
3. Improving the quality and labor market relevance of workforce development, education, and economic development efforts;
4. Promoting improvement in the structure and delivery of services;
5. Increasing the prosperity of workers and employers; and
6. Providing workforce development activities that increase employment, retention, and earnings of participants and that increase postsecondary credential attainment and as a result, improve the quality of the workforce, reduce welfare dependency, increase economic self-sufficiency, meet skill requirements of employers, and enhance productivity and competitiveness of the nation.

OVERVIEW OF EXPECTATIONS

- Carry out the provisions outlined in TEGl: 16-16 and TEGl 19-16
- All recruitment material/advertisements must include a contact number and the following statement: “Trident Workforce Development Board provides equal opportunity programs. Services are available upon request to individuals with disabilities. TTY: 711”
- The American Job Center network is a unifying name and brand that identifies online and in-person workforce development services as part of a single network. Any material, websites, and other communications must include the appropriate logo and the phrase, “Proud Partner of the American Job Center Network”.
- The Contractor is expected to follow WIOA law and final regulations, all TEGls, State Instructions letters, and local policies. All participants in this program must be residents of Berkeley, Charleston, or Dorchester Counties and meet WIOA eligibility and entry guidelines established

by the Federal WIOA law and regulations, the South Carolina Department of Employment & Workforce, and TWDB.

- The TWDB has sole authority for the oversight, monitoring, and evaluation of the performance of the duties performed by the Program Service Provider.
- TWDB will support the creation of an environment of impartiality to ensure fairness and equitable distribution of referrals, resources, and resource deployment (as it relates to space allocation, resource sharing agreements), grievance procedures, shared/common instruction letters/policies, and procedures.
- Travel accommodations must be within the GSA rates and guidelines.
- All contracts must be approved, including modified budgets or changes to budgets.
- All decisions, including expenditures, must be supported with proper documentation.
- All expenditures must be reasonable and necessary. The program service provider will provide sufficient documentation to demonstrate compliance with WIOA, corresponding regulations, and relevant OMB circulars. All costs will be supported with documentation that demonstrates reasonableness, allowability, and allocability.
- Case Notes will be created in SC Works Online Services (SCWOS) within 72 hours after services are rendered.
- Program design must include career pathways to non-traditional career fields. See TEGL 19-16 for the definition of non-traditional career pathways.
- As part of the preparation for employment, staff should work with participants to ensure they have a professional resume. This resume should be uploaded in the documents section and the resume section in SCWOS. If the resume is still a work in progress, it should be set to offline until the resume has been updated.
- **The provider of Adult and Dislocated Worker (DLW) services will serve a minimum of 500 participants during the program year of the contract. The contractor is expected to strive to serve more than the minimum. The number expected to be served is subject to change based on the current situation and local funding. The provider must meet at least 80% of this goal. Less than 80% is not meeting.**
- **The provider will maintain a minimum caseload of 70 per Career Coach. If they are a Youth-only Career Coach, the minimum is 50.**
- Recruiting strategies should include partnering with community organizations and information sharing between local area partners and providers.
- Outreach services outside of the centers should also be included in the recruitment efforts in an attempt to engage participation in the WIOA programs.
- All participants in this program must be residents of Berkeley, Charleston, or Dorchester Counties and meet WIOA eligibility and entry guidelines established by the Federal WIOA law and regulations, the South Carolina Department of Employment & Workforce, and TWDB. An exception for the residency requirement must be pre-approved in writing by the BCDCOG Executive Director.
- A minimum of a seventy percent (70%) participant cost rate is required for program cost category expenditures.

- All Businesses served must be located in Berkeley, Charleston, and Dorchester Counties. Exceptions for employers must be pre-approved in writing, by the Executive Director of the BCDCOG.
- 75% of customers served MUST be in the priority of the service group:
Priority must be provided in the following order:
 1. First, veterans and eligible spouses who are also included in the groups are given statutory priority for WIOA Adult formula funding. This means that veterans and eligible spouses who are also recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient would receive priority for services with WIOA Adult formula funds for individualized career services and training services.
 2. Second, to non-covered persons (that is, individuals who are not veterans or eligible spouses) who are included in the groups given priority for WIOA Adult formula funds.
 3. Third, to veterans and eligible spouses who are not included in WIOA's priority groups.
 4. Fourth, priority populations established by the Governor and/or Local WDB.
 5. Last, non-covered persons outside the groups are given priority under WIOA.
 6. Customers not in the Priority of Service Group should only receive training if they meet the self-sufficiency definition in the Trident Area and have demonstrated a need for services. See Self-Sufficiency Definition Policy for more details.

The one-stop delivery system is the foundation of the workforce system. The system provides universal access to career services to meet the diverse needs of adults. The Contractor for the adult program is a required partner in the one-stop delivery system and is subject to the required partner responsibilities. Career and training services, tailored to the individual needs of jobseekers, form the backbone of the one-stop delivery system. While some job seekers may only need self-service or other basic career services like job listings, labor market information, labor exchange services, or information about other services, some job seekers will need services that are more comprehensive and tailored to their individual career needs.

SC WORKS REQUIRED PARTNERS

The Contractor will coordinate the SC Works services offered by required partners and other entities that may serve as one-stop partners. Public Law 113-128 (Section 121(b) (1) (B) of WIOA identifies the entities that are required partners in the local one-stop system. The required partners are:

WIOA T-I Adult, DW, Youth	Migrant Seasonal Farmworkers
Wagner-Peyser	Veterans
Adult Education and Literacy	Youth Build
Vocational Rehabilitation	Trade Act
Career, Technical Education	CSBG (Community Action)
Title V Older Americans Act	HUD
Job Corps	Unemployment Compensation
Native American Programs	Second Chance
Temporary Assistance for Needy Families (TANF)	

PROVISION OF SC WORKS CENTER OPERATIONS:

- The Trident Local Workforce Development Area (LWDA) will follow the state-issued guidance regarding the certification of the SC Works Centers and the SC Works delivery system.
- Local Boards are responsible for the assessment of the comprehensive and satellite/affiliate centers and the SC Works delivery system against the standards outlined in the State Instructions.
- The Contracted Program Service Provider is responsible for ensuring the Jobseeker Services are met.
- The Contracted Program Service Provider should follow all TEGLS with attention to TEGl 04-15 and any other TEGLS pertinent to the operations of the centers. The Contracted Program Service Provider will adhere to local policies and procedures and the WIOA final regulations.

SC Works Center services are currently provided in each county. Agencies representing the partners may vary from county to county. The SC Works Charleston Center serves as the comprehensive SC Works Center in the Trident Region.

<i>Geographic Area</i>	<i>Location:</i>
Berkeley	Berkeley Prosperity Center 500 S. Live Oak Dr., Moncks Corner, SC 29461
Charleston	SC Works Charleston (Comprehensive Center) 1930 Hanahan Road Suite 200, North Charleston, SC 29406
Dorchester	SC Works Dorchester 1325-D Boone Hill Road, Summerville, SC 29483

The SC Works Trident Program Service Provider will be required to collect, review and report monthly services provided within the centers to the Administrative Entity. These reports should detail the numbers of persons processing through each category and the disposition of participants to SC Works/One-Stop partners and contracted service providers. Special emphasis within the reporting process should be placed on the referral of non-UI Adults to the WIOA component of the SC Works One-Stop System.

CUSTOMER SERVICES

Under WIOA, One-Stop centers, their partner programs, and entities that are jointly responsible for the workforce and economic development, educational, and other human resource programs collaborate to create a seamless customer-focused one-stop delivery system that integrates service delivery across all programs and enhances access to the programs' services. The one-stop delivery system includes six core programs: (Title I Adult, Dislocated Worker, and Youth programs, Title II Adult Education and Literacy programs, Title III Wagner-Peyser program, and Title IV Vocational Rehabilitation programs) as well as other required and optional partners identified in WIOA. Through the one-stop centers, these

partner programs and their service providers ensure that businesses and job seekers have a shared client base. The customers will have access to information and services that lead to positive employment outcomes.

Career Services:

In collaboration with SC Works Partners, the Contractor is responsible for the provision of WIOA Career Services. The Contractor is to follow all State Instruction Letters and local policies established by the Trident Workforce Development Board. Under WIOA, career services are classified in the following categories:

Basic Career Services are available to all individuals:

- Determinations of whether the individuals are eligible to receive assistance.
- Outreach, intake (which may include worker profiling), and orientation to the information and other services available through the one-stop delivery system.
- Initial assessment of skill levels (including literacy, numeracy, and English language proficiency), aptitudes, abilities (including skills gaps), and supportive service needs.
- Labor exchange services, including-
- Job search and placement assistance and, in appropriate cases, career counseling, including the provision of:
 - Information on in-demand industry sectors and occupations;
 - Information on nontraditional employment;
 - Information from career profiles and interest inventories, and
- **It is expected that the Services Provider will coordinate with the Business Services Team.**
- Referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and, in appropriate cases, other workforce development programs.
- Workforce and labor market employment statistics information including the provision of accurate information relating to local, regional, and national labor market areas, including:
 - Job vacancy listings in such labor market areas.
 - Information on job skills necessary to obtain the jobs.
 - Information relating to local occupations in demand and the earnings, skill Requirements, and opportunities for advancement for such occupation.
- Provision of performance information and program cost information on eligible providers of training services by program, and type of providers, and workforce services by program and type of providers.
- Provision of information in formats that are usable by and understandable to SC Works customers, regarding how the local area is performing on the local performance accountability measures and any additional performance information to the one-stop delivery system in the local area.
- Provision of information in formats that are usable by and understandable to SC Works customers, relating to the availability of supportive services or assistance to include the

following: child care, child support, medical or child health assistance under title XIX or XXI of the Social Security Act, benefits under the supplemental nutrition assistance program (SNAP) established Food and Nutrition Act 2008, assistance through the earned income tax credit under section 32 of the Internal Revenue Code of 1986, and assistance under a State program for temporary assistance for needy families funded under part A of title IV of the Social Security Act and other supportive services and transportation provided through funds made available under such part, available in the local area; and referral to the services or assistance as described above provision of information and assistance regarding filing claims for unemployment compensation.

- Assistance in establishing eligibility for programs of financial aid assistance for training and educational programs that are not funded under WIOA, if determined to be appropriate for an individual to obtain or retain employment.

Job Seeker Services

The Contracted Program Service Provider shall meet all requirements regarding compliance with State and Federal disability laws and procedures for ensuring universally accessible physical and program environments for all customers. It is required that the Contracted Program Service Provider ensure that the SC Works Centers adhere to the standards and expectations outlined in the national Equal Opportunity Self-Assessment Guides and checklists. The Berkeley Charleston Dorchester Council of Governments will monitor the sites annually for compliance. The Contracted Program Service Provider may be required to attend training in program access for customers with disabilities and access to employment programs and services for the disabled. The Program Services Provider shall ensure that the programs are accessible to all customers by meeting ADA requirements. The Berkeley Charleston Dorchester Council of Governments' EO Officer/contact will handle all complaints.

Individualized Career Services may include:

- Comprehensive and specialized assessments of the skills levels and services needs include-
 - diagnostic testing and use of other assessment tools;
 - and in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.
- Development of an Individual Employment Plan, to identify employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals, including providing information on eligible providers of training services, and career pathways to attain career objectives.
- Group counseling
- Individual counseling
- Career planning
- Short-term prevocational services, including the development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training.
- Internships and work experiences that are linked to careers.

- Workforce preparation activities.
- Financial literacy services.
- Out-of-area job search assistance and relocation assistance.
- English language acquisition and integrated education and training program
- Development of Resumes`

Follow-up Career Services:

Follow-up services, including counseling regarding the workplace, for participants in workforce investment activities, authorized under this subtitle that are placed in unsubsidized employment, for not less than 12 months after the first day of the employment, as appropriate

The Contractor is responsible for coordinating individualized career services in the SC Works Centers. These services include: Assessment, Individual Employment Plan, Group Counseling, Individual Counseling, Career Planning, Short Term Prevocational Services, Internships, and Work Experiences, Financial Literacy Services, and Workforce Preparation Activities, and see the full list outlined in TEG 03-15.

Assessments:

The Contractor is responsible for following the local workforce area policy on assessments. All assessment test results must be recorded on the applicable assessment screen in SCWOS. Basic Skills Deficient individuals as defined in State Instruction Letter 15-17, Change 2. The Contractor will follow any state instruction letters further defining Basic Skills Deficiency. No minimum TABE scores can be required as a stipulation for enrollment into the WIOA programs. TABE cannot be required to be taken before eligibility. Effective July 1, 2021, seventy-five percent (75%) of adult participants must be low-income, including public assistance recipients, or have basic skills deficient. If an individual is not in the "Priority of Service" group, sufficient documentation in case notes and job search logs demonstrating that the individual needs WIOA services to remove barriers to employment.

Training services:

Training Services can be critical to the employment success of many adults and dislocated workers. There is no sequence of service requirements for "career services" and training. This means that SC Works staff may determine whether training is appropriate regardless of whether the individual has received basic or individualized career services first. Under WIOA, training services may be provided if SC Works staff determine, after an interview, evaluation or assessment, and career planning, that the individual:

- Is unlikely or unable to obtain or retain employment, that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career services alone;
- Needs training services to obtain or retain employment that leads to economic self-sufficiency or wages comparable to or higher than wages from previous employment through career

services alone, and has the skills and qualifications to successfully participate in the selected program of training services.

Training services, when determined appropriate, must be provided through an Individualized Training Account (ITA). Training services must be linked to in-demand employment opportunities in the local area or planning region or in a geographic area in which the adult or dislocated worker is willing to commute or relocate. The selection of training services should be conducted in a manner that maximizes customer choice, is linked to in-demand occupations, informed by the performance of relevant training providers, and coordinated to the extent possible with other sources of assistance.

- **Training Services May Include:**

- Occupational skills training, including training for nontraditional employment;
- On-the-job training (OJT);
- Incumbent Worker Training;
- Programs that combine workplace training with related instruction, which include cooperative education programs;
- Training programs operated by the private sector;
- Skill upgrading and retraining;
- Entrepreneurial training;
- Transitional jobs;
- Job readiness training is provided in combination with services described in any of clauses 1 through 8.
- Adult Education and Literacy Activities, including activities of English language acquisition and integrated education and training programs, are provided concurrently or in combination with services described in any of clauses 1 through 7.
- Customized training is conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

Outreach Services:

The Contracted Program Service Provider shall promote the SC Works Trident System services and ensure that the system is viewed as a part of the state of South Carolina's SC Works System. In collaboration with the Trident Workforce Development Board, BCDCOG staff, system partners, the business community, and WIOA partners. The Program Services Provider shall coordinate the development of outreach strategies to ensure effective outreach and communication for recruiting target populations. The Contracted Program Service Provider shall use all mandated brochures developed by the TWDB or the State and propose additional brochures, as appropriate. WIOA consistently emphasizes the need for services targeted to persons with disabilities and individuals with barriers to employment, including individuals who receive public assistance or are otherwise low income and/or basic skills deficient. Outreach and services shall include efforts to encourage the use of the SC Works system by groups that need employment and training services to become more skilled and employable in the path to financial self-sufficiency.

Follow-Up Services:

Follow-up Services must be provided as appropriate for participants who are placed in unsubsidized employment for up to 12 months after the first day of employment. Counseling about the workplace is an appropriate type of follow-up service. Follow-up services do not extend the date of exit in performance reporting.

WIOA sec. 3 (24) defines an “individual with a barrier to employment” means a member of one or more of the following populations:

- Displaced Homemakers
- Low-Income Individuals
- Indians, Alaska Natives, and Native Hawaiians, as such terms are defined in Section 166.
- Individuals with disabilities, including youth who are individuals with disabilities.
- Older individuals
- Ex-Offenders
- Homeless Individuals (as defined in Section 41403(6) of the Violence against Women Act of 1994 (42 U.S.C. 14043e-2(6), or homeless children and youths (as defined in section 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a (2)).
- Youth who are in or have aged out of the foster care system.
- Individuals who are English language learners and individuals who have low levels of literacy, and individuals facing substantial cultural barriers.
- Eligible migrant and seasonal farmworkers, as defined in Section 167(i).
- Individuals within 2 years of exhausting lifetime eligibility under Part A of Title IV of the Social Security Act (42 U.S.C. 601 et seq.).
- Single parents (including single pregnant women).
- Long-term unemployed individuals.
- Other groups as the Governor involved determined to have barriers to employment.

Printed material and other written information at the Center must be language accessible for Trident’s diverse population of job seekers. Whenever feasible, language barriers should be removed so that all visitors to the Center feel welcome and can benefit from the experience. Outreach materials should be available in English and Spanish, when appropriate.

Coordination with Programs under Title IV of the Higher Education Act including Pell Grant and other Financial Aid Sources is required.

Veterans Services:

The Contractor will ensure Veterans are given priority in Eligibility appointments. (Review the Priority of Services for Veterans policy for further details.)

Veterans and eligible spouses of veterans will receive priority of services under all DOL-funded employment and training programs as stipulated in TEGL 5-03. This priority for service applies throughout all phases of WIOA including certification, enrollment, and training. The Contractor is

required to post a notice of priority for services for veterans in an obvious location in the SC Works Center.

CASE NOTES

“If it isn’t documented, it did not happen”!

Case Notes are used throughout the delivery of WIOA services. Case notes should document progress on Individual Employment plans (IEP), document the participant’s progress on meeting their goals, and any changes that occur with the goals and/or objectives. The length of the case note is not important. The value of the content is important. Case notes should include information on missed appointments and attempts to contact. Case notes should include contacts with instructors, employers, etc. to follow the progress in training or employment. For customers in training, case notes should document satisfactory progress, current grade point average, the reasons for extensions in training, etc.

The subject of the case note should be meaningful. The subject should match the content of the case note. (Example: Transportation Problems to Training) and the content MUST include information that defines the activity.

Case notes should support not duplicate information in the activity records and other SCWOS screens. **A case note should be entered at a minimum of every 30 days for all active WIOA customers to show actual communication with customers or attempts at communicating with customers. Contact is considered when there have been communications between both parties. For example, if a message is left and no return response has occurred, this is an attempt to contact and not actual contact. Remember, Case Notes speak in the absence of your presence.**

Priority for Services for Adults - As referenced in Public Law 113-128, title I, Section 134(c)(3)(E), the Trident Workforce Development Board has established priority for individualized career services for adults. Priority for access to career services shall be determined as previously mentioned.

SC WORKS ONLINE SYSTEM/ORIENTATION

The Contractor will be responsible for ensuring that SC Works Trident orientation/informational sessions are provided at least weekly and online. Virtual or online information sessions are a requirement of the SC Works Certification Standards. All SC Works programs require registration in SCWOS and instruction should be provided for registering during the session. Individuals who are interested in pursuing the WIOA program must be provided with an eligibility appointment. No barriers should be put in place to prevent an individual from receiving and/or sitting for an eligibility appointment. The individual will be instructed to bring in eligibility verification documents. If all documents are not brought in at the time of eligibility, complete a partial application to ensure the activity is recorded in SCWOS. All eligibility documents including verification documents must be scanned into SCWOS within 24 hours.

The Contractor will be required to adhere to SCWOS. SCWOS is an online system for WIOA intake, case management, tracking of services, follow-up, and reporting. The WIOA tracking component is designed to help staff better serve WIOA participants and collect accurate information for reporting. Updates to

the SCWOS manuals are available in SCWOS under the Staff Online Resources tab. The Contractor is required to use the document feature in the system to upload and/or scan all documents into the system (except those of confidential nature i.e., medical records, SS Cards, etc.) These documents include but are not limited to verification for Eligibility, Receipt of Information forms, signed ISS, vouchers, training approval documents, documents for supportive services, etc.

Per the South Carolina Department of Employment and Workforce (SCDEW) in State Instruction Number 21-01, the SC Works Online Services (SCWOS) system will be the primary tool used to collect programmatic and fiscal performance data for the dashboard with SCDEW. Implementation of the Advanced Individual Fund Tracking (AIFT) module will support comprehensive fund management capabilities and enable real-time reporting on expenditures related to training programs, supportive services, and other participant activities. The full AIFT module in SCWOS will be used. This means vouchers must be created, approved and payment added to close the vouchers out and track expenditures.

The South Carolina Works Online Services (SCWOS) system is a real-time, online system for WIOA intake, case management, tracking of WIOA/WP/TAA services, follow-up, and reporting. SCWOS was designed with built-in business rules and user-friendly selection lists to ensure data consistency and reduce the number of data entry errors. Text entry has been kept to a minimum (initial input of personal information, case notes, and comments).

ELIGIBLE TRAINING PROVIDER LIST

In light of the passage of the new legislation Workforce Innovation and Opportunity Act (WIOA), there have been substantial changes to the workforce law which includes the Eligible Training Provider List (ETPL) policies and eligibility procedures. The established eligibility criteria and procedures will be made available to State, Local Boards, and WIOA participants, and a list of eligible providers who meet the established criteria will be published. The LWDA will communicate any changes or further instructions regarding the ETPL.

The Contractor may refer participants to eligible service providers only. Eligible service providers are listed in SCPATH.org under Trident. Costs incurred for participants attending institutions/courses of study that are not eligible to receive WIOA funds will be disallowed. Should there be any question about whether an institution and/or course are on the approved list, the LWDA should be contacted.

FACILITATION, PAYMENT & TRACKING OF WIOA PARTICIPANT TRAINING

The Contractor is responsible for payment of ITAs, OJT reimbursements, and, when necessary, supportive service payments to individual participants and to enter amounts paid in the Contractor's financial tracking system. The Administrative Entity's appropriate staff must be given access to financial tracking systems for monitoring purposes.

Communication:

A member of the Contractor's Management staff shall be present at all TWDB meetings.

The Contracted Program Service Provider should maintain and be knowledgeable of all active Trident WIOA/SCWOS Instruction Letters relevant to Operations.

PERFORMANCE STANDARDS

The Contractor's performance standards and other contractual requirements will be evaluated on an ongoing basis to determine the need to de-obligate funds or implement other corrective action if the Administrative Entity determines performance is below standard. This may result in financial penalties.

It is the responsibility of the Contracted Program Service Provider to work with partners, especially those co-located in the centers, to maximize their active participation in the center and to meet and exceed their programs' performance goals. The Contracted Program Service Provider should actively engage partners to make sure they receive the maximum benefit and coordination by being in the Centers.

Below are DOL performance measures: The benchmark for each goal will be disseminated as it is updated.

Performance Measure	PY2026
Adult Employment Rate 2nd Quarter After Exit	80.7%
Adult Employment Rate 4th Quarter After Exit	80.6%
Adult Median Earnings 2nd Quarter After Exit	\$9,995
Adult Credential Attainment Within 4 Quarters After Exit	81.7%
Measurable Skill Gains	70.0%
DW Employment Rate 2nd Quarter After Exit	84.8%
DW Employment Rate 4th Quarter After Exit	84.1%
DW Median Earnings 2nd Quarter After Exit	\$12,058
DW Credential Attainment within 4 Quarters After Exit	76.4%
Measurable Skill Gains	74.1%

The WIOA performance measures are described below:

- **Employment** - To increase employment, as measured by entry into unsubsidized employment (2nd quarter after exit).
- **Employment Retention** - To increase retention in unsubsidized employment six months after entry into employment (4th quarter after exit).
- **Median Earnings** - To increase earnings received in unsubsidized employment (median of 2nd quarter wages after exit).
- **Credential Rate** – To increase credentials or diplomas obtained during or immediately after program exit.
 - *Definition: Percentage of participants who obtain a recognized postsecondary*

credential or diploma during participation or within 1 year after program exit.

- **In-Program Skills Gain** – To increase the skills obtained through education leading to a credential or employment during the program year.
 - *Definition: Percentage of participants in education leading to credentials or employment during the program year, achieving measurable gains. Measured in real-time.*
- **Employer Services** – To indicate effectiveness in serving employers.
 - *Employer Penetration Rate* – the percentage of employer establishments using services out of all employer establishments in the state.
 - *Repeat Business Customers Rate* – the percentage of employer establishments using services during the year that also used services within the previous three years.
- **Credential Rate** – Credential Attainment Within 4 Quarters After Exit

The Trident Workforce Development Board also requires that the Contractor maintain a minimum overall “Satisfactory” customer service satisfaction rating from job seekers and employers. See SC Works Certification Standards.

REPORTING & MONITORING

Monitoring is a primary tool for the identification of strengths and weaknesses in the operation of WIOA programs and the delivery of services at the Contractor level. Monitoring will be performed by LWDA staff, Trident Workforce Development Board (TWDB) members, and others involved in the oversight responsibility of the WIOA program.

Monitoring will begin as soon as the contract is fully executed and will be ongoing. The review will cover all aspects of each Contractor’s operation using desk-top and on-site monitoring techniques. The Contractor acknowledges the right and responsibility of the Workforce Development Board and/or its representatives, the State Administrative Entity, and the US Department of Labor (DOL) and/or its representatives under provisions of the WIOA to conduct program oversight or monitoring on an announced and/or unannounced basis where WIOA funds are expended. The Contractor shall further assist cooperatively the agents or representatives of the aforementioned entities when conducting on-site monitoring or audits of WIOA-funded program activities. The Trident Workforce Development Board may impose sanctions on the Contractor when continued non-compliance with this contractual agreement, other policies and procedures of the Workforce Development Board, and the Workforce Innovation and Opportunity Act of 2014 and/or its regulations exist. The Trident LWDA will follow the State’s Instruction Letter 12-12.

FINANCIAL MANAGEMENT REQUIREMENTS

Monthly Financial Status Reports, Requests for Payment Invoices, and Status of Funds Reports are due to the BCDCOG within 10 days after the end of the period.

Monthly Financial Status Reports, Requests for Payment Invoices, and Status of Funds Reports (where applicable) are due to the BCDCOG by 5:00 pm on the tenth (10th) calendar day of the month. If the

tenth falls on a Saturday or Sunday, the reports are due the preceding Friday by 5:00 pm. Late reports and requests will not be processed until the tenth of the following month. Failure to submit financial reports per the LWDA's guidelines will be documented and noted in monitoring and performance evaluation reports.

Budgeted expenses for meetings and/or conferences are allowable when their primary purpose is the dissemination of technical information relating to the WIOA program and when they are consistent with regular practices and local travel policies followed for other activities of the contractor. Allowable costs under WIOA contract awards must be necessary and reasonable for the proper and efficient administration of the program, be justifiable, and be by applicable OMB circulars.

The contractor shall establish, maintain, and utilize internal program management procedures sufficient to provide for the effective management of all activities funded in whole or in part under this Agreement.

The contractor shall not purchase, lease, rent, trade, transfer or dispose of any non-expendable personal property without prior approval of the Administrative Entity. It is understood and agreed by the parties hereto that title to any non-expendable personal property furnished by the US Department of Labor or the Awarding Entity to the contractor for use in connection with programs under this Agreement shall remain vested in the Awarding Entity.

The Operator is the custodian of all assets belonging to the BCDCOG located at SC Works Facilities. An asset Change Form must be submitted to the Operator for all WIOA assets that are relocated, purchased, or removed. All disposals must have prior written approval by the Operator.

The Local Workforce Development Areas (LWDAs) receive a small percentage of their total Adult and Dislocated Worker allocations at the beginning of the program year. The remaining amount becomes available on October 1. No large expenditures, other than training-related costs, will be approved before October 1.

The Contractor will keep a log of all customer service complaints received and the disposition of such complaints. The Contractor will advise the Trident Workforce Development Director immediately if a complaint is filed. This report is due on the 15th day after the quarter-end.

The Contractor shall not enter into sub-contracts for any work contemplated under this Contract and shall not assign this Contract or monies without the prior written consent of the Executive Director or designee.

CUSTOMER FILE MAINTENANCE

Storage space should be maintained in the Comprehensive Center to protect the Personal Identifying Information and confidentiality of the Exited files and store for the appropriate time frame. See Record Retention and the Accessibility, Confidentiality, and Reasonable Accommodation policies for

additional information.

GENERAL

The Contractor agrees to abide by Local Workforce Development Area regulations to ensure that funds are made available for services/training that are required to meet the needs of the participant.

All forms, documents, and information of the Contractor about this contract or mentioned herein will be made available to the Administrative Entity upon request and are subject to review at any time. The Contractor shall maintain records that are sufficient to permit the preparation of reports required by WIOA and to permit the tracking of funds to a level of expenditure adequate to ensure that funds have not been spent unlawfully (Sec. 185 of the WIOA).

All instruction letters and policies, unless otherwise instructed, will still apply under WIOA.

The Contractor shall reimburse any costs determined to be disallowed in connection with the operation of the WIOA contract to the Berkeley Charleston Dorchester Council of Governments (BCDCOG) from non-WIOA fund sources.

The Contractor shall have all partly or fully WIOA-funded staff persons participate in and support professional development efforts initiated or approved by the BCDCOG or Contractor, including regularly announced service provider meetings and appropriate conferences and workshops.

The Contractor shall establish an in-house policy and procedure for recouping non-expendable training equipment (items designed to last more than one year when a WIOA customer leaves training early).

The Contractor acknowledges the right and responsibility of the Trident Workforce Development Board and/or its representatives, the South Carolina Department of Employment & Workforce and/or its representatives, and the US Department of Labor (DOL) and/or its representatives under provisions of the WIOA to conduct program oversight or monitoring on an announced and/or unannounced basis where WIOA funds are expended for WIOA program activities. The Contractor shall further assist cooperatively with the agents or representatives of the aforementioned entities when conducting on-site monitoring or audits of WIOA-funded program activities.

Any changes or modifications to this contractual agreement shall be detailed in writing and executed by both parties. The Contractor may initiate changes or modifications in letter format at any time. Changes or modifications required because of changes in the Workforce Innovation and Opportunity Act or new decisions of the BCDCOG may be made at any time during the period of the contractual agreement.

The Contractor will ensure that all adhere to the records retention requirements as indicated in the Terms and Conditions of this agreement. The Contractor may retrieve the records to ensure that auditable records are available and readily accessible.

It is understood that all major work elements associated with this agreement are outlined in the work statement, terms and conditions, and instruction letters issued by the BCDCOG. However, because employment and training programs are constantly evolving at the federal, state, and local levels and, in the spirit of teamwork and cooperation, Contractors will often be required to perform functions that are not included in these documents. If should occur, full instructions will be provided in the form of an amendment or other specific instructions detailing the change(s)/additional work required.

Staffing:

Timesheets shall be made available to BCDCOG staff during monitoring. The BCDCOG reserves the right to provide input into the hiring and termination of WIOA-funded staff. The Contractor will submit to BCDCOG staff in writing the following items:

- The names of New WIOA hires or resignations/terminations for any reason.
- SCWOS Staff-account activations, changes (within 2 days of hire or change), and deactivations (within 24 hours).

As part of the hiring process, the contractor is required to inform potential hires that their acceptance of a position under this contract agreement neither makes them federal employees nor does it make them employees of Berkeley Charleston Dorchester Council of Governments (BCDCOG). The BCDCOG approves funding for specific positions but does not make personnel decisions for its contractors. However, it is further understood that employees whose positions are funded under the terms of this contract agreement have the right to use the BCDCOG's grievance procedures to challenge a personnel decision that directly affects their employment with the contractor. Unless an employee is unable to access his/her employer's grievance process for some reason, such as its unavailability to temporary contract employees, affected employees must demonstrate that they have utilized the grievance process established by the contractor before filing a grievance with the BCDCOG. The BCDCOG's role in all grievances presented at the LWDA level is to determine whether or not the contractor complied with its personnel policies and procedures as it relates to the specific action the employee is grieving.

The Contractor promises and attests that the Contractor and any members of its staff and governing body shall avoid any actual or potential conflicts of interest.

The Contractor shall schedule appropriate training sessions for all new and existing WIOA-funded staff, including scheduling an orientation session with the WDB staff within one week of the WIOA employee's start date.

Travel costs for personnel supported by the contract award are allowable when the travel is specifically related to the operation of programs under the Act, and directly benefits the Trident Workforce Area. Payment for travel shall be made only as it applies to the scope of the contract, is necessary and reasonable, and follows all local travel policies. All travel expenditures must follow GSA rates and guidelines.

The Contractor will ensure that, if necessary, due to Rapid Response efforts, personnel vacancies, or

changes in program design, Center staffing schedules will remain flexible to accommodate customer needs.

The Contractor shall provide ongoing training to WIOA-funded staff on aspects of the Americans with Disabilities Act and training on meeting their accommodation needs and effectively communicating with individuals with disabilities.

The Contractor shall provide documented in-depth WIOA program orientation as follows:

- All staff funded under this contract shall receive training on the Work Statement customer data system, financial procedures, WIOA Regulations, and Terms and Conditions. Signed statements by the staff certifying this training will be submitted to the Berkeley Charleston Dorchester Council of Governments within ten (10) days of receipt of the signed contract.

All front-line staff should maintain a copy of the work statement at their workstation for reference.

When questions arise, the work statement should be reviewed before requesting assistance from the LWDA.

With the increased emphasis on customer satisfaction under the Workforce Innovation and Opportunity Act and the SC Works Certification Standards, the Contractor will conduct ongoing customer service training with staff and other partner staff. Workforce Center staff will participate in any training provided by the Trident WDB.

Staff should not be absent from the SC Works Centers without adequate coverage.

The contractor will ensure that sufficient qualified staffing will be available to ensure the successful performance and effective management of the SC Works Trident Centers. Staff will be familiar with the requirements of WIOA and related Federal Regulations, the terms of this contract, and WDA instructions. **Poor staff performance in managing the SC Works centers may result in the Program Services Provider facing financial penalties.**

The BCDCOG should be informed of new hires and staff changes. An updated organizational chart is required when there is a change in the management staff levels.

TWDB POLICIES/INSTRUCTIONS

All WIOA contractors must adhere to the policies, procedures, and instructions as set forth by the TWDB and WIOA. All applicable policies, forms, and instructions will be provided to the Contractor.

CONTINUOUS IMPROVEMENT

Purpose/Meaning of Continuous Improvement:

Continuous Improvement means that there is always room for improvement. No matter how closely excellence is approached, we can always do better. This means that we must constantly look for ways to improve our performance. Quality Improvement Tools must be employed by the Contractor to

identify improvement opportunities, identify root causes and best solutions, monitor improvement opportunities, and measure results. The Contractor is responsible for employing Continuous Improvement principles to ensure quality is built into the services and programs being provided. The Contractor must design processes, programs, and services that enable them to exceed customer expectations and provide a fair return on investment (ROI) to the Trident Workforce Development Board. Pertinent instructions, procedural information, and training will be provided to ensure Contractors become familiar with and effectively implement continuous improvement practices into all WIOA program operations.

Contractor Continuous Improvement Team (CCIT):

To ensure that Contractors are provided guidance and technical assistance regarding TEGLS, State Instruction Letters, and local policies and procedures, the contractors will attend the monthly Contractors Continuous Improvement Team (CCIT) meetings. This will be a time when the BCDCOG Staff will provide technical assistance, address any potential programmatic issues, and distribute information.

In-Service Training:

BCDCOG staff may provide mandatory training for the Contractor on subjects relevant to the program operation, performance, and continuous improvement principles. The In-Service Training times may be scheduled in conjunction with the monthly CCIT meeting.

PUBLICATIONS The Contractor agrees that any publication (written, visual, signs for posting or sound, including press releases, but excluding newsletters, and Issue analyses) issued by the Contractor describing programs or projects funded in whole or in part with federal funds, shall contain the following statement: “Trident Workforce Development Board provides equal opportunity programs. Services are available upon request to individuals with disabilities. TTY: 711”.

The Contractor also agrees that one copy of any such publication will be submitted to BCDCOG to be placed on file and distributed as appropriate to other potential Contractors or interested parties. The BCDCOG may waive the requirement for submission of any specific publication upon submission of a request justification from the Contractor.

COPYRIGHT

Except as otherwise provided in the terms and conditions of this agreement, the Contractor paid through this agreement is free to copyright any books, publications, or other copyright-able materials developed in the course of or under this contract. However, the U.S. Department of Labor (federal awarding agency), South Carolina Department of Employment & Workforce, and/or BCDCOG reserve a royalty-free, non-exclusive, and irrevocable license to reproduce, publish, or otherwise use, and authorize others to use, for the federal government, state, or county purpose; the copyright in any work developed under this agreement or through a contract under this agreement; and any rights of copyright to which a Contractor or sub-contractor purchases ownership with WIOA funding support.

The federal and state government's rights, and/or the county's rights identified above must be conveyed to the publisher and the language of the publisher's release form must ensure the preservation of these rights.

OPTION TO EXTEND

Based upon funding availability, the BCDCOG may extend an agreement period of performance if it appears to be in the best interest of the BCDCOG and is agreeable with the Contractor. The total extension may be less than but may not exceed two (2) additional years and may be issued in increments. Similarly, the slot levels and/or the number of participants served and/or associated costs may be adjusted at any time during the agreement period if agreeable with the Contractor and BCDCOG. An extension may be contingent upon the satisfactory performance of this contract.

BUDGET

A copy of the negotiated detailed budget is attached.

SPENDING PLAN

The Contractor will ensure that 25% of the funds are expended by September 30th; 50% of the funds are expended by December 31st, and 75% of the funds are expended by March 31st and 90% by June 30th. If funds are not expended per the attached sanctions policy, the Contractor may face sanctions.

PAYMENT TERMS

No funds will be paid for persons not certified, eligible, enrolled, and initiated as required in the WIOA federal regulations.

TWDB reserves the right to de-obligate underruns that accrue as the result of poor performance or under expenditure. Determinations regarding the amount of the obligation may be based on Contractor reports (financial or programmatic).

The performance of activities may be terminated by the BCDCOG in whole or in part for either cause or convenience as outlined in the Terms and Conditions.

Failure to meet performance on the local, state, and DOL levels may result in penalties. Please see Appendix A – Unsatisfactory Performance Fees.

Payment may not be made for expenses not incurred or earned during the contract period.

The Contractor may not over-expend any negotiated budget line item over 10% without prior authorization. Authorization of any over expenditure of more than 10% must be requested in writing and is subject to approval by the BCDCOG.

Without regard to the date of the parties' signatures, the parties agree that the effective date of this agreement is July 1, 2026.

IN WITNESS WHEREOF, the Parties hereto have executed this Contract under their several seals the day and year first written above.

Ross Innovative Employment Solutions

BCD Council of Governments:

Shawn Brenner
Chief Executive Officer

Ronald E. Mitchum
Executive Director

Attest:

Attest:

MEMORANDUM

Date: September 22, 2026
To: Trident Workforce Development Board
From: Ronald Mitchum, Executive Director
Subject: Corrective Action Plan for Youth Non-Performance

On June 2, 2026, the Trident Workforce Development Board approved placing Ross IES, the Youth Program Service Provider, on a corrective action plan (CAP) due to performance issues, including failure to meet enrollment goals and falling below the expected fund utilization rate. The CAP includes the following requirements:

- Each staff member must serve a minimum of two individuals per day.
- Eligibility and enrollment services will be provided on-site at high schools and at pop-up events in rural communities to increase enrollments.

The objective is to boost enrollments, which will subsequently improve the expenditure rate.

Ross IES submitted a response to the CAP outlining their approach to meeting the requirements. The number of individuals served per day has increased to an average of 2 -3 per day. The current youth enrollment is 64, with 13 enrolled since July 1, 2026.

The Performance Review Committee convened on August 26, 2026, and made the following recommendations regarding the CAP:

- Maintain the CAP until at least October 28, 2026, to ensure that Ross IES is effectively implementing the action steps outlined in their response to the CAP.
- Confirm that the CEO attends the TWDB meeting on September 22, either in person or virtually, to address any questions related to their performance.
- Consider a reorganization of the program structure.

The CAP from BCDCOG and Ross IES's response, along with an addendum from Ross IES, are attached.

Recommendation: Approve the recommendations from the Performance Review Committee.

CHAIR: Gary Brewer • **VICE CHAIR:** David Dennis • **SECRETARY:** Mike Seekings • **TREASURER:** David Chinnis • **EXECUTIVE DIRECTOR:** Ronald E. Mitchum

June 3, 2026

Ms. Shawn Brenner, CEO
Ross Innovative Employment Solutions
7800 W Brown Deer Road
Second Floor
Milwaukee, WI 53223

RE: Workforce Innovation and Opportunity Act (WIOA) Non-Performance

Dear Ms. Brenner:

During the Trident Workforce Development Board (TWDB) meeting on June 2, 2026, it was determined that Ross Innovative Employment Solutions (Ross IES) would be placed on a corrective action plan due to a low fund utilization rate (FUR) and low enrollment in the WIOA Youth program.

As outlined in the Youth Statement of Work, the contractor is required to meet both the Fund Utilization Rate and enrollment goals. Currently, Ross IES is not meeting the enrollment goals and is below the expected fund utilization rate. This shortfall jeopardizes the TWDB and the Berkeley, Charleston, and Dorchester Council of Governments (BCDCOG) in meeting the South Carolina Department of Employment and Workforce's performance goal of 70% expenditure by the end of the program year on June 30, 2026. As a result, you are required to submit a written corrective action and implementation plan for approval within 15 business days of receiving this memo. Additionally, Ross IES must demonstrate significant improvements in performance within 60 days, by July 31, 2026.

At a minimum, the plan should include:

- Each staff member must serve a minimum of two individuals per day.
- Provide eligibility and enrollment services on-site at high schools and pop-up events in the rural communities

Failure to demonstrate required performance measures will result in termination of the youth contract.

If you have any questions, please contact Andrea Kozloski, Deputy Director of Operations and Support, at 843-529-2125 or andreak@bcdco.com.

Sincerely,



Ronald E. Mitchum
Executive Director

Memo

To: Trident Workforce Development Board Ronald E. Mitchum, Executive Director
From: Anna Cumberledge, Regional Director
CC: Shawn Brenner, CEO; Lynn Fournier, VP Contracts Management
Date: 7/17/26
Subject: RE: Corrective Action Plan – Youth Program Performance and Fund Utilization

Dear Mr. Mitchum,

This Corrective Action Plan (CAP) is in response to notice issued by the Berkeley-Charleston-Dorchester Council of Governments related to enrollment levels and fund utilization within the WIOA Youth Program.

Ross Innovative Employment Solutions takes these concerns seriously and has developed this CAP to strengthen staff productivity, expand on-site eligibility and enrollment services at area high schools, increase outreach and pop-up enrollment activities in rural communities, and improve the consistent monitoring of enrollment and expenditures. The actions described below establish clear timelines, measurable expectations, and management accountability to demonstrate significant improvement and support the Trident Workforce Development Board in meeting its program and expenditure goals.

Ross has evaluated the contributing factors and developed targeted, time-bound strategies to strengthen the program, increase enrollment, and maximize the effective use of available funding.

During PY25, enrollment levels were significantly affected by staffing limitations following funding reductions. The program operated with only three to four full-time Career Coaches shared across the Adult, Dislocated Worker, and Youth programs and no staff member able to fully focus on serving Youth. This structure limited dedicated youth outreach, school coverage, rural recruitment, and consistent participant follow-up.

To strengthen program capacity, **the PY26 youth budget includes a dedicated Youth Program Manager and a Career Coach assigned exclusively to the Youth Program.** These enhancements will provide focused oversight, expand recruitment, strengthen enrollment pipelines, improve follow-up, and better position the program to achieve enrollment and expenditure goals.

Performance and expenditure status. The program met all PY25 WIOA performance measures and achieved the 20% Work Experience (WEX) expenditure requirement stated in our operating contract, however we understand that the goal of BCD-COG is 30%. Ross achieved a 77% Fund Utilization Rate (FUR) by June 30, supported by a 106% increase in

youth spending from April through June 30. **This significant improvement demonstrates the program's strengthened spending capacity and provides a solid foundation and momentum** for achieving a 90% FUR in the upcoming program year. Ross will manage PY26 expenditures against these contractual benchmarks while maintaining at least 30% of local Youth funds for allowable work-based learning activities.

This combined CAP establishes one coordinated approach to improve enrollment, expand access in schools and rural communities, strengthen staff accountability, and align participant services with timely fund utilization. Ross appreciates the Board's continued partnership and remains committed to high-quality services and measurable outcomes for Trident-area youth.

Root-Cause Analysis

Enrollment and Participant Engagement

- Shared staffing across Adult, Dislocated Worker, and Youth programs reduced the time available for youth-specific recruitment and case management.
- Limited dedicated youth staffing constrained outreach, school engagement, rural coverage, and the consistency of participant follow-up.
- The absence of a dedicated Youth Program Manager reduced strategic coordination and day-to-day oversight of youth services.
- Recruitment was often reactive rather than supported by a structured school and rural outreach calendar.
- Inconsistent lead follow-up and pipeline management contributed to lower conversion from initial contact to enrollment.

Fund Utilization

- Enrollment and staffing challenges constrained the participant-service spending pipeline.
- Limited formal forecasting reduced the ability to anticipate obligations and adjust spending strategies early.
- Stronger staff accountability related to enrollment projections, WEX placements, ITA activity, supportive services, and monthly expenditures.

New Year Actions

1. Staffing and Program Oversight

- Hire a Youth Program Manager to oversee youth operations and ensure attainment of enrollment, WEX, performance, and spending goals. **Timeline: Within 30 days.**
- Hire one dedicated Youth Career Coach assigned 100% to youth recruitment, enrollment, case management, and follow-up. **Timeline: Within 30 days.**

2. Daily Service and Staff Productivity

Each designated youth staff member will be scheduled to serve a minimum of two individuals per workday through new enrollments, eligibility determinations, or meaningful program services.

- Continue daily tracking logs documenting the participant name or ID, service provided, and outcome of the interaction.
- Require supervisors to review logs at the end of each work week and report results to Regional Director.
- Generate weekly productivity reports for review by the Project Director and Program Operations Coordinator.
- Staff coaching when standards are missed and initiate a performance improvement plan if deficiencies persist for two consecutive weeks.
- **Timeline: Immediate implementation and ongoing monitoring.**

3. School-Based Eligibility and Enrollment

- Develop a rotating school schedule that ensures a presence at partner high schools within each Career Coach's assigned county.
- Coordinate with school administrators, guidance counselors, and school career staff to establish designated WIOA Enrollment Days.
- Equip field staff with laptops, mobile hotspots, required forms, and mobile printing capability.
- Track students engaged, eligibility determinations completed, and enrollments finalized; conduct monthly check-ins with school partners.
- **Timeline: Complete the school rotation within 30 days of the start of the 2026-2027 school year and visit each assigned school at least twice per month.**

4. Rural Outreach and Enrollment Expansion

- Use program and community data to identify high-impact rural and underserved areas.
- Conduct weekly pop-up recruitment and enrollment events, with a target of at least six events per month.
- Partner with libraries, community centers, faith-based organizations, schools, and local government agencies.
- Publish a monthly outreach calendar and promote events through social media, flyers, partners, and community networks.
- Track attendance, eligibility screenings, applications, completed enrollments, and referral conversion; adjust locations based on results.
- **Timeline: Immediate and ongoing.**

5. Lead Follow-Up, Partnerships, and Participant Pipelines

- Reinforce a 48-hour protocol for responding to leads and referrals. **Timeline: Immediate and ongoing.**

- Establish a youth-led advisory council to strengthen participant engagement and recruitment. **Timeline: Immediate and ongoing.**
- Conduct monthly community-partner engagement to maintain referral pipelines. **Timeline: Immediate and ongoing.**
- Implement industry-specific youth cohorts focused initially on manufacturing and healthcare. **Timeline: Quarter 2.**
- Develop cohort pipelines connecting employers and participants to WEX and Individual Training Account opportunities. **Timeline: Quarter 2.**

6. Fund Utilization and WEX Compliance

- Monitor fund utilization against the contract's cumulative FUR benchmarks: 25% by September 30, 50% by December 31, 75% by March 31, and 90% by June 30.
- Monthly targets for participants referred, worksite agreements executed, participants placed, average hours worked, average wage, and projected monthly payroll.
- Maintain expenditures of at least 30% of local Youth funds on allowable work-based learning activities, including summer and year-round employment, pre-apprenticeship, OJT, internships, and job shadowing.
- Implement a monthly FUR forecasting model integrating enrollment projections, WEX and training pipelines, participant service costs, obligations, and anticipated expenditures. **Timeline: Within 30 days.**
- Review budget performance weekly, monthly, and quarterly and initiate corrective adjustments when projected spending falls below a contractual benchmark.

Geographic Coverage and Field Assignments

Ross staff will maintain clear school and rural-community assignments to support consistent field coverage. The combined plan identifies the following initial service areas:

Berkeley County

- Schools: Berkeley Alternative, Berkeley High, Cane Bay High, Cross High, Goose Creek High, Hanahan High, Philip Simmons High, Stratford High, and Timberland High.
- Rural communities: St. Stephen, Pineville, Russellville, Cross, Bonneau, Huger, and Cordesville.

Charleston County

- Schools: Academic Magnet, Baptist Hill High, James Island High, Lucy Beckham High, Military Magnet, North Charleston High, Stall High, Septima Clark, St. Johns High, Wando High, and West Ashley High.
- Rural communities: Ravenel, Hollywood, Meggett, McClellanville, Awendaw, Wadmalaw, Johns Island, and Edisto Island.

Dorchester County

- Schools: Ashley Ridge High, Fort Dorchester High, Summerville High, Rise Academy, and Woodland High.

- Rural communities: St. George, Ridgeville, Reevesville, Harleyville, Grover, Dorchester, and Knightsville.

Monitoring and Accountability

- Weekly recruitment, participant-service, and spending logs.
- Individual staff scorecards covering productivity, enrollment, documentation, and follow-up.
- Monthly enrollment, WEX, and FUR reports comparing actual results with projections and contractual benchmarks.
- Quarterly performance reviews and documented corrective actions when targets are not met.
- Monthly school-partner check-ins and review of rural event conversion metrics.

Staff Support and Progressive Accountability

We will provide training, field mentoring, and operational support to strengthen outreach, enrollment, participant engagement, documentation, and case management. When performance expectations are not met, Ross will use progressive accountability consistent with company policy:

- Verbal warning for the first occurrence.
- Written warning and coaching plan for the second occurrence.
- Performance Improvement Plan for continued noncompliance.
- Further disciplinary action when necessary.

Commitment

Ross remains fully committed to delivering a high-quality Youth Program that serves the community effectively. The staffing and operational enhancements outlined in this plan build on recent momentum and establish clear expectations for enrollment, service delivery, WEX investment, fiscal stewardship, and accountability.

We appreciate the continued partnership and support of the Trident Workforce Development Board and look forward to achieving strong outcomes for the youth we serve.

Thank you,

A handwritten signature in black ink, appearing to read "Anna E. Cumberledge".

Anna Cumberledge

Regional Director

Ross Innovative Employment Solutions



Revised Recommendation-Staffing Restructure

Ross appreciates the Board's continued partnership as we work together to sustain momentum and strengthen youth operations and service delivery going forward.

As previously shared, Ross developed an action plan that included the addition of a dedicated Youth Manager while maintaining the existing Director structure. Since submitting that plan, we have taken further time to assess program needs, review additional feedback, evaluate responsibilities, and consider the structure that will ensure the right person is in the right position.

Based on that further analysis, we believe that a modest adjustment to the staffing structure will provide the best solution.

Rather than moving forward with the proposed **Youth Manager** position, Ross recommends establishing two positions: a Program Manager (to be hired) and a Community Coordinator (current Director).

The **Program Manager** position would have primary responsibility for staff supervision, performance accountability, and program administration and would be focused on:

- Managing, coaching, and holding staff accountable for expectations and performance;
- Monitoring individual and program-level outcomes;
- Ensuring consistent implementation of policies, procedures, and program requirements;
- Managing day-to-day program operations and administrative responsibilities; and
- Providing consistency, follow-through, and accountability across the team.

At the same time, we recommend transitioning the current Director into a **Community Coordinator** role. Through the evaluation of feedback and assessment, we believe this structure would allow us to better align responsibilities with the Director's demonstrated strengths while addressing the program's administrative needs.

The Community Coordinator would have a strong focus on youth engagement and community presence and would serve as a visible representative of the program

throughout the region. Responsibilities would include developing and maintaining relationships with community organizations, schools, employers, referral partners, and other stakeholders; representing the program at community events; supporting outreach and recruitment activities; and helping maintain a strong and consistent pipeline of participants into the program.

We believe this role better leverages the Director's strengths in relationship building, community engagement, outreach, and representing the program externally, while placing responsibility for staff management and operational accountability with a Program Manager.

This approach represents a positive solution for the program by strengthening the program while allowing the opportunity to retain and leverage the valuable strengths, experience, support and relationships of the existing Director.

We appreciate the Board's continued partnership and remain committed to working together to support the program's success.

From Momentum to Measurable Results: Ross Positioning WIOA Youth for a Strong PY26

Momentum at a Glance:

- ✓ **NEW Cohort pipeline is in demand—200+ HVAC referrals** for training
- ✓ **NEW Tradewinds Work Experience Cohort graduated 13 participants-more to come!**
- ✓ **Training Spending**-In the first 2 months, we are on track to meet/exceed the **first-quarter Youth ITA expenditure goal of \$40,000**, with \$15,435 in training vouchers already issued and more in the pipeline
- ✓ **\$32,500+ in WEX investment**
- ✓ **5–10 anticipated Fetter placements**
- ✓ **NEW** expanded staff capacity

Investing in Capacity — Dedicated Leadership and Front-Line Support

NEW Program Staffing — Building the Capacity to Deliver Results!

- **NEW 100% Dedicated Youth Manager:** New this year, the program will benefit from a manager fully dedicated to WIOA Youth. This added capacity will strengthen youth program oversight, performance management, staff accountability, participant engagement, partnership development, and expenditure monitoring.
- **NEW Dedicated Youth Career Coach:** A new Youth Career Coach will focus specifically on **outreach, recruitment, enrollment, engagement, and connecting youth to program activities** throughout the tri-county region. This position will help strengthen the participant pipeline while ensuring enrolled youth remain actively engaged and progress toward education, training and employment outcomes.

Together, these positions create the infrastructure needed to **increase enrollment, accelerate participant activity, expand service delivery, meet performance goals, and maximize the investment of available Youth funding.**

Expanding Work Experience — Turning Partnerships into Careers!

NEW WEX Partnerships — Growing Employer Engagement and Work-Based Learning

NEW opportunities: The program continues to expand its pipeline of employers and community partners.

Recent Accomplishments:

- **NEW Newport News/Tradewinds Partnership:** Following the successful completion of the inaugural Newport News/Tradewinds WEX cohort, **13 participants successfully completed the experience.** Building on that momentum, staff are preparing to launch a **second cohort**, expanding access to structured work-based learning and work-readiness development.
- **NEW Fetter Health Care:** Fetter Health Care has joined the program's growing network of WEX partners, creating opportunities for up to **10 participants** to gain hands-on experience while exploring career pathways within the healthcare industry.
- **South Carolina Department of Motor Vehicles:** A recently formalized strategic partnership with SCDMV is expanding work-based learning opportunities throughout the tri-county region. With internship opportunities available at multiple locations, staff are quickly identifying and preparing participants for placements that will strengthen workplace skills, career readiness, and pathways to future employment.
- **NEW Cullum:** The partnership with Cullum is already translating opportunity into action. Two participants have been placed in meaningful work experience assignments with more to come, creating early momentum while allowing youth to develop practical workplace and occupational skills.
- **Dr. Ferguson/SC DEW Partnership:** A new collaborative initiative with Dr. Ferguson and SC DEW is being developed to serve approximately **15–20 Out-of-School Youth** through a dedicated cohort. Outreach, enrollment, and program preparation activities are underway, with implementation targeted to begin in **October 2026**. The initiative will expand access to career exploration, work readiness, paid work experience, and potential employment opportunities.
- **SC Works Charleston and Dorchester:** Strategic WEX placements within SC Works have created a **dual benefit:** expanding operational capacity within the Charleston and Dorchester offices while giving Youth participants direct exposure to the workforce development system. Participants are building valuable **customer service, administrative, communication, and workplace-readiness skills** while working alongside WIOA and Operator staff.
- **Upcoming-BCDCOG Facilities Maintenance:** A new partnership with BCDCOG is opening an additional career pathway in **Facilities Maintenance**, further

diversifying WEX opportunities available to participants. Staff are reviewing current caseloads and identifying candidates whose interests and career goals align with these placements.

Building the Youth Pipeline — Outreach that Leads to Enrollment and Engagement

PY26 Recruitment and Community Engagement — Meeting Youth Where They Are

The program has been **strategically strengthening its presence** throughout the tri-county region through intentional partnerships, community events, targeted outreach, and recurring enrollment opportunities.

- **NEW HVAC and Skilled Trades Pipeline:** This new cohort opportunity has brought more **than 200 referrals from youth interested in HVAC training and employment opportunities**. Things are moving quickly! Staff are actively coordinating orientations, eligibility determinations, and enrollment activities to convert this significant level of interest into program participation and entry into a high-demand career pathway.
- **Berkeley County Adult Education:** Recruitment efforts have expanded through a strong partnership with Berkeley County Adult Education. Multiple orientations have been conducted throughout the county, and **weekly enrollment opportunities** are helping create a consistent pipeline for participant recruitment and engagement.
- **Dorchester County Adult Education:** Staff expanded community visibility through participation in the Dorchester County Adult Education community event in St. George on July 27, connecting directly with prospective participants and increasing awareness of education, training, employment, and supportive service opportunities available through WIOA Youth.
- **McKinney-Vento Outreach:** Participation in the August 8 McKinney-Vento event provided an important opportunity to connect with youth and families experiencing housing instability. Staff increased awareness of available WIOA Youth services and pathways to education, training, paid work experience, and employment.
- **SCDOT School-to-Work Opportunities:** The program is partnering with SCDOT to connect students with meaningful **School-to-Work opportunities**. Outreach and participant engagement efforts are underway to identify interested youth and move them toward work-based learning experiences and increased career readiness.

Investing in Participants — Turning Funding into Opportunity

PY26 Expenditures — Accelerating Investment in Training, Supportive Services, and Paid Work Experience

The program is focused not simply on spending available resources, but on **strategically investing those resources in activities that advance participants toward credentials, skills, work experience, and employment.**

- **Individual Training Accounts:** On track to meet/exceed the **first-quarter Youth ITA expenditure goal of \$40,000**, with **\$15,435 in training vouchers already issued and pending payment (others in the pipeline)**. These investments are connecting participants to occupational training and industry-recognized career pathways.
- **Supportive Services:** Additional **funds have been prioritized and invested in supportive services**, helping remove barriers that could otherwise prevent participants from successfully engaging in training, work experience, and employment activities.
- **Paid Work Experience:** WEX investment continues to accelerate in PY26, with **more than \$32,500 invested during the first couple of months in paid work experience opportunities**. These investments provide participants with income while developing practical skills, workplace behaviors, employer connections, and career readiness.

Positioned for a Strong PY26

The Youth Program has entered PY26 with **greater dedicated staffing capacity, an expanding employer network, a significant recruitment pipeline, growing WEX opportunities, and increased investment directly into participant services.**

The addition of a **dedicated Youth Manager and Youth Career Coach** will allow the program to build upon this foundation with greater focus and accountability. Priorities for PY26 include:

- Converting increased outreach and referrals into eligible enrollments;
- Moving participants quickly from enrollment into meaningful program activities;
- Continue expanding WEX opportunities and employer partnerships across the tri-county region;
- Increasing utilization of ITAs, supportive services, and other participant-focused funding;

- Strengthening the connection between training, work experience, credential attainment, and employment;
- Meet/exceed program goals and expectations.

From Capacity to Impact

PY26 is about converting opportunity into measurable results. With dedicated Youth leadership, focused recruitment and engagement staff, a growing network of employers and community partners, and an expanding pipeline of participants and work-based learning opportunities, the program is positioned to:

- ✓ serve more youth,
- ✓ invest more resources directly into their success,
- ✓ and produce stronger education, training, employment, and career outcomes throughout the tri-county region.

MEMORANDUM

Date: September 14, 2026
To: Trident Workforce Development Board (TWDB)
From: Katie Paschall, Finance Manager
Subject: July 31, 2026 Financial Report Overview

Please find attached the July 31, 2026 WIOA Financial Report. Below is a brief overview of the activities for FY27.

Revenues

- The **Federal Allocation** and **Carry-In** revenue are the revenue recognized due to the expenditures for this fiscal year. This allocation is received from SC Department of Employment and Workforce (SCDEW) and budgeted based on the allocation received.
- **High-Performance Incentive Award** is discretionary funds to be used for Sector Strategy Partnerships.
- **Security Funds** is discretionary funds to support physical security in SC Works Centers.
- **Shared Costs (Rent Income)** is the funds received from partners in the SC Works Trident facilities through the MOU agreements.

Expenditures

Administration Cost

- **Personnel Costs, Benefits, and Indirect** are the BCDCOG staff salaries, benefits, and indirect.

Operating Cost

- **Personnel Costs, Benefits, and Indirect** are the BCDCOG staff salaries, benefits, and indirect.
- **Advertising** is youth program promotional billboard and radio advertisements.
- **Contract Services** includes the cost of security at SC Works Charleston.
- **Equipment Rental** is the cost to lease the SC Works Xerox copier machines.
- **Agency Insurance** is the cost to insure WIOA property at the SC Works facilities.
- **Travel** is staff travel for training.
- **Office Equipment Maintenance** is the cost associated with maintaining WIOA equipment. This includes the print charges of all SC Works facilities copiers, IT technician costs, and other IT costs relating the servers and equipment at each facility.
- **Rent** is the cost to lease the SC Works Charleston facility.
- **Communications** includes internet and telephone communications at the SC Works facilities.
- **Training** is registration fees for staff training events.
- **Miscellaneous** is the cost of the Mobile Career van gps tracking.

MEMORANDUM

Program Cost

- **Eckerd Contract Services** is program costs associated with being the One Stop Operator and the management of each SC Works facility.
- **Ross IES Contract Services** is the cost of services provided by Ross Innovative Employment Solutions Corp. This includes program services and training costs for the Adult, Dislocated Worker, and Youth programs.
- **Training and Education-OJT** is the On-the-Job-Training for participants of the WIOA program.

Fiscal year to date, workforce expenditures total \$220,822 as of July 31, 2026. If you have any questions, please contact me at 843-529-2588 or katiep@bcdco.org.

**BERKELEY CHARLESTON DORCHESTER COUNCIL OF GOVERNMENTS
WORKFORCE INNOVATION AND OPPORTUNITY ACT
BUDGET TO ACTUAL
FOR THE PERIOD ENDED JULY 31, 2026**

**%
COMPLETE
8%**

	BUDGET FY 26/27 PY 25/26	FY27 ACTUAL	BALANCE	% of BUDGET
REVENUE				
FEDERAL ALLOCATION	2,230,365	-	2,230,365	0%
CARRY-IN	765,623	181,271	584,352	24%
HIGH-PERFORMANCE INCENTIVE	60,000	-	60,000	0%
SECURITY FUNDS	38,479	5,822	32,657	15%
SHARED COSTS (RENT INCOME)	230,064	33,729	196,335	15%
TOTAL REVENUE	3,324,531	220,822	3,103,709	7%
ADMINISTRATION COST				
PERSONNEL COSTS	158,840	10,730	148,110	7%
BENEFITS	97,734	8,062	89,672	8%
INDIRECT	106,068	11,236	94,832	11%
AUTOMOTIVE	50	-	50	0%
DUES & MEMBERSHIPS	1,790	-	1,790	0%
TRAVEL	200	-	200	0%
TRAINING & EDUCATION	500	-	500	0%
MISCELLANEOUS	200	-	200	0%
TOTAL ADMINISTRATION	365,382	30,028	335,354	8%
PERSONNEL COSTS	135,149	11,049	124,100	8%
BENEFITS	83,157	8,303	74,854	10%
INDIRECT	90,250	11,570	78,680	13%
ADVERTISING	-	3,572	(3,572)	N/A
AUTOMOTIVE	500	-	500	0%
CONTRACT SERVICES	181,805	5,299	176,506	3%
DUES & MEMBERSHIPS	270	-	270	0%
EQUIPMENT RENTAL	16,545	1,171	15,374	7%
AGENCY INSURANCE	1,830	807	1,023	44%
REPAIRS & MAINTENANCE	250	-	250	0%
TRAVEL	5,500	1,199	4,301	22%
OFFICE EQUIPMENT MAINT	132,880	18,985	113,895	14%
SUPPLIES	3,000	-	3,000	0%
PRINTING	3,500	-	3,500	0%
RENT	380,928	31,745	349,183	8%
COMMUNICATIONS	45,070	3,685	41,385	8%
TRAINING & EDUCATION	2,790	1,100	1,690	39%
FURNITURE & EQUIPMENT	49,500	-	49,500	0%
MISCELLANEOUS	3,950	21	3,929	1%
TOTAL OPERATING COST	1,136,874	98,506	1,038,368	9%
CONTRACT SERVICES				
Eckerd Connects - One Stop Operator	332,275	23,746	308,529	7%
Ross IES - Adult/DW Program	700,000	19,611	680,389	3%
Ross IES - Youth Program	640,000	47,445	592,555	7%
TRAINING & EDUCATION- IWT	50,000	-	50,000	0%
TRAINING & EDUCATION- OJT	100,000	1,486	98,514	1%
TOTAL PROGRAM COST	1,822,275	92,288	1,729,987	5%
TOTAL EXPENDITURES	3,324,531	220,822	3,103,709	7%
	-	-		
Carry-In FY 27/28	288,810	9%		

BERKELEY-CHARLESTON-DORCHESTER COUNCIL OF GOVERNMENTS
WORKFORCE INNOVATION AND OPPORTUNITY ACT
CONTRACT PERIOD: 7/1/2026 - 06/30/2027
FOR THE PERIOD ENDED JULY 31, 2026

	ALL FUNDS						
BUDGET	Adult	Dislocated Worker	Youth	Admin	High-Perf. Board Incentive	Security Funds	Total
PROGRAM	927,747	890,912	811,947	-	60,000	38,479	2,729,085
FUNDS TRANSFERRED PY25 FUNDS	184,754	(184,754)	-	-	-	-	-
FUNDS TRANSFERRED PY26 FUNDS	750,000	(750,000)	-	-	-	-	-
ADMIN	115,278	130,149	119,955	365,382	-	-	365,382
SHARED COSTS (RENT INCOME)	218,561	11,503	-	-	-	-	230,064
TOTAL BUDGET	2,196,340	97,810	931,902	365,382	60,000	38,479	3,324,531
ADMINISTRATION COST							
PERSONNEL COSTS	-	-	-	10,730	-	-	10,730
BENEFITS	-	-	-	8,062	-	-	8,062
INDIRECT	-	-	-	11,236	-	-	11,236
AUTOMOTIVE	-	-	-	-	-	-	-
CONTRACTED SERVICES	-	-	-	-	-	-	-
DUES & MEMBERSHIPS	-	-	-	-	-	-	-
TRAVEL	-	-	-	-	-	-	-
TRAINING & EDUCATION	-	-	-	-	-	-	-
MISCELLANEOUS	-	-	-	-	-	-	-
TOTAL ADMINISTRATION	-	-	-	30,028	-	-	30,028
OPERATING COST							
PERSONNEL COSTS	10,279	770	-	-	-	-	11,049
BENEFITS	7,724	579	-	-	-	-	8,303
INDIRECT	10,764	806	-	-	-	-	11,570
ADVERTISING	-	-	3,572	-	-	-	3,572
AUTOMOTIVE	-	-	-	-	-	-	-
CONTRACT SERVICES	-	-	-	-	-	5,299	5,299
DUES & MEMBERSHIPS	-	-	-	-	-	-	-
EQUIPMENT RENTAL	1,112	59	-	-	-	-	1,171
AGENCY INSURANCE	671	40	96	-	-	-	807
REPAIRS & MAINTENANCE	-	-	-	-	-	-	-
TRAVEL	1,139	60	-	-	-	-	1,199
OFFICE EQUIPMENT MAINT	9,315	493	8,654	-	-	523	18,985
SUPPLIES	-	-	-	-	-	-	-
PRINTING	-	-	-	-	-	-	-
RENT	17,494	921	13,330	-	-	-	31,745
COMMUNICATIONS	3,476	184	25	-	-	-	3,685
TRAINING	1,045	55	-	-	-	-	1,100
FURNITURE & EQUIPMENT	-	-	-	-	-	-	-
MISCELLANEOUS	15	1	5	-	-	-	21
TOTAL OPERATING COST	63,034	3,968	25,682	-	-	5,822	98,506
PROGRAM COST							
CONTRACT SERVICES							
Eckerd Connects - One Stop Operator	22,559	1,187	-	-	-	-	23,746
Ross IES - Adult/DW Program	16,819	2,792	-	-	-	-	19,611
Ross IES - Youth Program	-	-	47,445	-	-	-	47,445
TRAINING & EDUCATION- IWT	-	-	-	-	-	-	-
TRAINING & EDUCATION- OJT	1,486	-	-	-	-	-	1,486
SUPPORTIVE SERVICES	-	-	-	-	-	-	-
TOTAL PROGRAM COST	40,864	3,979	47,445	-	-	-	92,288
TOTAL PROJECT COSTS	103,898	7,947	73,127	30,028	-	5,822	220,822

SC Works Trident
Monthly Centers Report
Program Year 25 (July 1, 2025 to June 30, 2026)

*Disclaimer: The service numbers reported for SC Works Centers reflect a combination of staff-assisted and self-assisted services provided at each location. Staff-assisted services include, but are not limited to, workshops, career guidance and planning, counseling, and federal bonding assistance. Self-assisted services refer to individuals accessing SC Works Online independently—whether onsite or remotely—to complete tasks such as creating or updating resumes or conducting job searches. If a job search is conducted from a home computer, each job searched is counted as a 'Job Seeker Service.

Report Date:	9/15/26 9:44 AM	Jul-26	Aug-26	Sep-26	Oct-26	Nov-26	Dec-26	Jan-27	Feb-27	Mar-27	Apr-27	May-27	Jun-27	TOTAL
SC Works Berkeley														
Center Utility														
Total Client Visits		113	107											220
Unemployment Assistance		36	32											68
Job Seeker Services														
New SCWOS Registrations		169	153											322
New Résumés in SCWOS		263	262											525
Career Readiness Workshops		0	0											0
Career Readiness Workshop Attendees		0	0											0
Business Services														
New SCWOS Registrations		1	4											5
New Job Orders		12	13											25
New Job Referrals		775	783											1,558
Career Fairs or Hiring Events		2	1											3
Career Fair or Hiring Event Attendees		61	78											139
SC Works Charleston														
Center Utility														
Total Client Visits		2,156	1,974											4,130
Unemployment Assistance		510	339											849
Job Seeker Services														
New SCWOS Registrations		314	299											613
New Résumés in SCWOS		625	574											1,199
Career Readiness Workshops		3	7											10
Career Readiness Workshop Attendees		27	17											44
Business Services														
New SCWOS Registrations		18	4											22
New Job Orders		118	105											223
New Job Referrals		1,558	1,743											3,301
Career Fairs or Hiring Events		12	11											23
Career Fair or Hiring Event Attendees		298	560											858
SC Works Dorchester														
Center Utility														
Total Client Visits		263	200											463
Unemployment Assistance		100	73											173
Job Seeker Services														
New SCWOS Registrations		109	114											223
New Résumés in SCWOS		193	165											358
Career Readiness Workshops		0	0											0
Career Readiness Workshop Attendees		0	0											0
Business Services														
New SCWOS Registrations		3	1											4
New Job Orders		23	38											61
New Job Referrals		492	514											1,006
Career Fairs or Hiring Events		0	3											3
Career Fair or Hiring Event Attendees		0	103											103

SC Works Trident
Monthly Centers Report
Program Year 25 (July 1, 2025 to June 30, 2026)

Unemployment Update:

According to the most recent labor market information released for June 2026, the Trident Region reported an unemployment rate of 4.4%, with 458,707 residents employed out of a labor force of 476,125. Regional wages remained strong, with average earnings of \$35.75 per hour and \$74,360 annually. These indicators reflect continued economic stability and workforce demand across Berkeley, Charleston, and Dorchester counties.

Berkeley Update:

In the reporting period, SC Works Berkeley staff served 107 customers onsite at the center. Business Services staff facilitated 783 new job referrals through the SC Works Online Services (SCWOS) system. Additionally, 153 new job seekers registered for work in Berkeley County. Overall, the SC Works Berkeley team delivered 49,255 employment-related services to customers through a combination of telephone, in-person, and online support.

Charleston Update: During the August reporting period, staff served 1,974 customers onsite, created 105 new job orders in the SC Works Online Services (SCWOS) system, and assisted 299 new job seekers with workforce registration in Charleston County. Collectively, the team delivered 139,963 employment-related services through in-person, telephone, and virtual interactions. The Business Services Team made a significant impact by hosting 15 workforce and employer engagement events, serving 721 customers over 21 business days. The team demonstrated exceptional coordination and outreach efforts, including successfully hosting two events in a single day, to expand access to employment opportunities, connect employers with qualified talent, and support workforce development initiatives throughout the region. These accomplishments reflect the dedication, collaboration, and customer-focused approach of the team, whose efforts continue to create meaningful opportunities for job seekers and employers while advancing the mission of workforce development.

Dorchester Center Update: SC Works Dorchester staff served 200 customers in the center during the reporting period. Business Services staff facilitated 514 new job referrals through the SC Works Online Services (SCWOS) system. Additionally, 114 new job seekers registered for work in Dorchester County. In total, the center delivered 39,869 employment-related services through a combination of in-person, telephone, and online support.

WIOA PERFORMANCE DASHBOARD (Ross IES Performance)

PROGRAM YEAR 26 (July 1, 2026 to June 30, 2027)

SC WORKS BRINGING EMPLOYERS AND JOB SEEKERS TOGETHER			1st Quarter		PY26 Total
Report Date: 9/15/26 9:45 AM			July	Aug	Total
WIOA PROGRAM					
Attended WIOA Informational Sessions (Adult)			111	80	191
SC Works Berkeley			10	8	18
SC Works Charleston			81	58	139
SC Works Dorchester			20	14	34
Attended WIOA Informational Sessions (DW)			0	1	1
SC Works Berkeley			0	0	0
SC Works Charleston			0	1	1
SC Works Dorchester			0	0	0
Attended WIOA Informational Sessions (Youth)			7	7	14
SC Works Berkeley			3	5	8
SC Works Charleston			4	2	6
SC Works Dorchester			0	0	0
Met Eligibility Requirements (Adult)			16	23	39
SC Works Berkeley			3	3	6
SC Works Charleston			11	15	26
SC Works Dorchester			2	5	7
Met Eligibility Requirements (DW)			0	1	1
SC Works Berkeley			0	0	0
SC Works Charleston			0	1	1
SC Works Dorchester			0	0	0
Met Eligibility Requirements (Youth)			4	4	8
SC Works Berkeley			1	3	4
SC Works Charleston			4	1	5
SC Works Dorchester			0	0	0
Enrolled in WIOA Program (Adult-new)			14	20	34
SC Works Berkeley			2	2	4
SC Works Charleston			9	14	23
SC Works Dorchester			3	4	7
Enrolled in WIOA Program (DW-new)			0	1	1
SC Works Berkeley			0	0	0
SC Works Charleston			0	1	1
SC Works Dorchester			0	0	0
Enrolled in WIOA Program (Youth-new)			7	5	12
SC Works Berkeley			0	4	4
SC Works Charleston			6	0	6
SC Works Dorchester			1	1	2
Total Served in WIOA Program (Adult): Carry-In= 117 New= 34 (*carry-in subject to change)					151
Total Served in WIOA Program (DW): Carry-In= 10 New= 1 (*carry-in subject to change)					11
Total Served in WIOA Program (Youth) Carry-In= 52 New =12 (*carry-in subject to change)					64

WIOA PERFORMANCE DASHBOARD (Ross IES Performance)

PROGRAM YEAR 26 (July 1, 2026 to June 30, 2027)

SC WORKS BRINGING EMPLOYERS AND JOB SEEKERS TOGETHER TRIDENT			1st Quarter		PY26 Total
Report Date:	9/15/26 9:45 AM		July	Aug	Total
TRAINING					
Entered Training (during the month)			2	7	9
Diversified Manufacturing			0	0	0
Transportation/Logistics			0	2	2
Healthcare			0	4	4
IT Services			1	1	2
Trade/Construction			1	0	1
Hospitality/Tourism			0	0	0
Total received Training (Adults) PY26					51
Total received Training (DWs) PY26					6
Total received Training (Youth) PY26					20
Credential Earned (Adult & DW)			3	0	3
Diversified Manufacturing			0	0	0
Transportation/Logistics			1	0	1
Healthcare			2	0	2
IT Services			0	0	0
Trade/Construction			0	0	0
Hospitality/Tourism			0	0	0
GED			0	0	0
Credential Earned (Youth)			2	2	4
Diversified Manufacturing			0	0	0
Transportation/Logistics			0	1	1
Healthcare			0	0	0
IT Services			1	0	1
Trade/Construction			1	1	2
Hospitality/Tourism			0	0	0
GED			0	0	0
Employment					
Entered Employment (WIOA)					2
Entered Employment with an OJT					0
Youth Employment 2nd QTR					0
Youth Employment 4th QTR					0

On-The-Job Trainings PY26

	FIRST NAME	LAST NAME	EMPLOYER	START DATE	END DATE	JOB STATUS	Exit Reason
1	James	Kowalski	Ervfk	7/6/2026	9/28/2026	Hpsor hg	
2	Shimmikka	Brave	VFGPY	7/17/2026	10/9/2026	Hpsor hg	
3	Sdx	Shudjlq	Ervfk	; 24 : 2535	442<2535	Hpsor hg	
4							
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33							
34							

FILTERS

County

All

Employer

All

Industry

All

Job Title

All

QUICK FACTS

3

Fully Executed Contracts

3

Individuals Trained

2

Employers

11.6 Weeks

Avg. Training Length (Contract Duration)

\$25.24 / hr

Avg. Starting Wage

OJT PROGRAM DASHBOARD

Fully Executed OJT Contracts

Program Year

2026 (PY26)

Total Budget

\$100,000.00

100% of \$100,000 Budget

Total Contract Value

\$14,782.50

14.8% of \$100,000 Budget

Total OJT Reimbursement

\$0.00

0% of \$100,000 Budget

Total Wages Committed

\$22,671.88

Avg. Wage \$25.24 / hr

Employers

2

Across 2 Sectors

Individuals Trained

3

From 3 Contracts

Remaining Budget

\$85,217.50

85.2% Remaining of \$100,000

Contracts by Industry

3

Contracts

Manufacturing
2 (66.7%)

Government
1 (33.3%)

Contracts by County

of Contracts

2

Dorchester

1

Charleston

County

Contracts by Status

3

Contracts

Fully Executed
3 (100%)

Contract Value Over Time

Contract Value

\$3.42K

\$6.60K

\$4.76K

Jul 2026

Aug 2026

Sep 2026

Month (Start Date)

Contracts by Employer

Employer

2 (66.7%)

Bosch

1 (33.3%)

SCDMV

of Contracts

Contracts by Starting Wage Range

\$30.00 or above

1 (33.3%)

\$20.00 – \$29.99

1 (33.3%)

\$10.00 – \$19.99

1 (33.3%)

of Contracts

Fully Executed OJT Contracts

OJT Number	First Name	Last Name	Last 4 SSN	Employer	Industry	County	Job Title	Start Date	End Date	Starting Wage	Training Length (Weeks)	Contract Value	OJT Reimbursement
PY26-01	James	Kowalski	6934	Bosch	Manufacturing	Dorchester	Apprentice	7/6/2026	9/28/2026	\$24.90	12.4	\$3,733.80	\$0.00
PY26-02	Shimmikka	Brave	4863	SCDMV	Government	Charleston	Admin Specialist	7/17/2026	10/9/2026	\$17.81	12.3	\$2,773.59	\$0.00
PY26-03	Paul	Peragine	6907	Bosch	Manufacturing	Dorchester	Spec Tech	8/17/2026	11/9/2026	\$33.00	12.4	\$8,275.11	\$0.00
TOTAL				3 Contracts						\$25.24	11.6	\$14,782.50	\$0.00

TWDB PERFORMANCE REVIEW COMMITTEE

ELIGIBLE TRAINING PROVIDER SCORECARD - Adult & Dislocated Workers

Provider	Program	Carryover from PY2025	Entered training in PY2026	Total # entered 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
MedCerts	HI-5000 Medical Coding and Billing Professional	8		8	3	1	4	5	4						\$4,000.00	\$32,000.00	41%
	RX 3000 Pharmacy Technician Professional	1	1	2	2										\$4,000.00	\$8,000.00	
	DA-3000 Dental Assistant	1	1	2	1		1	1	1						\$4,000.00	\$4,000.00	41%
	SP-3000 Sterile Processing Technician	8		8	4		4	4	4	1	1	25%	1	\$17.56	\$4,000.00	\$32,000.00	56%
	IT-5000 IT Security & Network Technician	1		1			1	1	1						\$4,000.00	\$4,000.00	41%
	HI-9600 Clinical Medical Specialist	3		3	3										\$5,000.00	\$15,000.00	
	IT-2100 PC Technician	1		1			1	1							\$3,100.00	\$3,100.00	41%
	IT-2000: IT Helpdesk Administrator	5		5	3		2	2	2						\$4,000.00	\$20,000.00	41%
	HI-6600 Medical Lab Assistant	1		1	1										\$4,000.00	\$4,000.00	
	HI-7000 Patient Care Technician	3	1	4	2	1	1	2	1						\$4,000.00	\$16,000.00	36%
Each1Teach1 Tech, Inc.	Security Operations Center Level I-STBS		1	1	1										\$7,050.00	\$7,050.00	
Lowcounty Medical Training Center	Clinical Medical Assistant	5		5	3		2	2	2						\$4,617.00	\$23,085.00	41%
Carolina Construction LLC	Heavy Equipment Operator Training without NCCER Core Curriculum		1	1			1	1	1	1		100%	1	\$25.00	\$5,950.00	\$5,950.00	96%
Integrity Healthcare Training	Certified Nursing Aide Training	8	3	11	4		7	7	7	2	2	29%	2	\$18.50	\$1,435.00	\$15,785.00	70%
COMNet Group, Inc.	Security+ IT HelpDesk Tech	1		1			1	1	1						\$4,880.00	\$4,880.00	41%
COMNet Group, Inc.	Project Coordinators (capm) Or Office Administration (excel Sharepoint)		1	1	1										\$4,475.00	\$4,475.00	
COMNet Group, Inc.	Web Design and Development	1		1			1	1	1						\$4,935.00	\$4,935.00	41%
COMNet Group, Inc.	A+ Certification	1		1			1	1	1						\$4,630.00	\$4,630.00	41%
Air Conditioning and Refrigeration Training Center	Basic Training for HVAC Technicians-Residential/Light Commercial AC & Heat Pump Service Certification Program	3		3	2		1	1	1						\$7,500.00	\$22,500.00	35%
Lindenwood Education System dba Miller-Motte Driving Institute	CDL Training: Class A Tractor Trailer	14	2	16	4	1	11	12	9	5	5	45%	5	\$23.33	\$5,000.00	\$80,000.00	71%
PSI Project Management, Inc.	Project Management Training Program for PMP/CAPM Exam Prep and Project Managers	4		4			4	4	4						\$2,539.00	\$10,156.00	45%
DEW HVAC Training Services Center, LLC	HVAC Certification	9	3	12	9		3	3	3	1	1	33%	1	\$25.00	\$9,500.00	\$114,000.00	65%
Transtech, Inc.	Commercial Driver Training Program	1		1	1										\$4,154.00	\$4,154.00	
Second Chance Job Center	Plumbing	1		1	1										\$5,700.00	\$5,700.00	
PSI Project Management, Inc.	Project Management Training Program for PMP/CAPM Exam Prep and Project Managers	4		4			4	4	4						\$3,639.00	\$14,556.00	41%
Valley Coach and Logistics Driving Training School	Class B CDL Training	1		1	1										\$4,000.00	\$4,000.00	
Rock Gate Capital LLC DBA 160 Driving Academy	Class A Commercial Driver's License (CDL) License Training	4		4			4	4	4	1	1	25%	1	\$20.00	\$4,670.00	\$18,680.00	56%
Totals																	

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 75%
	Exceeds (100%)
	At Benchmark (75%)
	Enrolled
	Incomplete

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



PY26 Overview

WIOA Program- Orientation

(Numbers as of 9/10/26)

- ▶ **Berkeley**
 - ▶ Adults/DW: 19
 - ▶ Youth: 8
- ▶ **Charleston**
 - ▶ Adults/DW: 150
 - ▶ Youth: 6
- ▶ **Dorchester**
 - ▶ Adults/DW: 37
 - ▶ Youth: 3

WIOA Program- Enrollments (Numbers as of 9/10/26)

- ▶ **Berkeley**

- ▶ Adults: 4
- ▶ DW: 0
- ▶ Youth: 4

- ▶ **Charleston**

- ▶ Adults: 25
- ▶ DW: 1
- ▶ Youth: 6

- ▶ **Dorchester**

- ▶ Adults: 8
- ▶ DW: 0
- ▶ Youth: 3

- **Overall**

- Adults: 37
- DW: 1
- Youth: 13

WIOA Program- Total Served (Numbers as of 9/10/26)

- ▶ Adults: 146 (109 carry in)
- ▶ DW: 10 (9 carry in)
- ▶ Youth: 64 (51 carry in)

***Carry-In numbers subject to change**

Training as of 9/10/26

- ▶ **Received Training in PY26**
 - ▶ **Adults -43**
 - ▶ **Dislocated Workers - 5**
 - ▶ **Youth- 21**
- ▶ **17- Credentials Earned**
- ▶ **27 MSG's for 27 Participants**

Work Based Learning as of 9/10/26

- ▶ PY26 WEX: 30 (4 active)
- ▶ Opportunities available:
 - ▶ Fetter Health Care
 - ▶ BCDCOG
 - ▶ SCDMV
 - ▶ A Day's Work
 - ▶ Bridgeview

Outreach

- ▶ **Workforce Development Month**
 - ▶ Berkeley County
 - ▶ Charleston County
 - ▶ Dorchester County
 - ▶ Public Service
- ▶ **I-526 projects (School to Work and Careers in Transportation)**
- ▶ **A Day's Work Program**
- ▶ **Solicitor's Office in Dorchester County**
- ▶ **Bridgeview**

Questions?





MARKETING & COMMUNICATIONS UPDATES

SEPT. 22, 2026

RECENT ENGAGEMENT

*All public-facing events are posted
on **social media** and to
scworkstrident.org.*

Month	Unique Social Media Link Clicks	Social Media Net Growth	Unique Flyer QR Code Scans
June	831	85	2,003
July	1,565	274	3,153
Aug.	1,518	208	5,617
Sept. <i>As of Sept. 15</i>	1,109	61	2,514
	5,023 Total Clicks	+628 Followers	13,287 Total Scans

Link clicks and flyer scans capture high-intent action, showing that our messaging resonated and drove an individual to **take direct action** toward an opportunity.

HIGHLIGHTS

SC WORKS TRIDENT
americanjobcenter® | A PROGRAM OF BCDCC

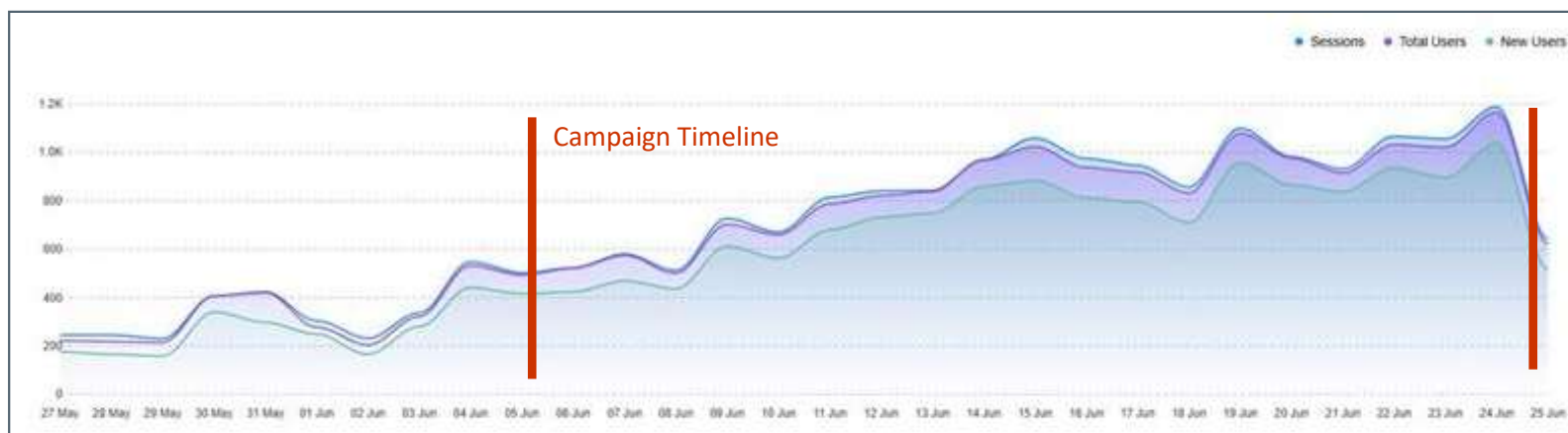
3

June 2026

WIOA Paid Ad Campaign



Website Activity – 50% growth in website traffic & new users



HIGHLIGHTS

Sept. 2026

Workforce Development Month

Interviews

- Aug. 26: WTAT Fox24, News Now
- Sept. 2: WCBD News 2
- Sept. 10: WCIV News 4, Lowcountry Live

Media Pick-Ups

- WTAT Fox24
- WCBD News 2
- WCIV News 4
- Ann McGill, Live5 News
- The Post & Courier
- Holy City Sinner
- El Informador
- 1250 WTMA News Talk
- South Carolina's Morning News, 94.3 WSC



COMING UP

SC WORKS TRIDENT
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Oct. – Nov. 2026

Collaborative Opportunities

“Wednesday Works” Bi-Weekly Events

- Branded flyer templates, digital signage (website), social media posts

Newport News HII Hiring Event, Oct. 13

Disability Employment & Resource Expo, Oct. 29

- SC Vocational Rehabilitation

Veterans Day Career Fair, Nov. 10

- Trident Technical College

Operation Employment Career Fair at USS Yorktown, Nov. 17

- Patriots Point & SC Dept. of Veterans’ Affairs

