



PEE DEE LWDA INSTRUCTION NUMBER: 21-011

To: Pee Dee LWDA Subgrantees

Subject: Tracking and Reporting Leveraged Costs

Issuance Date: September 7, 2021

Effective Date: February 1, 2021

Purpose: To provide guidance on tracking and reporting leveraged resources in support of federal and other grant opportunities.

Background: The Pee Dee Regional Council of Governments, the fiscal agent for the Pee Dee Local Workforce Development Area (LWDA), was awarded an H-1B Rural Healthcare Grant by the US Department of Labor's Employment and Training Administration. As a condition of award and a measure of success, grantees are expected to leverage the resources of other programs to align the project with broader workforce activities and position it for sustainability beyond the grant period of performance.

Recognizing that there will be other opportunities to diversify funding to provide workforce development services and that many of those opportunities will be contingent upon the Pee Dee LWDA's ability to identify and apply leveraged resources, this policy is developed to provide general guidelines for tracking and reporting those resources.

Policy: Leveraged resources are funds used in coordination with a grant to support the grant's outcomes. All resources used by subgrantees to support grant activity and outcomes may be used, whether or not those resources meet the standards required for federal match. Only allowable costs, as defined by the Uniform Guidance and the requirements of the program, may count as leveraged costs.

Subgrantees may count and document as leveraged resources any cash or in-kind commitments. Leveraged resources can come from a variety of sources, including, but not limited to federal or state funding, the private sector (e.g., businesses or industry associations); the investor community (e.g., angel networks or economic development entities); the philanthropic community (e.g., foundations); and the non-profit sector (e.g., community organizations, faith-based organizations, or education and training institutions).

Examples of leveraged resources include, but are not limited to:

- Training (classroom or work-based learning)
- Tuition grants
- Other job readiness activities and services
- Grants or matching funds for certification fees
- Grants for tools or other required, job-specific supplies
- Donated supplies, personnel services, equipment, or space

Examples of leveraged resource funding sources include, but are not limited to:

- Federal Pell Grants
- Lottery Tuition Assistance
- Public programs authorized by WIOA
- Trade Adjustment Assistance (TAA) program
- Department of Labor National Dislocated Worker Grants
- State funding

Action: Subgrantees that are required to track and report leveraged resources must ensure that appropriate internal processes are established to accurately capture those costs and that, as part of their monthly financial reporting, they report them using Attachment A. Subgrantees must also keep appropriate source documentation on file to support reported leveraged costs, to include a record of actual costs and the funding source from which they are paid. Ideally, adequate support documentation would be the same as what is required for actual costs billed to the grant (i.e. copy of a school bill, scholarship budget, OJT invoice, or other documenting reflecting costs incurred in support of the grant or its participants.) It is not necessary to submit back-up documentation to support the leveraged costs reported, but documentation should be available for review by the Pee Dee LWDA and/or the grantor agency upon request.

Please note that the effective date of this instruction is February 1, 2021. Therefore, any leveraged resources that were used in support of a project after February 1, 2021 must be cumulatively reported on the September 2021 report due to the LWDA on October 10, 2021.

Questions pertaining to this instruction should be directed to Joette Dukes at (843) 702-3144.



Joette R. Dukes
Workforce Development Director



**PEE DEE WORKFORCE DEVELOPMENT AREA
LEVERAGED COSTS TRACKING AND REPORTING**

Attachment A

SUBGRANTEE NAME: _____

CONTACT NAME: _____

CONTACT TELEPHONE: _____

REPORT PERIOD: _____

GRANT NAME: _____

Purpose: TO REPORT THE VALUE OF COSTS LEVERAGED IN SUPPORT OF GRANT ACTIVITIES

**PART I
HOURS CONTRIBUTED IN SUPPORT OF THE GRANT**

	<u>FUNCTION</u>	<u>HOURS</u>	<u>X</u>	<u>HOURLY VALUE</u>	<u>=</u>	<u>ENDING VALUE FOR THE PERIOD LISTED ABOVE</u>
1)						\$ -
2)						\$ -
3)						\$ -
4)						\$ -
5)						\$ -

Sub-Total \$ -

**Hourly rate may include fringe and indirect costs associated with the hours worked.*

**PART II
CONTRIBUTIONS OTHER THAN PERSONNEL COSTS (i.e. tuition grants, on-the-job training, etc.)**

	<u>DESCRIPTION OF LEVERAGED COST</u>	<u>TOTAL VALUE FOR THE PERIOD LISTED ABOVE</u>
1)		
2)		
3)		
4)		
5)		

Sub-Total \$ -

**Submit original and maintain a copy of this form with supporting documentation for all reported costs for your records.*

SIGNATURE/DATE: _____

Total Leveraged Costs \$ -



PEE DEE WORKFORCE DEVELOPMENT AREA
LEVERAGED COSTS TRACKING AND REPORTING

Example

Attachment A

SUBGRANTEE NAME: Pee Dee Regional COG

CONTACT NAME: Joette Dukes

CONTACT TELEPHONE: (843)123-4567

REPORT PERIOD: February 1, 2021 - August 31, 2021

GRANT NAME: Level UP H-1B Rural Healthcare Grant

Purpose: TO REPORT THE VALUE OF COSTS LEVERAGED IN SUPPORT OF GRANT ACTIVITIES

PART I

HOURS CONTRIBUTED IN SUPPORT OF THE GRANT

	FUNCTION	HOURS	X	HOURLY VALUE	=	ENDING VALUE FOR THE PERIOD LISTED	
1)	SCWOS Coordinator	40		50	\$	2,000	
2)						0	
3)						0	
4)						0	
5)						0	
						Sub-Total	\$ 2,000

*Hourly rate may include fringe and indirect costs associated with the hours worked. Activity logs may be used to support personnel costs.

PART II

CONTRIBUTIONS OTHER THAN PERSONNEL COSTS (i.e. tuition grants, on-the-job training, etc.)

	DESCRIPTION OF LEVERAGED COST	TOTAL VALUE FOR THE PERIOD	
1)	Pell Grants Awarded in support of H-1B Participants	\$ 10,000	
2)	OJT Reimbursements	\$ 5,000	
3)			
4)			
5)			
		Sub-Total	\$ 15,000

*Submit original and maintain a copy of this form with supporting documentation for all reported costs for your records.

SIGNATURE/DATE: _____

Total Leveraged Costs \$ 17,000