

Appendices for the Supporting Statement for New Data Collection Request Package

Appendix C: JOLI Performance Progress Report Forms

Appendix D: Instructions for Completing the JOLI Performance Progress Report

Appendix C: JOLI Performance Progress Report Forms COVER PAGE

| | | Page | of Pages |
|--|---|---|-------------|
| 1. Federal Agency and Organization Element to Which Report is Submitted | 2. Federal Grant or Other Identifying Number Assigned by Federal Agency | 3a. DUNS Number | |
| | | 3b. EIN | |
| 4. Recipient Organization (Name and complete address including zip code) | | 5. Recipient Identifying Number or Account Number | |
| 6. Project/Grant Period Start Date: <i>(Month, Day, Year)</i> | 7. Reporting Period End Date <i>(Month, Day, Year)</i> | 8. Final Report? <input type="checkbox"/> Yes <input type="checkbox"/> No | |
| End Date: <i>(Month, Day, Year)</i> | <i>(Month, Day, Year)</i> | 9. Report Frequency <input type="checkbox"/> <i>annual</i> <input type="checkbox"/> <i>semi-annual</i> <input type="checkbox"/> <i>quarterly</i> <input type="checkbox"/> <i>other</i> <i>(If other, describe: _____)</i> _____) | |
| 10. Performance Narrative <i>(attach performance narrative as instructed by the awarding Federal Agency)</i> | | | |
| 11. Other Attachments <i>(attach other documents as needed or as instructed by the awarding Federal Agency)</i> | | | |
| 12. Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents. | | | |
| 12a. Typed or Printed Name and Title of Authorized Certifying Official | | 12c. Telephone <i>(area code, number and extension)</i> | |
| | | 12d. Email Address | |
| 12b. Signature of Authorized Certifying Official | | 12e. Date Report Submitted <i>(Month, Day, Year)</i> | |
| | | 13. Agency use only | |

Appendix C: JOLI Performance Progress Report Forms
Performance Measures SF-PPR Form A

| | | | | | |
|---|---|----------|--|----|-------|
| 1. Federal Agency and Organization Element to Which Report is Submitted | 2. Federal Grant or Other Identifying Number Assigned by Federal Agency | 3a. DUNS | Page | of | Pages |
| | | 3b. EIN | 4. Reporting Period End Date (Month, Day, Year) | | |

A. Performance Measures

| (1) Indicator Number | (2) Objective/Goal | (3) Indicator | (4) Baseline | (5) Project Target | (6) Actual To Date | (7) Explanation |
|-------------------------|---|---|-----------------|-----------------------|-----------------------|--------------------|
| A-01-B | Create new businesses to employ low-income individuals | Total # of new businesses created | | | | |
| A-02-B | | # of new businesses that were created AT LEAST 12 months ago | | | | |
| A-03-B | | # of new businesses created at least 12 months ago that have been or were operational in the community for AT LEAST 12 consecutive months | | | | |
| A-04-B | Expand existing businesses to employ low-income individuals | Total # of businesses expanded | | | | |
| A-05-J | Create positions to employ low-income individuals | Total # of part-time positions created | | | | |
| A-06-J | | Total # of full-time positions created | | | | |
| A-07-J | | # of those full-time positions that were created AT LEAST six months ago | | | | |
| A-08-J | | # of full-time positions created that have been or were operational in the community | | | | |

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| | | for AT LEAST six consecutive months | | | | | |
| A-09-J | Create full-time positions with benefits | Total # of full-time positions created with health care benefits | | | | | |
| A-10-J | | Total # of full-time positions created with paid sick leave | | | | | |
| A-11-J | | Total # of full-time positions created with retirement benefits | | | | | |
| A-12-J | | Total # of full-time positions created with profit-sharing | | | | | |
| A-13-E | Prepare low-income individuals for employment | Total # of low-income individuals trained in skills for the jobs created | | | | | |
| A-14-E | | # of those low-income individuals trained who were TANF recipients | | | | | |
| A-15-E | Employ low-income individuals in positions created | Total # of low-income individuals, including TANF recipients, employed in the full-time positions created | | | | | |
| A-16-E | | # of those low-income individuals employed who were TANF recipients | | | | | |
| A-17-E | Create full-time positions with opportunity for advancement | Average STARTING wage of all low-income individuals, including TANF recipients, | | | | | |

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|--------|---|---|--|--|--|--|--|
| | | placed in full-time positions created | | | | | |
| A-18-E | | Average STARTING wage of TANF recipients placed in full-time positions created | | | | | |
| A-19-E | | # of individuals in full-time positions created who received job promotions | | | | | |
| A-20-E | | # of individuals in full-time positions created who received pay raises | | | | | |
| A-21-E | Help low-income individuals retain new jobs | Total # of low-income individuals who were hired into a JOLI-created full-time position AT LEAST six months ago | | | | | |
| A-22-E | | Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months | | | | | |
| A-23-E | | # of TANF recipients who were hired into a JOLI-created full-time position AT LEAST six months ago | | | | | |
| A-24-E | | # of TANF recipients who retained their full-time jobs for AT LEAST | | | | | |

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| | | six consecutive months | | | | | |
| A-25-F | Leverage additional funds to increase project success | How many total has your project leveraged? | | | | | |
| A-26-F | | How many dollars has your project leveraged from government funds? | | | | | |
| A-27-F | | How many dollars has your project leveraged from the private sector? | | | | | |
| A-28-F | | How many dollars has your project leveraged from loans? | | | | | |
| A-29-F | | How many dollars has your project leveraged from other sources? | | | | | |
| A-30-F | Generate revenue through JOLI-created businesses | How much program income has your JOLI project generated? | | | | | |

Notes on SF-PPR Form A:

The numbers identify the type of information requested:

- B indicates that these fields describe progress on outcomes related to new business creation information
- J indicates that these fields describe progress on outcomes related to new job creation information
- E indicates that these fields describe progress on outcomes related to participant employment information
- F indicates that these fields describe progress on outcomes related to leveraging additional funds.

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Program Indicators SF-PPR Form B

| | | | |
|---|--|----------|---|
| | | Page | of Pages |
| 1. Federal Agency and Organization Element to Which Report is Submitted | 2. Federal Grant or Other Identifying Number Assigned by Federal Agency | 3a. DUNS | 4. Reporting Period End Date <i>(Month, Day, Year)</i> |
| | | 3b. EIN | |
| B. Program Indicators | | | |
| (1) Activity Number or Label | (2) Activity Description | (3) | (4) Explanation |
| Project Description | | | |
| A-01 | Project Strategy | | |
| A-02 | Type(s) of New Business Created | | |
| A-03 | Distinctive Characteristics of Participants | | |
| A-04 | Distinctive Characteristics of Community | | |
| A-05 | Geographic location | | |
| A-06 | Public Partnerships | | |
| A-07 | Will or did your organization purchase equity in a business with JOLI grant funds? | | |
| A-08 | Will or did your organization create a revolving loan fund with JOLI funds? | | |
| Highlights & Major Accomplishments | | | |
| B-01 | New Business Creation | | |
| B-02 | Business Expansion | | |
| B-03 | New Job Creation | | |
| B-04 | Population Served | | |
| B-05 | Participant Recruitment | | |
| B-06 | Participant Training | | |
| B-07 | Participant Placement in Jobs | | |
| B-08 | Participant Retention | | |
| B-09 | Funding Leveraged | | |
| B-10 | Partnerships | | |
| B-11 | Evaluation | | |
| B-12 | Other Accomplishments | | |
| Challenges & Resolutions | | | |
| C-01 | New Business Creation | | |
| C-02 | Business Expansion | | |
| C-03 | New Job Creation | | |
| C-04 | Population Served | | |
| C-05 | Participant Recruitment | | |
| C-06 | Participant Training | | |
| C-07 | Participant Placement in Jobs | | |
| C-08 | Participant Retention | | |
| C-09 | Funding Leveraged | | |
| C-10 | Partnerships | | |
| C-11 | Composition of Board of Directors | | |
| C-12 | Evaluation | | |
| C-13 | Other Challenges | | |
| Changes | | | |
| D-01 | Planned Services | | |
| D-02 | Planned Timeline | | |
| D-03 | Planned Outcomes | | |

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| | | | |
|------|-------------------|--|--|
| D-04 | Budget | | |
| D-05 | Leveraged Funding | | |
| D-06 | Partnerships | | |
| D-07 | Staffing | | |
| D-08 | Board Leadership | | |
| D-09 | In the Community | | |
| D-10 | In the Field | | |
| D-11 | Evaluation | | |
| D-12 | Other Changes | | |

**Appendix C: JOLI Performance Progress Report Forms
Activity Based Expenditures SF-PPR-E**

| | | | | | | |
|---|-------------------------------------|---|---|---------------------------------|----|---|
| 1. Federal Agency and Organization Element to Which Report is Submitted | | 2. Federal Grant or Other Identifying Number Assigned by Federal Agency | 3a. DUNS | Page | of | Pages |
| | | | 3b. EIN | | | 4. Reporting Period End Date <i>(Month, Day, Year)</i> |
| E. Activity Based Expenditures | | | | | | |
| (1) Activity Number or Label | (2) Activity Description | | (3) Total Estimated Expenditures | (4) Funding Expended | | |
| E-01 | | | | | | |
| E-02 | | | | | | |
| E-03 | | | | | | |
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Appendix D: Instructions for Completing the JOLI Performance Progress Report

Instructions for Completion of the JOLI Performance Progress Report

The Performance Progress Report will be used by the Office of Community Services to collect comparative data required to account for the expenditure of Federal funds, assess the progress and impact of the Job Opportunities for Low-income Individuals (JOLI) program and provide feedback to assist grantees.

The data collected also fulfill the requirements of the Office of Management and Budget (OMB) for assessing program performance.

Instructions for Cover Page

| Item | Data Elements | Instructions |
|------|--|--|
| 1. | Awarding Federal agency and Organizational Element to Which Report is Submitted | Enter the name of the awarding Federal agency and organizational element identified in the award document or otherwise instructed by the agency. The organizational element is a sub-agency within an awarding Federal agency. |
| 2. | Federal Grant or Other Identifying Number Assigned by the awarding Federal agency | Enter the grant/award number contained in the award document. |
| 3a. | DUNS Number | Enter the recipient organization's Data Universal Numbering System (DUNS) number or Central Contract Registry extended DUNS number. |
| 3b. | EIN | Enter the recipient organization's Employer Identification Number (EIN) provided by the Internal Revenue Service. |
| 4. | Recipient Organization | Enter the name of recipient organization and address, including ZIP code. |
| 5. | Recipient Account Number or Account Number | Enter the account number or any other identifying number assigned by the recipient to the award. This number is strictly for the recipient's use only and is not required by the awarding Federal agency. |
| 6. | Project/Grant Period | Indicate the project/grant period established in the award document during which Federal sponsorship begins and ends. |
| 7. | Reporting Period End Date | Enter the ending date of the reporting period. For semi-annual, and annual reports, the following calendar quarter reporting period end dates shall be used: 3/31 and 9/30. For final PPRs, the reporting period end date shall be the end date of the project/grant period. . |

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| Item | Data Elements | Instructions |
|------|----------------------------------|---|
| 8. | Final Report | Mark appropriate box. Check “yes” only if this is the final report for the project/grant period specified in Box 6. |
| 9. | Report or Frequency | Select the appropriate term corresponding to the requirements contained in the award document. “Other” may be used when more frequent reporting is required for high-risk grantees, as specified in OMB Circular A-110. |
| 10. | Performance Narrative | Leave blank and complete Form ACF-OGM-SF-PPR-B |
| 11. | Other Attachments | Attach other documents as needed or as instructed by the awarding Federal agency. |
| 12a. | Certification – Name | Type or print the name and title of the Authorized Certifying Official. |
| 12b. | Certification - Signature | The Authorized Certifying Official should sign here. |
| 12c. | Certification – Phone | Enter the area code, phone number and extension of the Authorized Certifying Official. |
| 12d. | Certification – Email | Enter the email address of the Authorized Certifying Official. |
| 12e. | Certification – Date | Enter the date (month, day, year) the report is submitted. |

Instructions for JOLI SF-PPR Form A

Form A will primarily collect the quantitative data about your project.

Please enter the page number and total number of pages in the report in the upper right corner

Please enter Items 1, 2, 3a, and 3b according to the instructions for the same items on the cover sheet.

Please enter the end date of the reporting period for this report in Item 4.

The Performance Measures Table for the SF-PPR Form A

Column 1 lists the indicator number. The A corresponds to the form; the number corresponds to the sequential question or line of data, and the last letter (B, J, E, F) identifies the type of information requested. B indicates that these fields are related to new business creation information. J indicates that these fields are related to new job creation information. E indicates

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that these fields are related to participant employment information. F indicates that this field is related to leveraging additional funds.

Column 2 describes the program goal. For example, “New businesses created to employ low-income individuals.”

Column 3 describes the indicators of progress toward the goal in Column 2 to be used to report in the rest of the columns in the row. Indicators are measurable elements of the desired results of the program. For example, “The # of new businesses created” and “The # of new businesses created that have stayed in operation for AT LEAST 12 months.”

Column 4 describes where the project started on this goal. This is described by entering the value of the indicator at the start of [the project, the year or the reporting period- a decision you will want to make]. For example at the beginning of [project/year/reporting period] 10 jobs may have been created, so at the beginning of the [next period] the baseline for the # of jobs created would be 10. In the first [year/reporting period or at the beginning of the project] this number would be 0. In subsequent reports, this number would be the same number that was entered in the “actual to date” column in the previous report.

Column 5 describes the final target for the project. So continuing the example, if the project expects to create 25 jobs at the end of the project, this number would be 25. This number will not change from one reporting period to another.

Column 6 documents the grantees cumulative progress towards the project goal. For example, at the end of the second year the grantee may have created a total of 27 jobs, two more than it had planned on.

Column 7 provides the grantee space to provide any additional data that the OCS Project Specialist might need to better understand the data. For example, the grantee may use this space to explain any variance between actual performance (Column 7) and the performance target (Column 5 or 6)

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Objectives & Goals and Indicators –

The table below has five columns:

Column 1, “Indicator number,” contains the corresponding question number on the PPR form.

Column 2, “Indicator,” contains the question, or data element, requested on the PPR form.

Column 3, “Description,” contains a description of the data requested. In some cases, the description in this column refers to just one indicator; in others, it pertains to multiple related indicators. This description elaborates on the questions in the PPR and provides clarification on the data requested. In cases where the description applies to multiple indicators, it clarifies relationships between the multiple indicators.

Column 4, “Check your data,” defines relationships among related answers. The inequalities listed in each cell specify which data elements are subsets of other data elements and should therefore contain numbers that are not greater than the answers for which they are a subset. You should use the information in this column to ensure you filled out the PPR form properly.

Column 5, “Example,” provides sample scenarios and how the data would be recorded in the PPR.

The objectives and goals describe the information that OCS wants the grantee not only to collect, but to include in the grant and annual planning. Given the diversity of JOLI projects, not all of the objectives will apply to every grantee.

| Indicator number | Indicator | Description of Indicator | Check your data | Example (if relevant) | | | | | | | | | | |
|--|--|--|--|---|----------|--|------------------------------|----|--|----|---|----|-----------------------------|---|
| Objective: Create new businesses to employ low-income individuals | | | | | | | | | | | | | | |
| A-01-B | Total # of new businesses created | This indicator measures how many total businesses were created with the JOLI grant | $A-01-B \geq A-02-B$ | <table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total new businesses created</td> <td>20</td> </tr> <tr> <td>Number of those that were created AT LEAST 12 months ago</td> <td>15</td> </tr> <tr> <td>Number of those that are still in existence</td> <td>10</td> </tr> <tr> <td>Number of those that are no</td> <td>5</td> </tr> </tbody> </table> | Scenario | | Total new businesses created | 20 | Number of those that were created AT LEAST 12 months ago | 15 | Number of those that are still in existence | 10 | Number of those that are no | 5 |
| Scenario | | | | | | | | | | | | | | |
| Total new businesses created | 20 | | | | | | | | | | | | | |
| Number of those that were created AT LEAST 12 months ago | 15 | | | | | | | | | | | | | |
| Number of those that are still in existence | 10 | | | | | | | | | | | | | |
| Number of those that are no | 5 | | | | | | | | | | | | | |
| A-02-B | # of new businesses that were created AT LEAST 12 months ago | These two indicators measure how many of the businesses that were created with JOLI funds at least 12 months ago remained in existence after 12 months. The purpose of these indicators is to measure the longevity of the businesses that have been created, while correcting for businesses that were created less than 12 | $A-02-B \leq A-01-B$ $A-02-B \geq A-03-B$ | | | | | | | | | | | |

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| Indicator number | Indicator | Description of Indicator | Check your data | Example (if relevant) | | | | | | | | | | | | | | | | |
|---|--|--|--|--|---------------------|--|--|-----|---------------------------------------|----|-----------------------------------|----|----------------|--|--------|-----|--------|----|--------|----|
| A-03-B | # new businesses created AT LEAST 12 months ago that have been or were operational in the community for AT LEAST 12 consecutive months | months ago. This allows OCS to accurately calculate the percentage of new businesses lasting at least 12 months without having businesses less than 12 months old skew the result. NOTE: Businesses created more than 12 months ago that lasted at least 12 months but have since folded should still be counted in A-03-B. | A-03-B ≤ A-02-B | <table border="1"> <tr> <td>longer in existence</td> <td></td> </tr> <tr> <td>Number of businesses created less than 12 months ago</td> <td>5</td> </tr> </table> | longer in existence | | Number of businesses created less than 12 months ago | 5 | | | | | | | | | | | | |
| longer in existence | | | | | | | | | | | | | | | | | | | | |
| Number of businesses created less than 12 months ago | 5 | | | | | | | | | | | | | | | | | | | |
| Objective: Expand existing businesses to employ low-income individuals | | | | Answers | | | | | | | | | | | | | | | | |
| A-04-B | Total # of businesses expanded | This indicator measures the number of already-existing businesses that were expanded using JOLI funds. It does not measure new businesses that were created with JOLI funds, but rather businesses that existed before the JOLI grant and that the JOLI grant helped expand. | | | | | | | | | | | | | | | | | | |
| Objective: Create positions to employ low-income individuals | | | | | | | | | | | | | | | | | | | | |
| A-05-J | Total # of part-time positions created | This indicator measures the total number of part-time positions that were created using JOLI funds. | | | | | | | | | | | | | | | | | | |
| A-06-J | Total # of full-time positions created | This indicator measures the total number of positions created with JOLI funds, regardless of whether they were filled by TANF recipients. | A-06-J ≥ A-07-J A-06-J ≥ A-08-J A-06-J ≤ A-21-E | <table border="1"> <tr> <th colspan="2">Scenario</th> </tr> <tr> <td>Total full-time jobs created</td> <td>100</td> </tr> <tr> <td>FT jobs created AT LEAST 6 months ago</td> <td>60</td> </tr> <tr> <td>FT jobs lasting AT LEAST 6 months</td> <td>30</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-06-J</td> <td>100</td> </tr> <tr> <td>A-07-J</td> <td>60</td> </tr> <tr> <td>A-08-J</td> <td>30</td> </tr> </table> | Scenario | | Total full-time jobs created | 100 | FT jobs created AT LEAST 6 months ago | 60 | FT jobs lasting AT LEAST 6 months | 30 | Answers | | A-06-J | 100 | A-07-J | 60 | A-08-J | 30 |
| Scenario | | | | | | | | | | | | | | | | | | | | |
| Total full-time jobs created | 100 | | | | | | | | | | | | | | | | | | | |
| FT jobs created AT LEAST 6 months ago | 60 | | | | | | | | | | | | | | | | | | | |
| FT jobs lasting AT LEAST 6 months | 30 | | | | | | | | | | | | | | | | | | | |
| Answers | | | | | | | | | | | | | | | | | | | | |
| A-06-J | 100 | | | | | | | | | | | | | | | | | | | |
| A-07-J | 60 | | | | | | | | | | | | | | | | | | | |
| A-08-J | 30 | | | | | | | | | | | | | | | | | | | |
| A-07-J | # of those full-time positions that were created AT LEAST six months ago | These two indicators measure how many of the positions that were created at least six months ago remained in existence six months after they were created. The purpose of this indicator is to measure the longevity of positions created, while correcting for positions that were created less than six months ago. This allows OCS to accurately calculate the percentage of new positions lasting at least six months without having jobs less than six months old skew the result. NOTE: Positions that were created more than six months ago and lasted at least six months but no longer exist should still be counted in A-08-J. | A-07-J ≤ A-06-J A-07-J ≥ A-08-J | | | | | | | | | | | | | | | | | |
| A-08-J | # of full-time positions created that have been or were operational in the community for AT LEAST six consecutive months | | A-08-J ≤ A-06-J A-08-J ≤ A-07-J | | | | | | | | | | | | | | | | | |

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| Indicator number | Indicator | Description of Indicator | Check your data | Example (if relevant) | | | | | | | | | | | | | | |
|--|---|--|--|---|----------|--|--|-----|--|-----|---|----|---------|-----|--------|-----|--------|----|
| Objective: Create full-time positions with benefits | | | | | | | | | | | | | | | | | | |
| A-09-J | Total # of full-time positions created with health care benefits | These four indicators document the quality of the positions created. Not all grantees can create positions with health care benefits or opportunity for advancement. However, those grantees that do will want to show the accomplishment of creating higher quality jobs. | A-09-J ≤ A-06-J | | | | | | | | | | | | | | | |
| A-10-J | Total # of full-time positions created with sick leave | | A-10-J ≤ A-06-J | | | | | | | | | | | | | | | |
| A-11-J | Total # of full-time positions created with retirement benefits | | A-11-J ≤ A-06-J | | | | | | | | | | | | | | | |
| A-12-J | Total # of full-time positions created with profit-sharing | | A-12-J ≤ A-06-J | | | | | | | | | | | | | | | |
| Objective: Prepare low-income individuals for employment | | | | | | | | | | | | | | | | | | |
| A-13-E | Total # of low-income individuals trained in skills for the jobs created | This indicator documents the number of low-income individuals who were trained. It includes TANF recipients. | A-13-E ≥ A-14-E | <table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Number of low-income individuals trained by JOLI program</td> <td>100</td> </tr> <tr> <td>Number of those low-income individuals who were TANF recipients</td> <td>20</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-13-E</td> <td>100</td> </tr> <tr> <td>A-14-E</td> <td>20</td> </tr> </tbody> </table> | Scenario | | Number of low-income individuals trained by JOLI program | 100 | Number of those low-income individuals who were TANF recipients | 20 | Answers | | A-13-E | 100 | A-14-E | 20 | | |
| Scenario | | | | | | | | | | | | | | | | | | |
| Number of low-income individuals trained by JOLI program | 100 | | | | | | | | | | | | | | | | | |
| Number of those low-income individuals who were TANF recipients | 20 | | | | | | | | | | | | | | | | | |
| Answers | | | | | | | | | | | | | | | | | | |
| A-13-E | 100 | | | | | | | | | | | | | | | | | |
| A-14-E | 20 | | | | | | | | | | | | | | | | | |
| A-14-E | # of those low-income individuals trained who were TANF recipients | This indicator documents the number of low-income individuals who were trained who were TANF recipients when they first took part in JOLI-funded training. | A-14-E ≤ A-13-E | | | | | | | | | | | | | | | |
| Objective: Employ low-income individuals in the positions created | | | | | | | | | | | | | | | | | | |
| A-15-E | Total # of low-income individuals, including TANF recipients, employed in the full-time positions created | This indicator measures the total number of low-income individuals placed in the full-time positions created with JOLI funds. This number accounts for turnover. | A-15-E ≥ A-06-J A-15-E ≥ A-16-E A-15-E ≥ A-21-E | <table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total jobs created</td> <td>100</td> </tr> <tr> <td>Total number of low-income individuals employed in those jobs through the course of the grant period</td> <td>125</td> </tr> <tr> <td>Total number of those low-income individuals who were TANF recipients</td> <td>50</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-15-E</td> <td>125</td> </tr> <tr> <td>A-16-E</td> <td>50</td> </tr> </tbody> </table> | Scenario | | Total jobs created | 100 | Total number of low-income individuals employed in those jobs through the course of the grant period | 125 | Total number of those low-income individuals who were TANF recipients | 50 | Answers | | A-15-E | 125 | A-16-E | 50 |
| Scenario | | | | | | | | | | | | | | | | | | |
| Total jobs created | 100 | | | | | | | | | | | | | | | | | |
| Total number of low-income individuals employed in those jobs through the course of the grant period | 125 | | | | | | | | | | | | | | | | | |
| Total number of those low-income individuals who were TANF recipients | 50 | | | | | | | | | | | | | | | | | |
| Answers | | | | | | | | | | | | | | | | | | |
| A-15-E | 125 | | | | | | | | | | | | | | | | | |
| A-16-E | 50 | | | | | | | | | | | | | | | | | |
| A-16-E | # of those low-income individuals employed who were TANF recipients | This indicator measures the total number of low-income individuals who were TANF recipients at the time they were placed in the full-time positions created with JOLI funds. This number accounts for turnover. | A-16-E ≤ A-15-E A-16-E ≥ A-23-E | | | | | | | | | | | | | | | |
| Objective: Create full-time positions with opportunity for advancement | | | | | | | | | | | | | | | | | | |
| A-17-E | Average STARTING wage of all low-income individuals, including TANF recipients, placed in full-time positions | These two indicators measure the average wage at which individuals in JOLI-funded positions are hired. These numbers only account for starting wage, and do not factor in the new wages of | | | | | | | | | | | | | | | | |

Appendix D: Instructions for Completing the JOLI Performance Progress Report

| Indicator number | Indicator | Description of Indicator | Check your data | Example (if relevant) | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|--|--|--|----------|--|--------------------|-----|---|-----|---|----|---|----|---|----|--|----|---|----|---------|--|--------|----|--------|----|--------|----|--------|----|
| A-18-E | Average STARTING wage of TANF recipients placed in full-time positions created | employees who have been awarded raises. These two indicators measure the upward mobility in the jobs created. | A-19-E ≤ A-15-E A-20-E ≤ A-15-E | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-19-E | # of individuals in positions created who received job promotions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-20-E | # of individuals in full-time positions created who received pay raises | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Objective: Help low-income individuals retain new jobs | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-21-E | Total # of low-income individuals who were hired into a JOLI-created full-time position AT LEAST six months ago | These two indicators measure the total number of low-income individuals who were employed in a job created with JOLI funds and remained in that job for at least six consecutive months. It includes individuals who retained their jobs for at least six months and then left the jobs, as well as individuals who retained their jobs for longer than six months. Low-income individuals include TANF recipients. | A-21-E ≥ A-06-J A-21-E ≤ A-15-E A-21-E ≥ A-22-E A-21-E ≥ A-23-E | <table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total jobs created</td> <td>100</td> </tr> <tr> <td>Total low-income individuals employed in the jobs created</td> <td>125</td> </tr> <tr> <td>Number of those low-income individuals who were hired AT LEAST 6 months ago</td> <td>60</td> </tr> <tr> <td>Number of those low-income individuals employed who kept their jobs for AT LEAST 6 months</td> <td>40</td> </tr> <tr> <td>Number of the total low-income individuals employed who were also TANF recipients</td> <td>50</td> </tr> <tr> <td>Number of those TANF recipients who were hired AT LEAST 6 months ago</td> <td>25</td> </tr> <tr> <td>Number of TANF recipients who were employed AT LEAST 6 months</td> <td>20</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-21-E</td> <td>60</td> </tr> <tr> <td>A-22-E</td> <td>40</td> </tr> <tr> <td>A-23-E</td> <td>50</td> </tr> <tr> <td>A-24-E</td> <td>20</td> </tr> </tbody> </table> | | Scenario | | Total jobs created | 100 | Total low-income individuals employed in the jobs created | 125 | Number of those low-income individuals who were hired AT LEAST 6 months ago | 60 | Number of those low-income individuals employed who kept their jobs for AT LEAST 6 months | 40 | Number of the total low-income individuals employed who were also TANF recipients | 50 | Number of those TANF recipients who were hired AT LEAST 6 months ago | 25 | Number of TANF recipients who were employed AT LEAST 6 months | 20 | Answers | | A-21-E | 60 | A-22-E | 40 | A-23-E | 50 | A-24-E | 20 |
| Scenario | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total jobs created | 100 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total low-income individuals employed in the jobs created | 125 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of those low-income individuals who were hired AT LEAST 6 months ago | 60 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of those low-income individuals employed who kept their jobs for AT LEAST 6 months | 40 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of the total low-income individuals employed who were also TANF recipients | 50 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of those TANF recipients who were hired AT LEAST 6 months ago | 25 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Number of TANF recipients who were employed AT LEAST 6 months | 20 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Answers | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-21-E | 60 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-22-E | 40 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-23-E | 50 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-24-E | 20 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-22-E | Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months | A-22-E ≤ A-21-E | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-23-E | # of TANF recipients who were hired into a JOLI-created full-time position AT LEAST six months ago | These two indicators measure the total number of TANF recipients who were employed in a position created with JOLI funds and remained in that position for at least six consecutive months. It includes individuals who retained their jobs for at least six months and then left the jobs, as well as individuals who retained their jobs for longer than six months. TANF recipients are a subset of low-income individuals, so every TANF recipient should also be counted as a low-income individual. | A-23-E ≤ A-16-E A-23-E ≤ A-21-E A-23-E ≥ A-24-E | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| A-24-E | # of TANF recipients who retained their full-time jobs for AT LEAST six consecutive months | | | A-24-E ≤ A-21-E | | | | | | | | | | | | | | | | | | | | | | | | | | | |

More specific examples concerning how to count individuals employed in jobs created can be found on Page 9.

Appendix D: Instructions for Completing the JOLI Performance Progress Report

| Indicator number | Indicator | Description of Indicator | Check your data | Example (if relevant) |
|---|--|---|---|-----------------------|
| | | | <p>A-24-E ≤ A-22-E A-24-E ≤ A-23-E</p> | |
| Objective: Leverage additional funds to increase project success | | | | |
| A-25-F | How many dollars total dollars has your project leveraged? | <p>These five indicators measure the amount of money leveraged through any non-JOLI source.</p> | <p>A-25-F equals the sum of A-26-F, A-27-F, A-28-F and A-29-F</p> $\begin{array}{r} \text{A-26-F} \\ \text{A-27-F} \\ \text{A-28-F} \\ + \text{A-29-F} \\ \hline \text{A-25-F} \end{array}$ | |
| A-26-F | How many dollars has your project leveraged from government funds? | | | |
| A-27-F | How many dollars has your project leveraged from the private sector? | | | |
| A-28-F | How many dollars has your project leveraged from loans? | | | |
| A-29-F | How many dollars has your project leveraged from other sources? | | | |
| Objective: Generate revenue through JOLI-created businesses | | | | |
| A-30-E | How much program income has your JOLI project generated? | <p>This indicator measures the amount of gross revenue your JOLI project has generated. It refers to revenue generated through your JOLI-created business(es), and does not count leveraged funds. If your project has not generated any revenue, please enter 0.</p> | | |

Appendix D: Instructions for Completing the JOLI Performance Progress Report

Appendix D: Instructions for Completing the JOLI Performance Progress Report

Specific examples for how to count individuals employed in JOLI-created jobs

For all three examples that follow, assume you created Business A with your JOLI funds and that it is September 2010.

Example 1: John was hired at Business A in July 2009. When he was hired, he qualified as a low-income individual. He was also a TANF recipient. He still holds a job at Business A. John would be counted in each of the following categories:

- ✓ **A-15-E** - # of low-income individuals employed in jobs created
- ✓ **A-16-E** - # of low-income individuals employed who were TANF recipients
- ✓ **A-21-E** - Total # of low-income individuals who were hired into a JOLI-created job AT LEAST six months ago
- ✓ **A-22-E** - Total # of low-income individuals who retained their jobs for AT LEAST six consecutive months
- ✓ **A-23-E** - # of TANF recipients who were hired into a JOLI-created job AT LEAST six months ago
- ✓ **A-24-E** - Total # of individuals who were TANF recipients who retained their jobs for AT LEAST six consecutive months

Example 2: Mary was hired at Business A in June 2009. When she was hired, she qualified as a low-income individual. Mary stayed with Business A until July 2010 and then left. Mary would be counted in each of the following categories:

- ✓ **A-15-E** - Total # of low-income individuals employed in jobs created
- ✓ **A-21-E** - Total # of low-income individuals who were hired into a JOLI-created job AT LEAST six months ago
- ✓ **A-22-E** - Total # of low-income individuals who retained their jobs for AT LEAST six consecutive months

Example 3: Charlie was hired at Business A in February 2010. At the time he was hired, he qualified as a low-income individual. He was also a TANF recipient. He left the job at Business A in April 2010. Charlie would be counted in each of the following categories:

- ✓ **A-15-E** - Total # of low-income individuals employed in jobs created
- ✓ **A-16-E** - # of low-income individuals employed who were TANF recipients
- ✓ **A-21-E** - Total # of low-income individuals who were hired into a JOLI-created job AT LEAST six months ago
- ✓ **A-23-E** - # of TANF recipients who were hired into a JOLI-created job AT LEAST six months ago

Example 4: Jennifer was hired at Business A in July 2010. When she was hired, she qualified as a low-income individual. Jennifer still holds a job at Business A. Jennifer would be counted in each of the following categories:

- ✓ **A-15-E** - Total # of low-income individuals employed in jobs created

Appendix D: Instructions for Completing the JOLI Performance Progress Report

Form B

Form B is designed to provide a structured format to discuss your JOLI programs as you would in the semi-annual reports and address or explain any issues raised in Form A. It will primarily collect the qualitative data that OCS Program Specialists need to monitor the program.

Please enter the page number and total number of pages in the upper right corner.

Please enter Items 1, 2, 3a, and 3b according to the instructions for the same items on the cover sheet.

Please enter the end date of the reporting period for this report in Item 4.

Indicators and examples

| Number | Indicator | Examples |
|--------|--|--|
| A-01 | Project Strategy | Business creation, business expansion, microenterprise, non-traditional job- training and placement, self-employment |
| A-02 | Type(s) of New Business Created | Microenterprise, grocery store, strip mall, factory, etc. |
| A-03 | Distinctive Characteristics of Participants | Demographics, need, etc. |
| A-04 | Distinctive Characteristics of Community | Empowerment Zone, history, poverty level, crime rate, etc. |
| A-05 | Geographic location | Urban OR Rural |
| A-06 | Public Partnerships | State or local TANF agency, employment agency and/or child support enforcement office, etc. |
| A-07 | Will or did your organization purchase equity in a business with JOLI grant funds? | Yes or No: If yes, please describe the investment and the investment amount. |
| A-08 | Will or did your organization create a revolving loan fund with JOLI funds? | Yes or No: If yes, please describe. |

Activity Description

There are four sections to Form B.

Project Description – This section provides space for basic data describing the project. I wonder if for this section, we need an instruction for each row?

Highlights & Major Accomplishments – This section provides a place to document key successes in the project. The 10 specified topics in Column 2 are suggested areas where you may have experienced success. An additional line is included for accomplishments that are not covered by the 10 distinct topics. Column 4 provides an opportunity to describe accomplishments for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.

Challenges (or problems) & Resolutions (or steps taken) – This section mostly mirrors the highlights section but collects data on the challenges faced in the reporting period, and how those challenges were or will be addressed. The 11 specified topics in Column 2 are suggested areas where you may have experienced challenges. An additional line is included for challenges that are not covered by the specific topics. Column 4 provides an opportunity to describe challenges

Appendix D: Instructions for Completing the JOLI Performance Progress Report

and resolutions for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.

Changes – This section documents for the OCS Program Specialist any significant changes in the project that may impact future success and/or need to be documented. The 10 specified topics in Column 2 are suggested areas where you may have undergone changes. An additional line is included for changes that are not covered by the specific topics. Column 4 provides an opportunity to describe challenges and resolutions for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.

Form E

Form E is designed to collect financial information about your JOLI project. It will address expenditure amounts for each activity type.

Columns

Column 1 lists the item number. This number should always be preceded by an *E*.

Column 2 describes the issue or activity that grantee will address in Column 4.

Column 3 is to be left blank.

Column 4 should contain the total amount expended during the performance period on the activity described in Column 2.

Definitions

Business creation – New businesses that did not exist prior to the start of the project and were created as a result of the start of the project. This includes the creation of any new business, including microenterprise. It does not include the expansion of already existing businesses.

Community – Any geographic area defined by specific boundaries.

Full-time jobs – New full-time, permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. Full-time means a minimum of 36 hours per week.

Job creation – New permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. These activities can include jobs created through the development of new business ventures, the expansion of existing businesses, or the development of new products and services. Please note that the training and placement of individuals in already existing jobs, even jobs guaranteed to low-income individuals through a formal agreement with an employer, is not considered job creation.

Leveraged funds – All non-JOLI funding used for the JOLI project. These sources may include, but are not limited to other Federal, state, or local government funding, private loans and investments, and/or philanthropic contributions.

Appendix D: Instructions for Completing the JOLI Performance Progress Report

Low-income individual – A low-income individual whose income level does not exceed 100 percent of the official poverty line as found in the most recent revision of the Poverty Income Guidelines published by HHS. These guidelines may be found at <http://aspe.hhs.gov/poverty/index.shtml>

Part-time jobs – New part-time, permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. Part-time means less than 36 hours per week.

TANF recipient – A TANF recipient receives assistance through ACF's Temporary Assistance for Needy Families (TANF) program. This is a subset of low-income individuals.