

Legislative Oversight Committee

South Carolina House of Representatives

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Restructuring & Seven-Year Plan Report Guidelines

February 27, 2015

RESTRUCTURING & SEVEN-YEAR PLAN

South Carolina Jobs-Economic Development Authority

Date of Submission: *March 31, 2015*

Please provide the following for this year's Restructuring and Seven-Year Plan Report.

	Name	Date of Hire	Email
Agency Director	Harry A. Huntley	8-1-2008	hhuntley@scjeda.com
Previous Agency Director	Elliott Franks	Unknown	Deceased

	Name	Phone	Email
Primary Contact:	Harry A. Huntley	737-0627	hhuntely@scjeda.com
Secondary Contact:	Claudia Miller	737-0284	cmiller@scjeda.com

Is the agency vested with revenue bonding authority? (re: Section 2-2-60(E))	YES
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I have reviewed and approved the enclosed 2015 Restructuring and Seven-Year Plan Report, which are complete and accurate to the extent of my knowledge.

**Current Agency
Director**

(Sign/Date):

/s/ Harry A. Huntley - original submitted with signature

(Type/Print Name):

HARRY A. HUNTLEY

**If applicable,
Board/Commission
Chair**

(Sign/Date):

/s/ Michael W. Nix - original submitted with signature

(Type/Print Name):

MICHAEL W. NIX

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Insert the appropriate page numbers once the agency has completed the report.

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EXECUTIVE SUMMARY

I. Executive Summary

A. Historical Perspective

1. Please complete the **Historical Perspective Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Historical Perspective." In this chart the Committee is asking the agency to provide a bullet style list of any major changes in the agency's purpose or mission and any restructuring that occurred (i.e., combining with or taking on other agency responsibilities, etc.) during the last ten years.

B. Purpose, Mission and Vision

1. Please complete the **Purpose/Mission/Vision Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Purpose, Mission." The other specifics are included in the template.

C. Key Performance Measure Results

1. After completing the Key Performance Measurement Processes Section of this Report, please come back to this question and provide a summary of the results (bullet style results only, explanations should be included in the Key Performance Measurement Processes Section).

ORGANIZATIONAL PROFILE

II. Organizational Profile

This section asks for a fact based description of the agency. Please provide information in the stated Excel template. If an Excel template is not referenced, provide the information in bullet style.

1. The agency's main deliverables (i.e., products or services) and the primary methods by which these are provided;
 - a. Complete the **Key Deliverables Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Deliverables."
2. The agency's key customers and their requirements and expectations;
 - a. Complete the **Key Customers Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Customers;"
3. The agency's key stakeholders (other than customers);
 - a. Complete the **Key Stakeholders Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Stakeholders;"
4. Other state agencies which have the biggest impact on the agency's mission success;
 - a. Complete the **Key Partner Agency Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Key Partner Agencies."
5. The agency's performance improvement system(s);
6. The agency's organizational structure in flow chart format;
7. Details about the body to whom the Agency Head reports;
 - a. Complete the **Overseeing Body Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Overseeing Body-General" and "Overseeing Body-Individual Member."
8. Please complete the **Major Program Areas Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Major Program Areas."
9. Please identify any emerging issues the agency anticipates may have an impact on its operations in the upcoming five years.

ORGANIZATIONAL PROFILE

III. Laws (Statutes, Regulations, Provisos)

This section asks for state and federal statutes, regulations and provisos (“Laws”) which apply to the agency.

1. Please complete the **Legal Standards Chart**. In the Excel document attached, there is a template to complete under the tab labeled, “Legal Standards.” In this Chart, please list all state and federal statutes, regulations and provisos that apply to the agency (“Laws”). The other specifics are included in the template.

IV. Reports and Reviews

This section asks for information about reports the agency is required to submit to a legislative entity and the agency’s internal review process.

1. Please complete the **Agency Reporting Requirements Chart**. In the Excel document attached, there is a template to complete under the tab labeled, “Agency Reporting Requirements.” In this Chart, please list all reports, if any, the agency is required to make to a legislative entity. The specifics as to each report are included in the template.
2. Please complete the **Internal Audit Chart**. In the Excel document attached, there is a template to complete under the tab labeled, “Internal Audits.”

RESTRUCTURING REPORT

V. Key Performance Measurement Processes

This category examines the agency's performance and improvement in key areas. Performance levels are examined relative to those of competitors and other organizations providing similar programs and services. Information is typically displayed by the use of performance measures. Quantitative measures may be supplemented by a discussion of qualitative measures where appropriate; however, every effort should be made to use appropriate quantitative measures that can be charted to show trends and comparisons to benchmarks.

Address only top-level results showing aggregate measures of agency-wide performance that are reflective of the value added to customers. Please include comparative data as applicable. These results are typically captured in performance goals and planning documents. When determining which processes are "key processes" consider the business impacts, and select those processes that are most important to the customer (both internal and external) to satisfy their requirements and/or those processes with problem areas identified by management.

Note: Results information (i.e., each chart, graph, table) reported for this category should be referenced to the specific question number (Ex. Chart 5.1-1, Graph 5.1-2, Table 5.1-3). The third digit identifies the sequential position of the specific chart, graph or table included in the agency's responses to each questions.

For each performance measurement included in response to the questions on the next page under Subsection A, please provide the following information:

- a. The performance goal(s)/benchmark(s) for the overall process output, and/or critical activities that produce the output.
 - i. Three agency/government entities in other states or non-government entities the agency considers the best in the country in this process or similar process and why.
 - ii. If the agency did not use results from an entity the agency listed in response to "i" as a performance goal/benchmark, why not and why did the agency choose the goal/benchmark it did?
 - iii. Individual(s) who are not employed by the agency (government or non-government, located anywhere in the country) whom the agency considers an expert in the process or similar process and their contact information, or if deceased, name of books authored.
- b. List the senior leaders who review the performance measure, their title and frequency with which they monitor it.
- c. Trends the agency has seen and the method by which it analyzes trends in these results.
- d. Whether the agency has reasonable control over this result (i.e., more than 50% or enough to be able to influence and accurately measure the result).
 - i. If the agency does not have reasonable control over this result, the other one or more agencies, who when combined with the agency, together have reasonable control over the result and names of those other agencies.

RESTRUCTURING REPORT

V. Key Performance Measurement Processes (cont.)

A. Results of Agency's Key Performance Measurements

Mission Effectiveness

1. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission effectiveness (i.e., a process characteristic indicating the degree to which the process output (work product) conforms to statutory requirements (i.e., is the agency doing the right things?))?

JEDA serves as the statewide conduit issuer of tax exempt bonds as allowed by Federal tax code. JEDA is unique in that it has the ability to issue all types of private activity bonds. Only three other states have a statewide conduit issuer with the broad authority of JEDA. These are Louisiana, Illinois and Massachusetts. Other states have agencies with limited authority to issue only health or educational bonds. Neighboring states do not have a statewide issuer similar to JEDA.

EXPERT REFERENCES:

TOBY RITTNER, President, CDFA (Council for Development Finance Agencies, 85 E. Gay Street, Columbus, OH 43215; Adjunct Professor, Ohio State University

**CHARLES SAMUELS, Attorney/Member, Mintz Levin Cohn Ferris Glovsky and Popeo
701 Pennsylvania Ave NW, Suite 900, Washington, D.C. 20004**

Mission Efficiency

2. What are the agency's actual performance levels for two to four of the agency's key performance measurements for mission efficiency (i.e., a process characteristic indicating the degree to which the process produces the required output at minimum resource cost (i.e., is the agency doing things right?)) including measures of cost containment, as appropriate?

JEDA receives no State funding and is totally self-supporting from its bond issuance fees. JEDA has only two employees and contracts out for most of the services it requires. It is truly an Enterprise Agency. The statewide authorities referenced in #1 above are much larger, have many more employees (15 for Illinois to 130 for Massachusetts) and much larger budgets.

Quality (Customer Satisfaction)

3. What are the agency's actual performance levels for two to four of the agency's key performance measurements for quality (i.e., degree to which a deliverable (product or service) meets customer requirements and expectations (a customer is defined as an actual or potential user of the agency's products or services)) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

JEDA was created to assist the State in job creation and economic development through the issuance of private activity tax exempt bonds. It provides a consistent, dependable, transparent and cost effective method for its customers. JEDA is the only conduit issuer available for non-health care nonprofit borrowers. Key stakeholders such as bond attorneys, underwriters, financial advisors, and bankers prefer using JEDA to meet their customers bond financing needs. There is also a national issuer, the Wisconsin Public Finance Authority, which is able to issue bonds in all states. They are not a threat to JEDA's core business because of the efficiency and effectiveness of JEDA and its relationships with its borrowers.

Workforce Engagement

4. What are the agency's actual performance levels for two to four of the agency's key performance measurements for workforce engagement, satisfaction, retention and development of the agency's workforce, including leaders, for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

JEDA has only two employees who have been with the agency for five (executive assistant) and seven (executive director) years. These two employees interact with JEDA's customers and stakeholders on a daily basis and are directly tied to the success of the agency.

Operational/Work System Performance

1. What are the agency's actual performance levels for two to four of the agency's key performance measurements for operational efficiency and work system performance (includes measures related to the following: innovation and improvement results; improvements to cycle or wait times; supplier and partner performance; and results related to emergency drills or exercises) for the agency as a whole and for each program listed in the agency's Major Program Areas Chart?

The JEDA employees are constantly seeking ways to improve the effectiveness and efficiency of the agency to better serve its customers. The agency contracts many of its necessary services (office, computers, phones, etc.) with the Department of Commerce. Other services such as payroll, bookkeeping and marketing are contracted to outside vendors. This has proven to be very cost effective. JEDA is able to react quickly to changes in the marketplace due to its business- like approach to its mission.

RESTRUCTURING REPORT

V. Key Performance Measurement Processes (cont.)

B. Most Critical Performance Measures

1. Of the key performance measurement processes listed in Subsection A., which are the three most critical to achieving the overall mission of the agency?

Quality, Effectiveness and Efficiency are the critical components for JEDA to meets its mission of job creation and economic development across the State.

C. Databases/Document Management

1. List all electronic databases/document management/business intelligence systems or programs utilized by the agency, including, but not limited to all relational database management systems.

JEDA contracts its telephone and computer services to the Department of Commerce. Bookkeeping is contracted to an outside bookkeeper using Quickbooks. Payroll is processed by a national payroll service, ADP. Web design services are contracted to an outside vendor.

D. Recommended Restructuring

Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report ("Process").

1. Yes or No, based on the information obtained and analysis performed during the Process, does the agency have any recommendations for restructuring (either that it could do internally or that would need the assistance of revised or new legislation) that would merge or eliminate duplicative or unnecessary divisions, programs, or personnel within each department of the agency to provide a more efficient administration of government services? **NO**
 - a. If yes, please provide the agency's suggestions.

SEVEN-YEAR PLAN

VI. Seven-Year Plan

A. General

1. Yes or No, does the agency have a plan that provides initiatives and/or planned actions the agency will take during the next seven fiscal years that implement cost savings and increased efficiencies of services and responsibilities in order to continually improve its ability to respond to the needs of the state's citizens? **NO**
If yes, go to Current/Recommended Actions Section.
If no, skip Current/Recommended Actions Section and go to Additional Questions.

B. Current/Recommended Actions

1. Describe all of the actions the agency is currently taking and plans it has for initiatives and actions during the next seven fiscal years to work to achieve greater efficiency in its operations in order to continually improve its ability to respond to the needs of the state's citizens? In this description, provide the names of all personnel who are responsible for overseeing the actions and plans.

The executive director and executive assistant, at the direction of the JEDA Board of Directors, constantly strive to adapt to changes in the marketplace. JEDA's bond issuance activities reflect the needs of the market and are governed by federal tax law. Its current operations require no state funding and its bonds are issued with no liability to the State. There are not actions required at this time.

2. What are the anticipated cost savings and/or efficiencies that would be achieved by each action? **NOT APPLICABLE**
3. Is legislative action required to allow the department/agency to implement the current or recommended actions? **NOT APPLICABLE**
4. If legislative action is required, please explain the constitutional, statutory or regulatory changes needed. **NOT APPLICABLE**
5. Describe the agency actions that will be implemented to generate the desired outcomes for each recommendation.
6. What is the timeline for implementation of the change and realization of the anticipated benefits for each recommended action/change?

Now go to Additional Questions.

SEVEN-YEAR PLAN

VI. Seven-Year Plan (cont.)

C. Additional Questions

1. What top three strategic objectives of the agency will have the biggest impact on the agency's effectiveness in accomplishing its mission?
2. What are the fundamentals required to accomplish the objectives?
3. What links on the agency website, if any, would the agency like listed in the report so the public can find more information about the agency?
4. Is there any additional information the agency would like to provide the Committee or public?
5. Consider the process taken to review the agency's divisions, programs and personnel to obtain the information contained in response to all the previous questions in the Restructuring Report and Seven-Year Plan ("Process"). State the total amount of time taken to do the following:
 - a. Complete the Process
 - b. Complete this Report
6. Please complete the **Personnel Involved Chart**. In the Excel document attached, there is a template to complete under the tab labeled, "Personnel Involved." Please list the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in the Restructuring and Seven-Year Plan Report and their title and their specific role in answering the question (i.e., searched the agency documents, asked for information because they are in charge of the department, etc.).

CHARTS APPENDIX

VII. *Excel Charts*

Please send an electronic copy of the entire Excel Workbook and print hard copies of each of the Charts to attach here. Please print the charts in a format so that all the columns fit on one page. Please insert the page number each chart begins on below.

Similar Information Requested Chart _____	1
Historical Perspective Chart _____	2
Purpose, Mission Chart _____	3
Key Products Chart _____	5
Key Customers Chart _____	6
Key Stakeholders Chart _____	7
Key Partner Agency Chart _____	4
Overseeing Body Chart (General and Individual Member) _____	8 & 9
Major Program Areas Chart _____	10
Legal Standards Chart _____	11
Agency Reporting Requirements Chart _____	12
Internal Audits Chart _____	13
Personnel Involved Chart _____	14

Does the agency already provide the information requested on this page, or similar information, in a report required by another entity? If yes, add the appropriate information to the **Similar Information Requested Chart**. If the agency looks in the Excel document attached, there is a template for the agency to complete for any questions which ask for the same information under the tab labeled, "Similar Info Requested."

Similar Information Requested Chart

INSTRUCTIONS: Please provide details about other reports which investigate the information requested in the Restructuring Report. This information is sought in an effort to avoid duplication in the future. In the columns below, please list the question number in this report, name of the other report in which the same or similar information is requested, section of the other report in which the information is requested, name of the entity that requests the other report and frequency the other report is required. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Restructuring Report Question #	Name of Other Report	Section of Other Report	Entity Requesting Report	Freq. Other Report is Required
South Carolina Jobs-Economic Development Authority	Legal Standards	Senate Oversight Report	Agency Information	Office of Senate Oversight	Submitted Jan. 2015
South Carolina Jobs-Economic Development Authority	Major Program Areas, Key Stakeholders, Key Customers, Key Deliverables, Purpose Mission Vision	Accountability Report	see Column B	Budget & Control Board	Annually- Sept.

Historical Perspective Chart

INSTRUCTIONS: Please provide information about any restructuring or major changes in the agency's purpose or mission **during the last ten years**. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Year	Description of Restructuring that Occurred	Description of Major Change in Agency's Purpose or Mission
South Carolina Jobs-Economic Development Authority	Not Applicable	Not Applicable	Not Applicable

INSTRUCTIONS: Provide information about the date the agency, in its current form, was initially created and the present purpose, mission and vision of the agency, with the date each were established in paranethesis. The Legal Standards Cross Reference column should link the purpose, mission and vision to the statutes, regulations and provisos listed in the Legal Standards Chart, which they satisfy.

Agency Submitting Report	Date Agency created	Purpose	Mission	Vision	Legal Standards Cross References
South Carolina Jobs-Economic Development Authority	6/15/1983	Promote and develop the business and economic welfare of the State to provide maximum opportunities for creation and retention of jobs and improvement of standard of living.	Job creation, job retention, and economic development through statewide conduit issuance of bonds to nonprofits, small manufacturers and solid waste facilities by allowing for money saving by borrowing at lower tax-exempt interest rates	Expansion of marketing to reach more manufacturing entities; continue educational efforts professionals involved in public finance and conduit bond issues; expand client base through taxable bond program; attract commercial lenders to private placement of tax-exempt bonds; market bond program to economic developers throughout State	Purpose: 41-43 Mission: 41-43 Vision: 41-43

Key Partner Agencies Chart

INSTRUCTIONS: List the names of the other state agencies which have the biggest impact on the agency's mission success (list a minimum of three); partnership arrangements established and performance measures routinely reviewed with the other entity. The Major Program Areas Cross References Column should link the Partner Agency to the major program area, in the Major Program Areas Chart, on which it has the biggest impact. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable and a minimum of three.

Agency Submitting Report	Agency w/ Impact on Mission Success	Partnership Arrangement Established	Performance Measures Routinely Reviewed Together	Major Program Areas Cross Reference
South Carolina Jobs-Economic Development Authority	N/A	N/A		

INSTRUCTIONS: Provide information about the agency's key deliverables (i.e. products or services); primary methods by which these are delivered; and, as applicable, actions that may reduce the general public and/or other agencies initial or repeatitive need for the deliverable. List each deliverable on a separate line. If there are multiple ways in which the deliverable is provided, list the deliverable multiple times with each delivery method on a separate line. In the "Three Greatest" column, indicate and rank the three most significant deliverables the agency brings to the people of South Carolina with #1 being the most significant. For the deliverables which are not one of three most significant, do not put anything in this column. The Major Program Areas Cross References Column should links the deliverable to the major program area, in the Major Program Areas Chart, within which that product or service is provided. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Deliverable (i.e. product or service)	Three Most Significant (#1, #2, #3)	Primary Method of Delivery	What can be done to reduce the general public and/or other agencies initial need for this deliverable? (i.e. preventive measures before the citizen or agency needs to come to the agency)	What can be done to reduce the general public and/or other agencies need to return for this deliverable? (i.e. preventive measures to ensure they do not need to come back to the agency for this service or product after already receiving it once).	If deliverable is identified as one of the three most significant, what would allow the agency to focus on it more?	Major Program Areas Cross Reference
South Carolina Jobs-Economic Development Authority	1	Conduit Bond Issuance	#1	Bond issue to finance qualifying projects	N/A - JEDA is statewide conduit bond issuer	N/A - JEDA is statewide conduit bond issuer	N/A	

Key Customers Chart

INSTRUCTIONS: Provide information about the key customer segments identified by the agency and each segment's key requirements/expectations. A customer is defined as an actual or potential user of the agency's deliverables. Please be as specific as possible in describing the separate customer segments (i.e. do not simply put "public.") The Deliverables Cross References column should link customer groups to the deliverable listed in the Key Deliverables Chart, which they utilize. **NOTE:** Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Customer Segments	Requirements/Expecations	Deliverables Cross References
South Carolina Jobs-Economic Development Authority	1	Non-Profit organizations- 501c-3 organizations, including private schools, educational foundations, museums, YMCAs	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	2	Hospitals, nursing home and assisted living facilities, retirement homes, hospice facilities	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	3	Small manufacturing facilities	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	4	Solid Waste Disposal Facilities	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1

INSTRUCTIONS: Provide information about the agency's key stakeholder groups and their key requirements and expectations. A stakeholder is defined as a person, group or organization that has interest or concern in an agency. Stakeholders can affect or be affected by the agency's actions, objectives and policies. Please be as specific as possible in describing the separate stakeholder groups (i.e. please do not simply put "the public.") The Deliverables Cross References column should link stakeholder groups to the deliverable, listed in the Key Deliverables Chart, for which they group has the most interest or concern. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Stakeholder Group	Requirements/Expectations	Deliverables Cross References
South Carolina Jobs-Economic Development Authority	1	Capital Markets	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	2	National, Regional and State Banking Sector	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	3	Department of Treasury	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	4	Local and State elected officials	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	5	Underwriters	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	6	Borrowers	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	7	Bond Attorney	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1
South Carolina Jobs-Economic Development Authority	8	Financial Advisors	Transparent, dependable and cost effective process to meet financing needs of borrowers	#1

INSTRUCTIONS: Provide information about the body that oversees the agency and to whom the agency head reports including what the overseeing body is (i.e. board, commission, etc.); total number of individuals on the body; whether the individuals are elected or appointed; who elects or appoints the individuals; the length of term for each individual; whether there are any limitations on the total number of terms an individual can serve; whether there are any limitations on the number of consecutive terms an individual can serve; and any other requirements or nuisances about the body which the agency believes is relevant to understanding how the agency performs and its results.

Agency Submitting Report	Type of Body (i.e. Board, Commission, etc.)	# of Times per Year Body Meets	Total # of Individuals on the Body	Are Individuals Elected or Appointed?	Who Elects or Appoints?	Length of Term	Limitations on Total Number of Terms	Limitations on Consecutive Number of Terms	Challenges imposed or that Agency staff and the Body have faced based on the structure of the overseeing body	Other Pertinent Information
South Carolina Jobs-Economic Development Authority	Board	Minimum 4 per year - Up to max 12	10	Appointed	Governor	3 yrs	N/A	N/A	None	N/A

Overseeing Body - Individual Members Chart

INSTRUCTIONS: Provide information about the individual members on the body that oversees the agency including their name, contact information, length of time on the body, profession and whether they are a Senator or House Member. The Major Program Areas Cross References Column should link the individual to the major program area, in the Major Program Areas Chart, in which the individual has a particular influence, if any, by way of serving on a subcommittee within the body, task force, etc. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name of Individual on Body	Contact Information	Profession	Date First Started Serving on the Body	Last Date Served on the Body	Length of Time on the Body (in years)	Senator or House Member? (put Senate or House)	Major Program Areas Cross Reference
South Carolina Jobs-Economic Development Authority (JEDA)	Michael W. Nix	mnix@dacapitalsc.com	Investment Director	3/21/2013	Current Chairman	2	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Gregory A. Thompson	gthompson@thompsonind.com	Pres/CEO Construction Co.	4/17/2013	Current Director	2	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Henry M. Swink	hswink@mccallfarms.com	President - Canning Co.	5/8/2013	Current Director	2	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Curtis B. Carter	curtis.carter@southstatebank.com	Banker	3/27/2014	Current Director	1	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Stephen H. Mudge	steve.mudge@serrus.com	Pres/CEO Venture Capital	4/17/2014	Current Director	1	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	William R. Drake	bucky@drakedevelopment.com	Real Estate Developer	11/7/2014	Current Director	1/2	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	William W. Peacock	wpeacock@newriverautomall.com	Pres/CEO Auto Dealership	12/23/2014	Current Director	1/4	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Robert M. Hitt, III	bhitt@sccommerce.com	Secretary of Commerce	11/19/2011	Current Ex-Officio Director	3.5	N/A	
South Carolina Jobs-Economic Development Authority (JEDA)	Felton A. Lowrey	feltonlowrey@gmail.com	Retired Banker	12/30/2013	Current Ex-Officio Director	1.5	N/A	

INSTRUCTIONS: Provide information about the agency's Major Program Areas as those are defined in the Appropriations Act. When completing columns B - K, the agency can copy and paste the information the agency submitted in the Program Template of the FY 2013-14 Accountability Report, just make sure of the following:

a) List only the programs that comprise at least 80% of the total budget and include the % of total budget. The remainder of the programs should be "listed ONLY" in the box labeled "Remainder of Programs", with those program expenditures detailed in the box labeled "Remainder of Expenditures." If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11.

b) The "Associated Objective(s)" column in the Program Template of the FY 2-13-14 Accountability report has been changed to "Key Performance Measures Cross References." The Key Performance Measures Cross References column should link major programs to charts/graphs in the Key Performance Measurement Processes Section (ex. Chart 5.2-1 or Graph 5.2-2). If the agency has trouble understanding what is requested, refer to the 2012-13 Accountability Report, Section II, number 11; and

c) An additional column, titled "Legal Standards Cross References," has been added at the end. The Legal Standards Cross Reference column should link major programs to the statutes, regulations and provisos listed in the Laws Section of this report, which they satisfy.

Included below is an example, with a partial list of past Major Program Areas from the Department of Transportation. The example does not include information in the columns under expenditures, key performance measures cross reference, legal standards cross references or remainder of expenditures, however the agency must complete these columns when submitting this chart in final form. Please delete the example information before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Note:
-Key Performance Measures Cross References Column links major programs to the charts/graphs in the Key Performance Measurement Processes Section of the Restructuring Report.
-Legal Standards Cross References Column links major programs to the statutes, regulations and provisos they satisfy which are listed in the Laws Section of the Restructuring Report.

Agency Submitting Report	Program/Title	Purpose	FY 2012-13 Expenditures				FY 2013-14 Expenditures				Key Performance Measures Cross Reference	Legal Standards Cross References
			General	Other	Federal	TOTAL	General	Other	Federal	TOTAL		
South Carolina Jobs-Economic Development Authority	ADMINISTRATION	Leadership and direction of agency - Executive Director		\$110,000		\$110,000		\$110,000		\$110,000	10114	41-43
			% of Total Budget:	24% % of Total Budget:	% of Total Budget:	24% % of Total Budget:	% of Total Budget:	26% % of Total Budget:	% of Total Budget:	26% % of Total Budget:		
South Carolina Jobs-Economic Development Authority	ADMINISTRATION	Other Personnel		\$50,000		\$50,000		\$60,000		\$60,000	10170	41-43
			% of Total Budget:	11% % of Total Budget:	% of Total Budget:	11% % of Total Budget:	% of Total Budget:	14% % of Total Budget:	% of Total Budget:	14% % of Total Budget:		
South Carolina Jobs-Economic Development Authority	ADMINISTRATION	Other Operating Expense		\$182,000	\$66,000	\$248,500		\$182,500	\$18,000	\$200,500	21201	41-43
			% of Total Budget:	39% % of Total Budget:	15% % of Total Budget:	54% % of Total Budget:	% of Total Budget:	43% % of Total Budget:	4% % of Total Budget:	47% % of Total Budget:		

Remainder of Programs: List any programs not included above and show the remainder of expenditures by source of funds.

5050000 Land and Buildings
3000000 Toll Operations

	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget	% of Total Budget
81300- Employer Contributions		\$52,650 11%		\$52,650 11%		\$52,650 12%	\$52,650 12%

INSTRUCTIONS: List all state and federal statutes, regulations and provisos that apply to the agency ("Laws") and a summary of the statutory requirement and/or authority granted in the particular Law listed. Included below is an example, with a partial list of Laws which apply to the Department of Juvenile Justice and Department of Transportation. The agency will see that a statute should be listed again on a separate line for each year there was an amendment to it. Please delete the example information before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Statute/Regulation/Provisos	State or Federal	Summary of Statutory Requirement and/or Authority Granted
South Carolina Jobs-Economic Development Authority (JEDA)	1	41-43	State	Establishes the South Carolina Jobs-Economic Development Authority, a public body corporate and policy and an agency of the State, with the responsibility of serving as statewide conduit issuer of bonds private activity bonds.
JEDA	2	IRS Code Section 142	Federal	Establishes Exempt Facility Bond rules and criteria
JEDA	3	IRS Code Section 144	Federal	Establishes Qualified Small Issue Bond rules and criteria
JEDA	4	IRS Code Section 1394	Federal	Establishes Basis prescribed in the Revenue Act of 1934

INSTRUCTIONS: List all reports, if any, the agency is required to submit to a legislative entity. Beside each include the following under the appropriate column: a) Name of the report; b) Legislative entity that requires the report; c) Law(s) that require the agency to provide the report; d) Stated legislative intent (from legislative entity, statute, regulation or other source) in providing the report; e) Frequency with which the report is required (i.e. annually, monthly, etc.); f) Approximate year the agency first started providing the report; g) Approximate cost to complete the report and any positive results from completing and submitting the report; and h) Method by which the agency receives, completes and submits the report (i.e. receive via emailed word document; log into or open program, enter data and click submit; etc.). Included below are examples of reports the agency may have to submit. The example does not include information in the columns under # of staff needed to complete the report; approx. total amount of time to complete the report and approx. total cost to complete the report, however the agency must complete these columns when submitting this chart in final form. Please delete the example figures before submitting this chart in final form, unless it applies to the agency, in which case ensure the information about those reports is complete. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Item #	Report Name	Legislative Entity Requesting Report	Law Requiring Report	Stated Intent of Report	Year First Required to Complete Report	Reporting Freq.	# of Days in which to Complete Report	Month Report Template is Received by Agency	Month Agency is Required to Submit the Report	Cost to Complete Report			Positive Results of Reporting	Method in which Report Template is Sent to Agency (i.e. via email;	Format in which Report Template is Sent to Agency	Method in which Agency Submits Completed Report (i.e. email; mail; click submit on web based form;	Format in which Agency Submits Completed Report (word, excel, etc.)
											# of Staff Members Needed to Complete Report	Approx. Total Amount of time to Complete Report	Approx. total Cost to Agency to Complete (considering staff time,					
South Carolina Jobs-Economic Development Authority	1	Restructuring Report	House Legislative Oversight Committee	1-30-10(G)(1)	Increased Efficiency	2015	Annually	30	February	March	2	40 hrs	\$6,000	TBD	Email	Word and Excel	Email and Hardcopy	Word and Excel
South Carolina Jobs-Economic Development Authority	2	Accountability Report	Executive Budget Office	Various perm. & temporary law(no reference provided)	Provide Governor and Gen. Assembly information to support analysis of the Budget		Annually	53	July	Sept.	2	30 hrs	\$4,500	N/A	Email	Word and Excel	Email and Hardcopy	Word and Excel
South Carolina Jobs-Economic Development Authority	3	Bank Account Transparency & Accountability Report	Budget & Control Board	Proviso 117.88 (changes annually)	Promote Accountability and Transparency of composite reservoir bank accounts		Annually	29	Sept	Oct	2	15 hrs	\$2,250	N/A	Email	Excel	Email and Hardcopy	Excel

INSTRUCTIONS: Identify the agency's internal audit system and policies during the past five fiscal years including the date the agency first started performing audits; individuals responsible for hiring the internal auditors; individuals to whom internal auditors report; the head internal auditor; general subject matters audited; the individual or body that makes decision of when internal audits are conducted; information considered when determining whether to conduct an internal audit; total number of audits performed in the last five fiscal years; # of months it took for shortest audit; # of months for longest audit; average number of months to complete an internal audit; and date of the most recent Peer Review of Self-Assessment by SC State Internal Auditors Association or other entity (if other entity, name of that entity).

Note: All audits are not the result of suspicious activity or alleged improper actions. Often times regular audits are required by statute regulation or an agency's standard operating procedure simply as a method of ensuring operations are staying on track.

Agency Submitting Report	Does agency have internal auditors? Y/N	Date Internal Audits Began	Individuals responsible for hiring internal auditors	Individuals to whom internal auditors report	Name and contact information for head Internal Auditor	General subject matters audited	Who makes decision of when an internal audit is conducted	Information considered when determining whether to conduct an internal audit	Do internal auditors conduct an agency wide risk assessment routinely? Y/N	Do internal auditors routinely evaluate the agency's performance measurement and improvement systems? Y/N	Total Number of Audits performed in last five fiscal years	# of months for shortest audit	# of months for longest audit	Avg. # of months needed to conduct audit	Date of most recent Peer Review of Self-Assessment by SC SIAA or other entity (if other entity, name of that entity)
South Carolina Jobs-Economic Development Authority	Y		State Auditor's Office awards contract	Richard Gilbert, Jr. Deputy State Auditor	Matt A. Brown, CPA Brown CPA, LLC	Financial Statements, accounting policies, internal controls	State Auditor - contained in engagement award letter	Based on end of Authority's fiscal year - June 30	Y	Y	5				

INSTRUCTIONS: List the name of all personnel at the agency who were consulted or performed work to obtain the information utilized when answering the questions in these reports, their title and their specific role in answering the question (i.e. searched the agency documents, asked for information because they are in charge of the department, etc.) Please delete the example information and instructions row before submitting this chart in final form. NOTE: Responses are not limited to the number of rows below that have borders around them, please list all that are applicable.

Agency Submitting Report	Name	Phone	Email	Department/Division	Title	Question	Role in Answering Question
South Carolina Jobs-Economic Development Authority	Harry A. Huntley	803-737-0627	hhuntley@scjeda.com	Administration	Executive Director	All	Review instructions; review, revise and/or edit responses as appropriate
South Carolina Jobs-Economic Development Authority	Claudia Miller	803-737-0284	cmiller@scjeda.com	Administration	Executive Assistant	All	Review Instructions/review agency documents/prepare draft responses