**WorkforceGPS**

**Transcript of Webinar**

**Senior Community Service Employment Program (SCSEP)**

**National Grantee Orientation, Day 1**

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MICHI MCNEACE: Good afternoon, everyone. And again, welcome to today's webinar, "National Grantee Orientation." As Gary mentioned, my name is Michi McNeace and I'll be the other moderator for today's session.

And to make this webinar a little bit more engaging, we'll be providing an opportunity and opening up for questions and answer after each module, which will provide you the opportunity to ask any questions or submit your questions to the presenter via the chat room.

As stated earlier, we will be addressing basically – I kind of – sorry. I love my position, but what I'm trying to say is that when we open up the webinar for questions and answer we'll have two options. You can do that verbally and then you can also submit that through the chat session.

So today's objectives. We're going to do some introductions. We're going to cover SCSEP histories and overview. We're going to hear from our grant office. And then we're going to cover a little bit about financial management and SCSEP the program as a whole. And then we're going to talk about communications and next steps.

We have a whole agenda today and I believe we have about three hours slated. And understanding that three hours is a long time to sit in front of your computer screen, so at any point in time, please, if you feel the need to push away from the computer and stretch your legs, please do so. As Gary mentioned earlier, the webinar is being recorded and will be posted on our CoP in a few days.

For those who don't know, the national office is located at 200 Constitution in Washington, D.C., at the Francis Perkins Building. SCSEP is one of several competitive discretionary grants housed within the Division of National Programs, Tools, and Technical Assistance. The division is managed by the division director, Mr. Steven Rietzke. I would now like to go ahead and introduce Mr. Rietzke and have him kick off our webinar.

STEVEN RIETZKE: All right. Thank you, Michi. You know, I have to say, the Francis Perkins Building is not exactly the most handsome building on Constitution Avenue. But I would assure you that the inhabitants of this building have much more interesting personalities than the building does, especially this team here.

So I just want to kick everything off and say welcome to you all. First, I really want to congratulate all of you who have been newly awarded as SCSEP grantees, as well as congratulate the folks who are returning SCSEP grantees. We're glad to have you back and we're glad to have the new folks on board. And we're also glad that we have some states and territories with us today as well.

For the national grantees in particular, I know we've been talking to you a lot lately – probably some one-on-one attention as well as some webinars and other kind of training events – because we're really focused on the details of the transition activities that you all are engaged in now.

Today we're glad to have a chance to be a little more general in the material that we're covering. And we're glad that you're sticking with us and appreciate that we're trying to get you to absorb a lot of information quickly. I think a lot of you have probably had lots of SCSEP experience already. Some of you may be relatively new to the program. But I think both of those cohorts can get some value out of today. It's a good refresher for folks who've already got experience and a good introduction to folks who are just coming on board.

Really, our goal is to really approach the program in a collaborative way, to move forward and make sure that SCSEP participants continue to receive services and that the program functions as well as it can possibly function. This orientation is really designed to provide each of you with the fundamentals that govern the program and try to cover kind of the basics of what you need to know as a SCSEP grantee.

Just by way of a little bit of background – I think you all know this already, but just to kind of hit some of the high points, as you know, the SCSEP – the Senior Community Service Employment Program is authorized under Title V of the Older Americans Act of 1965, which was recently amended in 2016.

The program provides services to low-income adults, 55 years of age and older, in every state and territory. And the program is administered through a combination of non-profit organizations, state and territory government entities. And it's – the program is somewhat unique in that it encompasses both employment and community service components.

The Department of Labor has managed SCSEP since the 1960s and we're very proud that we – and you all, really, as grantees – have transformed the lives of thousands of low-income seniors through the country, by giving them opportunities to earn a wage while learning new employable skills, and updating some of their existing skills. We really think that the program provides an avenue for older adults to contribute resources to their community and we think that that's a great mission.

So I think we really realize that your job as SCSEP grantees is not easy. There's a lot of requirements that you have to keep track of, a lot of reporting that you have to do, and a lot to consider as you operate your programs. And we here at the Department of Labor really depend on each of you and your expertise and your commitment to make sure that the program is successful.

And we're here in the national office to support that mission. And we collaborate closely with our colleagues in the Office of Grants Management, as well as our colleagues out in the regional offices, as where your federal project officers sit.

So just to talk a little bit about our division, which is where the, quote/unquote, "program office" for SCSEP sits, we call ourselves the NaPTTA for short, but I don't think that acronym means much to anybody outside of this building. But that's the Division of National Programs, Tools, and Technical Assistance. And we sit within the Office of Workforce Investment in the Employment and Training Administration.

And when you look at the mission of the Office of Workforce Investment and kind of our division's place in supporting that mission, what we're really trying to do overall is to help the nationwide workforce system function more effectively and more efficiently.

And part of that is really being supportive of and trying to help jobseekers, employers, training providers, and other constituencies better understand the labor market, better understand skill requirements, education and training requirements, credential requirements, and kind of what's needed to work in particular occupations and industries.

And our division has a fairly broad portfolio supporting that mission. We have a unit that's focused on supporting labor market information, tools and infrastructure. So if you've heard of O\*NET – the Occupational Information Network – Career One-Stop website, and workforce information grants that go to state labor market information offices.

We have another unit that's focused on technical assistance strategy and delivery. That unit manages our Workforce GPS website, as well as coordinates technical assistance across the Office of Workforce Investment. And so those two units are really kind of cross-cutting areas for ETA.

And then we have two more units, one of which is focused on some specialty national programs, like the National Farmworker Jobs program, the Farmworker Monitor Advocate System, and the Disability Employment Initiative; and finally, last but not least, the Older Workers Unit that manages the SCSEP program.

So that kind of gives you a snapshot of where we sit in the national office here.

And so to talk a little bit about the Older Workers Unit, these are the folks who are basically all sitting in the room around the phone with me today. And their job is to manage and oversee the grants and investments for the SCSEP program.

They run – they develop and manage the national grant funding opportunity announcements. They provide support for regional federal project officers in managing the SCSEP grants. This unit oversees the national reporting system, the SPARQ system; and reviews program and performance data to look at continuous improvement.

And then these folks also develop and promote system-wide capacity for delivery of service to older workers through things like technical assistance and other efforts, like we're doing here today.

So going on to the next slide, a little bit about the program office. I touched on some of this already. I think I can probably run into the next slide where it gives a little more detail on each of these functional areas.

So as I mentioned, one of the things that we do is support federal project officers out in the field in our regional offices. And I should say, they support us as well. I think we have a strong relationship with the FPOs and we try to coordinate closely on issues that affect grantees. And some of those things are looking at the grant submission packages and reviewing those, looking at grant modifications; and also, obviously, technical assistance and training, like we're doing here.

Sometimes we do webinars and more formal events like this. A lot of times we're doing technical assistance and training through more informal conversations, sometimes site visits if it's helpful to kind of get into more detail in person. Our travel funds are not unlimited, but we do get occasion to do site visits sometimes and we always appreciate doing that.

And then we also work with some contract teams in providing technical assistance, which you'll hear about a little bit more as we get into this webinar. But BCT Partners and PM Solutions are two of our key contractors on the SCSEP team, and particularly in helping us provide technical assistance and training.

And then moving on to the next slide, the SCSEP unit also looks at managing, collecting, negotiating performance and keeps tabs on performance data, as well as guidance material. So data collection and validation handbooks, the quarterly performance reporting handbook, managing customer satisfaction surveys, goal negotiation, things like that.

And then finally, policy guidance. The national program office is where we kind of have the coordinating role and the developing role on policy guidance. And that can range anywhere from federal regulations, which we're kind of ramping up now to address the new requirements of the amended Older Americans Act. As I mentioned before, we work on funding opportunity announcements. And then training and employment guidance letters, training and employment notices.

So that's kind of a quick punch list of the things that the Older Works Unit and our overall division is focused on.

Just by way of quick introductions, I'll introduce you to some of the key folks on our SCSEP team here. LaMia Chapman is the unit chief for the Older Workers Unit. LaMia has a lot of experience at the local level in a job center, as well as some experience in our Division of Youth Services here. And she's been in this position for, what, about a year?

LAMIA CHAPMAN: Yes.

MR. RIETZKE: And I should say, I've only been in my position since about February. But I've been at ETA for about a decade and spent a number of years as a grant officer. And Jimmie Curtis is in the room here; you'll hear from him in a little bit.

But moving on to the rest of the SCSEP team. Irene Jefferson is a workforce analyst on the team, and I imagine that the vast majority of you know Irene.

Judith Gilbert. Judith actually liked SCSEP so much that she came out of retirement and is working for us part-time. And it's really a big year for SCSEP because it's a competition year and it's also a year in which we're working on regulations and information collection related to the update law. And so with all that going on, we thought it would be valuable to have Judith's depth of experience on the program; and lucky for us, she agreed. So she's here as well.

And then a couple more folks on the team. Simi Atolagbe is another workforce analyst. She works a lot on the SPARQ system and other issues related to that. And she's the national office liaison for regions two and four.

And I apologize. I missed my note here that I should have mentioned Irene is the national office liaison for regions one and five. LaMia has the team set up so that members of the team have particular focus on certain regions. And that's really sort of the grantees and the FPOs in those regions have kind of a specific go-to person to work through issues and ask questions of.

And then Susanna Troxler is a presidential management fellow who is in our office. She's the national office liaison for regions three and six.

And then to introduce you to some of the folks on our contract team. Michi McNeace, who you heard from at the outset, is with PM Solutions. And she and Dawn Mitchell, also with PM Solutions, really work in coordination with us in the national office, as well as the FPOs, and do a lot of comprehensive training and technical assistance, support the program in a lot of ways, as well as – including performance and data technical support and management.

Ted Romero, also with PM Solutions. He helps us to coordinate technical assistance and training. And Bennett Pudlin, who I'm sure the vast majority of you know as well, with BCT Partners, supporting a lot of things related to the SPARQ system, performance, things like that.

And then Terry Cram, also with BCT Partners; and Baron Hilliard with BCT Partners.

I hope that the next time we have a SCSEP competition we have super fancy videoconferencing systems and we'll all be waving and smiling at you from a high-resolution screen. But Gary's saying we do have that now, but we're – (laughter) – we're keeping it simpler here and just doing this over the phone.

I think – we wish that we could do this in person, is really what I'm trying to say. But given limited travel funds and time and resources, this is the next best thing. So I do encourage you throughout this presentation to make use of the interactivity and ask questions and type things and chime in over the phone when it's appropriate.

So again, I just want to thank you all for joining today and I think it's going to be a good presentation. So before I kick it over to LaMia, here's a quick poll for you to do.

The question is, "Have you interacted with any member of the SCSEP team?" And if you haven't, you've done a pretty good job hiding from them. (Probably time to call you ?) So number one, I think so. Number two, I definitely have. Number three, nope, this is the first time I've even heard of them. And number four, who are they again?

Getting a lot of "I definitely have," so that's good.

Great. Well, thank you all. And I'm going to turn it over to LaMia.

MS. CHAPMAN: Thank you. And welcome, SCSEP grantees. First, I'd like to thank Steve for opening up our NGO, and the team for all the hard work they have in putting toward this event and the other events – the transition webinars that we've had. So thank you. Thank you, all.

As Steve's mentioned, we're all here together for the same goal, and that is to work collaboratively to ensure that our program continues to provide self-sufficiency and employment opportunities for older adults, and to provide optimal customer service to our SCSEP participants and to their overall success.

SCSEP history and overview. Steve had touched on the authorized Older American Act of 1965. And as some of you know, SCSEP continues to provide important employment and training opportunities for low-income seniors, to improve their employment outcomes, and to contribute to the overall enrichment of communities across the nation.

SCSEP provides various community service assignments and job training opportunities at non-profit and public facilities, including day care centers, senior centers, school, hospitals, that reflect the community needs.

Over the years, SCSEP has enhanced their services to participants by providing occupational, work skills and aptitude assessments, skills development and other job training opportunities, and employment assistance through the American Job Centers.

The program grants are awarded to eligible applicants, which includes states, U.S. territories, and public and private non-profit entities other than political parties. A relative amount of funding for each type of eligible applicant has historically occurred at proportions of 22 percent to state and territorial agencies and 75 percent to national grantees.

Grant overview. Twenty grants have been awarded to 19 national non-profit organizations through the program's general funds or funds set aside by statute to serve Native Americans and Asian-American and Pacific Islanders. On October 21st, DOL released the results of SCSEP for competition, announcing that there were 19 awardees, of which four are new and 15 remaining – 15 existing grantees.

These grants will support more than 34,000 positions. In addition, state and territorial grantees are awarded separately from this competition through a formula process and will provide services for an additional 10,000 positions.

As of that announcement, SCSEP began its transition. The SCSEP team has been working diligently to provide technical support and guidance to ensure a smooth transition. And more importantly, to make sure we do not lose focus as to why we are all here. And that is to continue to provide the much-needed services to our low-income seniors.

During this transition period, we will work with you. To date we have conducted two transition webinars – (audio break).

MS. MCNEACE: We left off at our poll that asks, "Do you know what the Office of Grant Management does?" And from the outcome of the poll, it looks like a good 90 percent of you do understand and know what the Office of Grant Management actually does. So that's a great segue.

We're now going to go ahead – I'm going to go ahead and introduce Mr. Jimmie Curtis, who's the grant officer with the Office of Grant Management.

JIMMIE CURTIS: Thank you, Michi. And so first, I just want to congratulate all of the grantees. The 2016 SCSEP competition was a pretty robust competition. And I think it goes without saying that we look forward to working with you all as you all successfully implement the program.

Now, one thing I do want to point out as well is – so as you all know, all of the awards have been executed and the majority of you all have your awards. Now, some of the emails that we sent out with the award packages bounced back to us with the note that essentially the emails that we sent out were too large. So my folks back in OGM are working right now to re-send those emails, but they're going to send them in a couple of different parts so that they break up the size of the files.

But the overall main majority of you all should have it. We sent them to the authorized reps as well as the points of contact. And often times we find that the SCSEP program director may not be the authorized rep or the point of contact. So please reach out to either of those two people that you all listed on your SF-424 and make sure that they forward you all the award email.

So one thing that was in that award email is the grantee orientation handbook. And essentially what it is, is it's something that's fairly new. It literally was just completed a couple of months ago – updated a couple months ago. But it's a great resource and it's designed to basically orient you all with the competitive grant process here at ETA.

Some of the major sections in that grantee orientation handbook, which I strongly, strongly recommend that you all review, is some of the sections are how you modify your grants. I'm going to go through the process of how you reach out to your FPO with the documentation that you must submit in order to request a modification. It talks about the grant close-out phase and what you need to do to be prepared for that. It gives you an overview on what the difference between obligations, which your award documents consist of. It talks about regulatory requirements.

And this is something that not only SCSEP grantees actually get, but every one of our programs that we actually execute grants for, we provide this to the grantees. So again, strongly, strongly recommend you all read that. It's not that detailed a read but it provides a lot of helpful information that'll save us all a lot of time later.

All right. Now, in terms of the program office and OGM and the relationship we have, I just want to specify that the grant office and the grant officer perform official grant duties, such as maintaining the official grant documents. So this is your no-cost extensions, your modifications, optional special requests, the letters that go out to you all approving those, some of the waiver requests you all have, things like that. Any equipment purchases on a per-unit basis of over $5,000, we have to approve those as well. You all need prior approval and that's something that's in your grant agreement.

I'm the grant officer, Jimmie Curtis. And then Jeannette Flowers on my team is the SCSEP specialist. So if you all have specific OGM – Office of Grants Management – questions, please send them directly to Jeannette with a copy to me. And you all actually should have her email because she's one of the people who actually sent out the email – the award emails.

So on to the next page.

So real quick recap of what the grant award package consists of. So basically, it's the notice of award, which is usually the page that has an electronic signature on it, which basically will have a date that corresponds with the date that we executed the award.

It'll also be a condition of award page. So every single one of the grants that we sent out has a condition of award page. Now, I've heard from a few grantees so far who have actually said that they're concerned about the turnaround time they have to submit the documentation we requested. So we said 30 days from the date of signature. Please just make every effort to get it in 30 days from the date of signature. But if you can't and it takes a couple days longer, we understand. We know that there's a lot that we're requesting.

Essentially what we're trying to get at is because everybody came in in their application and asked for specific counties and slots, more than likely you did not get 100 percent of exactly what you asked for. So what we're doing is we're saying to you all, please send in revised documentation that corresponds with what you actually got.

And in your package – your award package – you'll also see there's about a two-page document that details all the slots that you got, the counties that you got them in, as well as the states and everything like that. And you all have been talking with the SCSEP team here, so you all are probably very familiar with the entire transition process so far.

Also in the award package you have your grant terms and conditions. Again, just like with the grantee orientation handbook, I really recommend you all take the time to sit down and review those. I know that's something you all do anyway, but specifically in this case, again, it'll save a lot of time down the road. If questions do come up, you all might be able to answer some of those through the terms and conditions. But we're almost more than happy to hop on the phone with you all or exchange emails that help to clarify any questions you might have.

Your SF-424 that you submitted with your actual – and this is for the new grantees. The SF-424 that you submitted with your actual application, that should be in there; as well as your budget that you proposed, your budget narrative, the SF-424A.

Your statement of work is probably where the largest number of pages are. And that's one of the issues we're having with all the files bouncing back. We wanted to make sure that it wasn't just your project narrative, but all of the attachments you all sent in, your application, so that would be like your letters of commitment, other documents that are important and integral to the grant agreement. We have to make sure that they're included in the statement of work, so if later on down the line there are any issues that arise, we'll always be able to circle back to that document.

And then also your NICRAs – so your negotiated indirect cost rate agreement that you submitted with your application is a document that we also include in the grant award. If you've received an updated NICRA since you submitted your application several months ago, please make sure that you send that in as well, because we put a condition that that's "if applicable." So if it applies to you and you received and updated NICRA, please submit that when you send in the rest of the documents, your SF-424A, your budget narrative, and your SF-424.

All right. On to the next page. So the grant award letter officially acknowledges your respective award and it contains important information about the two systems that require a PIN.

We also included a welcome letter and attachment A that basically details what you all need to do in terms of transparency. It talks about how you get your HHS – which is Health and Human Services – payment management system account setup. It's very straightforward. It gives you the information right in it and it's very self-explanatory. So if you all have questions about that, please reach back out, but I – because a lot of you all have been doing SCSEP for a while, I think you're pretty familiar with it.

Additionally, I just wanted to talk about the 9130. If you have any questions related to 9130, please reach out to your FPOs; they'll help assist with that. I'm not going to go too much into the system just because I can't pull it up right here on the screen and show you all. And most of you all are already familiar with it anyway.

So what I will talk about, however, is the SCSEP reporting requirements. So this is something that's in your grant agreement. It's been in the grant agreement that we issued to SCSEP existing grantees for several years now.

You have two quarterly submissions; one is your 9130, the second is your quarterly narrative performance report. The unit here in the program office, as well as the FPOs, do read these reports. So please make sure – especially with the quarterly narrative performance report – that you have some sort of an agreement with your FPO as to what the format should be and all of the content that you all need to put in there. Please make sure that you submit that on a quarterly basis with all that content that you've agreed to your FPO with.

In terms of annual submissions, you have the TEGLs that come out every single year – the funding TEGLs – where it basically details what we need here in the national office to be able to provide SCSEP grantees with their PY – in this case it'll be PY17 funding. So usually that's an SF-424 and a 424A. It'll be a budget narrative. And please make sure on the budget narrative that you all include detailed explanations of every single cost category.

The program narrative, those instructions will actually be in the TEGL; it'll tell you what needs to be in the programmatic narrative – program narrative, I'm sorry. And then your programmatic assurances; that's something that you typically – pretty much the same document that you've all seen several years now. But you all have to sign that – basically sign that, saying that you're agreeing to the programmatic assurances.

And then special optional requests is something else that'll be in the TEGL. It'll talk about any waivers that you all want to apply for, what the process is for going to do that. But essentially, again, please justify, please make sure you explain, if you're asking for a waiver that you can clearly document why you all actually need the waiver. That'll save us a lot of time from having to actually go back and reach out to you all and ask for additional information.

All right. So the next slide, again, this is the project title you'll see in there. It'll say SCSEP terms and conditions. It'll have you all's identifying information. It'll also talk about the period of performance. It'll have the award amounts.

One thing – again, that two-pager that's in the project narrative is the first document you'll see in attachment B. It's the two-pager that details all the slots that you all have been awarded. Now, I know a couple people have asked me questions about in terms of swaps that have been done since the awards have been actually made. If there are any swaps that have been done between two grantees, we'll need to actually update that two-pager that I'm referring to because we want to make sure that the grant award is accurate from the time it's awarded all the way through until it actually is over.

So if you did actually – if you completed a swap with another grantee and it was approved by the national office, please make sure that you submit a modification request so that we can incorporate those changes to the participant slots that you were awarded. And essentially all we're going to do is just change that two-page sheet showing that these are the new slots you have versus what you had before.

The regulations and cost principles are there, as well as my signature as well. Now on to the next slide.

So just a quick overview of equipment purchases. So equipment purchases with a per-unit cost of more than $5,000 require prior approval. In order to bring about that – or in order to request that modification, please make sure that you, again, detailed justification as to what the equipment is that you're purchasing. We want to make sure that you submit that to your FPO for review and then your FPO will essentially send that to us.

One thing that we try to make sure that we avoid is that as we get closer to the end of the period of performance, that we don't submit equipment purchase requests two months, three months before the end of the period of performance. That specific information is in your grant award document as well. The process is your FPO reviews your equipment purchase and then submits it to the national office for review.

All right. So now, in terms of next steps or any major important reminders I would have is, please read the grantee orientation handbook. Please review your grant terms and conditions. Very crucial. You can reach out to your FPO. You can reach out to the national team here. You can reach out to OGM if you have questions, which I'm sure plenty of you all will.

And then again, you all received the documents on Thursday as well as this morning, where we basically say, please submit your redaction requests or any transparency materials within 14 days after receipt of your grant award. For some of the grantees that we're having issues with because the size of the files are too large, your 14 days starts when you actually receive it.

So that is pretty much it for me.

MS. MCNEACE: OK. Thank you, Jimmie. So now they're going to go ahead and open it up for questions and answers. Gary?

GARY GONZALEZ: Sure. So we have I think at least one question typed in, but we do want you to type in any other questions or comments that you might have.

If you're dialed in over the phone, I'm going to direct you to hit \*6 over your phone – on your phone's keypad, introduce yourself and then ask your question. So \*6 will unmute your line. Ask your question – or rather, introduce yourself and then ask your question and we'll try to answer for you.

If you're not comfortable with unmuting your line, or if you're listening through your computer speakers, please rely on that chat window at the bottom middle of your screen to type in any questions that you might have.

We do have I think one or two questions that have been typed in, which I think we should take first, and then turn to anybody that might be on the phone.

So I'm going to turn things over to Michi. Michi?

MS. MCNEACE: We do have a question where we just need to provide a quick explanation. The question is, "Will BCT or PM replace Charter Oak?" The answer is, definitely not. Bennett Pudlin, Charter Oak, is a key partner that is with BCT Partners. So Bennett's not going anywhere.

We have another question that came through, "When will transition funds be available?"

MS. : Well, I can tell you transition funds – we just sent out the email today talking about transition funds and with the instructions. You all have until November 23rd to get those documents back to us. And so if you have any questions after you read it and see it, please check with your FPO or talk with our SCSEP team here. Thank you.

MR. GONZALEZ: Thank you. So again, if you have any questions, please type them into the chat window. Or if you'd rather, please press \*6 on your phone's keypad, unmute your line, introduce yourself, and ask your question.

I'm not seeing anybody unmuting their line, but we do want to give you the opportunity to do so.

Q: Hi. This is Priscilla Edwards with the National Urban League. My question is, you mentioned about the need to submit a modification request as a result of swaps. If you do not have a change in your slot level, do you still need to do the modification request?

MR. CURTIS: Yes. So thank you for that question, Priscilla. So when you look in your grant agreement what you'll see is, like I said, that two-pager which actually details the exact slots you all got for every county and every state that you all got them for. What'll happen is, if you swapped, let's say, 30 slots in one county with another grantee for another 30 slots in another county, we want to make sure that document is accurate.

So yes, we would still need to do – you all would still need to submit a modification request. And in that request, you just want to detail this is what we gave up, this is the number of slots we gave up and this is the number of slots that we got from grantee XYZ. Again, it just goes to the accuracy of the grant documents.

MR. GONZALEZ: Thanks, Priscilla. Do we have anyone else that wants to jump in over the phone line? Again, press \*6 to unmute your phone.

MS. MCNEACE: We had a question earlier too. Well, it wasn't a question; it was basically a statement that said that one of the grantees noted that they would like to see pictures of the team. And I have to admit that we would like to have put up pictures, but unfortunately at this time we have a very shy SCSEP team who elected to stay incognito for just a little while longer. But we're working on it. We're working on it.

MR. GONZALEZ: All right. I do see one or two people typing into the chat, so I think we'll stay here for just another moment or two.

Realize this is not your only opportunity to ask questions. We will take questions throughout. So please, once we transition from this Q&A period back to the PowerPoint, please keep typing in your questions and we'll also come back to another Q&A period peppered throughout today's webinar.

I do see another question that has been submitted, so I'm going to toss it over to Jimmie. But the question reads, "Jimmie, will the state grantees have to submit modifications if they swap positions?"

MR. CURTIS: I would say yes on this one as well. Again, it just goes to the accuracy of the actual grant award documents. And I'll also say something as well. So if there's a swap where it's not an even swap – so if there's 30 slots that are going from grantee A to grantee B, but grantee B is only sending 25 back, that actually impacts the award amount. So that's definitely something that we would also do as a part of that modification.

But to answer your question, Matthew, yes. That'll be a modification request as well. We want to make sure the grant documents are accurate and we want to make sure that they show which slots are actually – which grantees have which slots.

MR. GONZALEZ: Thanks, Jimmie. So I'm not seeing any other questions being typed in. I do see maybe Matthew might be tacking onto your question or giving us a comment.

But I do again want to reiterate, we do want to hear from you. Please avail yourself of the opportunity to ask questions live over the phone or through the chat. We're here for you, so – we're going to be here for another couple hours. Please type in your questions or jump in over the phone.

I do see a couple people typing. If you want to hop in over the phone but you're listening through your computer speakers, please dial into the teleconference line. That teleconference information is at the top of this chat window.

And the question that we have reads, "Are there pre-award transition funds available for new national grantees? We didn't receive any email about transition costs today."

MS. CHAPMAN: The email will – if you have them, we'll make sure that we re-send that email before the close of business today. But we did send out the – we'll send you an email with instructions and the form to do the transition funds.

MR. CURTIS: Yeah. And to tack on in terms of pre-award, so, no, the transition costs are from the time that we made the award, which for most of you all was some time last week, through when you all actually start implementing the program. So for the new grantees, obviously, you all will start on February the first actually implementing the program.

But I would just echo what LaMia said. So the transition email that you all received is pretty detailed of what the transition costs can actually be. There's actually a really good form there as well. So you might want to hold onto the question until you get the actual transition email because, like I said, a lot of the details are there and they might actually answer your question.

To Matthew's question, "So how does the grantee know how much it affects the grant amount?" So there's a certain amount that's associated with every – it's actually in the FOA. There's a certain number. I think it's $9,600-something that's associated with every single slot. So that's essentially how we would know how it affects the grant amount.

MR. GONZALEZ: All right. Thanks, Jimmie. I'm not seeing any questions coming in over the phone and not seeing any other questions being typed in. I think we can transition back to the PowerPoint. Michi, sound good?

MS. MCNEACE: Sounds good.

MR. GONZALEZ: All right.

MS. MCNEACE: And I want to say thank you again, Jimmie. Your presentation is basically a great segue into our next presentation.

Our next presenter will be Irene Jefferson. She's going to take us down that financial management journey.

IRENE JEFFERSON: Oh, fun. (Chuckles.) Good afternoon, old friends and new friends that are not so new. If you are unfamiliar with me, my name is Irene – (inaudible) – Jefferson and I am a workforce analyst here with SCSEP and have been here for the past eight years. So some of you who are repeats would know my name.

As a recipient of federal funds, it is important for each of you to know and understand (it ?) and refer to the federal uniform requirements and cost principles. The Office of Management and Budget – OMB – has streamlined the OMB circulars on administrative requirements, cost principles, and audit requirements for all federal awards into one document. And we call that the Super Circular.

The Super Circular combines eight previous federal regulations into comprehensive guides, codified as 2 CFR Part 200, subparts A through F. Uniform administrative requirements, which are the grant management rules, describe the cost – (inaudible) – by description of the cost principles and define conditions for charging costs; the types of costs, whether allowable, unallowable, and allowable with conditions.

Other federal regulations that outline cost restrictions related specifically to SCSEP can be found at 20 CFR 641.

As mentioned early, having strong internal controls and understanding the rules governing how you can and cannot spend federal funds are keys to fiscal management and overall compliance in your organization. It is being accountable and properly managing your public funds are the standards.

Grantees are expected to maintain a state of audit readiness. This means that records and documents pertinent to the financial and programmatic aspects of the grant must be readily accessible for audit. OMB regulations concerning audits of states, local government and non-profit organizations basically require for audits – depends on specific dollar amounts.

Such as in the case of our non-profit grantees, if the expenditure is 750,000 (dollars) or more in a year in federal awards, you must have a single audit – an 8-133 – for under $750,000. Yes. I'm sorry. If you expend that in more than a year, then you must have a single audit. This was increased in 2014 from 500,000 (dollars).

Reporting requirements, when you're reporting and when. This is spelled out in your grant award package. As Jimmie said, your 9130s are due quarterly, 45 days at the end of each quarter. And then we have quarterly narrative progress reports, which are also due 45 days from the end of each quarter. You should refer to your FPO for your guidelines for these reports.

I don't like reading slides. As this slide says, you must have the appropriate method of implementing financial management systems. What's good is a good accounting structure that provides accurate and complete information about all financial transactions related to the program. This should include both expenditures in grant funds and your cash match contribution.

Internal control standards. Although a complete separation of functions may not be feasible for small organizations, some measures of effective controls should be in place. Teams, defined by two or more – we define teams by two or more, and you should have at least more than one.

The most effective method for providing internal controls are simple. This is not all-inclusive and we're just providing examples.

Other standards. Procurement. Grantees must develop procurement standards for federal grants that include conflict of interest statements. Purchases of $3,000 – which are micro-purchases – may be made without bids. Purchases over 3,000 (dollars) and less than 150,000 (dollars) are defined as small purchases. These must go through a formal competition.

Audit. Grantees are expected to maintain a state of audit readiness. Records and documents pertinent to the financial and programmatic aspects of the grant should be readily accessible.

Reporting. The reporting requirements are spelled out in your grant award package.

We need you to always remember the fiscal responsibility test. Do you know what the fiscal responsibility test is? Gary?

MR. GONZALEZ: And to participate in that poll, where the question reads, "Do you know what the fiscal responsibility test is?" The options are: not sure; I do; no, I don't; I think I do, tell us, just to make sure.

So it's kind of split between "yes, I do" and "no, I don't." So I think we'll probably err on the side of we'll tell you just to make sure.

MS. JEFFERSON: Well, the fiscal responsibility test. You should ask yourself these questions. Is the cost allowable? Check with your federal regulations. Are they allocable? Is the cost necessary? And is it reasonable?

We'll move on to the administrative requirements outlined in federal regulation 2641.

You'll open and close Q&A? Sorry. I thought we were going to questions at this point.

Federal regulations administrative requirements. You need to know the difference in your cost restrictions, whether they're administrative or programmatic. And you must know the parameters around your optional special requests. There are seven optional special requests in SCSEP. We do not call these waivers; we call them optional special requests.

641.867, administrative costs. There are limitations on administrative costs. Most grants are 13.5 percent, but you may ask that they be increased to no more than 15 percent. So there are two major cost restriction requirements. Admin, 641.870 of the regulations outlines specifics that you would need to provide DOL – part of your request – to increase admin costs to 15 percent. All requests must adhere to the requirements outline in 641.870, no exceptions.

Administrative costs, requests to increase administrative costs from 13.5 percent. This optional request is approved by the department and it determines whether the request is necessary to carry out the project. You must, as a grantee, demonstrate that the major administrative cost increases are being incurred are a necessary programmatic component, that the number of community service assignment positions in the program, or the number of minority eligible participants in the program, will decline; or the size of the program is so small that the administrative cost amount incurred to carry out the program exceeds 13.5 percent.

All optional requests require DOL approval prior to implementation.

Programmatic costs, participant wages and fringe benefits. Section 641.873 requires that minimum expenditure levels required for participant wages and benefits should be not less than 75 percent of the SCSEP funds, and they must be used to pay for wages and fringe benefits.

So there are laws and regulations that can allow the grantee to reduce the 75 percent towards PWFB by requesting to use not less than 65 percent of the grant funds to pay wages and fringe benefits. The ATSS is one of those optional special requests that can do so.

There are specific conditions to apply to request for additional funds for training and supportive services. The grantee must submit a request to the department for approval. You can use up to 10 percent of the grant funds that would otherwise be devoted to wages and benefits. They have to be used for that skills training and supportive services to enable participants to successfully participate in the program described in the work plan. And the grantee must pay wages from the percentage requested for those individual participants who are receiving training outlined in the work plan.

The two most important optional special requests are the administrative costs and the ATSS. And I will talk to you in a second about that because we have seven optional special requests that you can request at the beginning of each grant year. And since you are starting a new grant year, you can now apply for these optional special requests.

The first one is the change of the 48-month individual durational limit waiver. This means our average – this is the individual duration of a participant. Now, each participant – the law allows each participant to participate in this program for 48 months. You can change your policy at the beginning of the year or at any time of the year. But this one is often confused with being extension of average project duration.

So the extension of average project duration means that on the average, in the program, there's 27 months. That cannot – we can't move – we can change that. You can extend that to 36 months. But one has to do with the overall project duration and the other one has to do with the individual duration of each participant.

You may also ask for an on-the-job experience. You can ask to use those and you need to submit certain documentation for this one as well. I'd ask you to refer to the final rule for guidance as to when and where you may ask for these specific optional special requests, and the guidance – and the parameters in which you can ask for them.

Any OSR must include, but not be limited to, an explanation. And many of them can be submitted at any time. The DOL will require grantees to submit the budget and work plan and description for any subgrantee identified in the request.

And there's something else I want to – (inaudible). We will not approve or – we will approve or not approve no OSR no later than 30 days before the proposed date of implementation.

MS. MCNEACE: Before you go forward, Irene, just I think we should just kind of clarify that. Because you mentioned earlier that there are two special requirements for additional training and supportive services, and administrative increase costs.

So for the request for additional funds for training and supportive services, we listed that what the grantees must submit to Department of Labor to be considered as – to be considered for the request to be approved. And we kind of showed the laundry list there where we say, provide a number of participants that will be displayed, the description of the activity that the grant funds will be spent on. This is related to the ATSS, which is the additional funds for training and supportive services.

As noted, you'll see that there are two bullets that said, provide a number of participants that will be displaced; and the third bullet that says, provide the number of positions that will be eliminated. Even though this requirement's written in our federal regulations, the department has always held the position that under no circumstances will participants be displaced, and under no circumstances would the number of positions will be eliminated. So we just wanted to make sure and clarify that with you going forward.

MS. JEFFERSON: Well, thank you, Michi.

MS. MCNEACE: You're welcome.

MS. JEFFERSON: General financial overview, 641.853. This particular section says that all costs must be classified as administrative costs or programmatic activity costs. Your total allocated budget had two cost categories, as identified in the federal regulations; that is the admin or OPC.

Participant wages and fringe benefits must be categorized under programmatic activity cost category, as well as other participant costs such as supportive services and participant training costs. So this is what it looks like initially; 13.5 percent is administrative costs, 86.5 percent is the programmatic activity cost.

Your notice of awards state that you must submit any request and – oh, I covered that. I'm sorry.

MS. : I think this slide actually just shows what happens in reality when you get your budget and you break it down for your internal purposes. You take that other programmatic cost of 87.5 (percent) and the law requires that 75 percent of that goes to PWFB. So in reality in the grantee world, the pie shows the breakdown, which is 75 percent PWFB, 11.5 other costs, and of course your admin of 13.5 (percent). And that's just to show that we understand how your budget works.

MS. JEFFERSON: Don't we have another poll? "Are you planning on requesting any of the optional special requests?"

MR. GONZALEZ: And to participate, just mouse over and left-click the box to the left of the question. And you can choose more than one option. So select all that apply. "Are you planning on requesting any of the OSR?" And you have the options to choose from: change 48-month IDL waiver option, additional training and supportive service, increase in admin cost, extension of average project duration, OJE, cross-border agreement, or rotation policy. So you can choose all that apply.

So we're going to wait for the results to come in. (Pause.)

So we have some results filtering in. And it looks like we have a lot of split answers. I'm going to throw it over to Michi.

MS. MCNEACE: OK. Well, looks like there's interest in requesting additional training and supportive services; increase in admin cost; OJE is very popular, which is great. And we have some that are interested in changing their 48-month IDL. And then of course just a handful looking at requesting a rotation policy. So thank you. This is great information.

Before we move on, we actually were going to go ahead and open up for questions and answers at this time. And if there's anybody out there that feels they need to stretch their legs, push away from the computer, do a little bit of aerobics, this might be a good time to go ahead and do that. And just remember that this webinar is being recorded, so if you miss anything you can always go back and hit the rewind button next week. Right, Gary?

MR. GONZALEZ: You can. And we're actually going to put a quick poll up, "Do you need to push away?" And you can either choose yes – (inaudible, laughter) – been there, done that; or no, I'm good. Because we are going to take a quick Q&A break. So if you do need a stretch, now is the time. We're going to answer some questions that rolled in. But if you do need to take a quick break, do it now. But we are recording and that recording is going to be available on Workforce GPS in approximately two business days.

So if you do need to take a break – and I see a number of you do – now might be the time for you. We are going to take a couple questions that have rolled in. So I'm going to toss it back to Michi.

MS. MCNEACE: OK. We got a question, "Will state grantees need to submit modification requests if there are no changes?

MR. CURTIS: No.

MS. JEFFERSON: Thank you, Jimmie. We like questions like that. Easy ones.

MS. MCNEACE: Next question, "Can you provide an example when a grantee may benefit from the increase from 13.5 (percent) to 15 percent?"

MS. JEFFERSON: Well, you just can't say that costs are getting high. But increases in rent, unexpected moves, changes in – very specific changes in your grant that would – such as you – like you need another person. You all of a sudden expect – you have unexpected needs for another staff. Those are some of the examples. If you need more examples, you should talk to your FPO.

MR. GONZALEZ: Thanks, Irene. And we do want to direct people, if you're still with us, if you haven't gotten up and stretched your legs, taken a quick break, you're still with us, you want to ask a question over the phone, please press \*6 on your phone's keypad, introduce yourself and ask your question. And you of course have the option to type in your question throughout today's webinar.

So we'll stay here for another 10-15 seconds. If we don't see any questions roll in, we'll flip back to the PowerPoint. (Pause.)

All right. We are back. Not seeing any questions coming in – I actually do see one from Dante (sp). And the question is, "Do cross-border agreements allow participants to be placed in neighboring states?"

MS. JEFFERSON: That's a good question.

MS. : The answer is yes. And this is only for state grantees.

MR. GONZALEZ: All right. The answer. I do see another person typing in. Again, it's a little bit quicker – if you are comfortable with verbalizing questions, just hop in over the phone. We do want to hear your voices. To the point that was made earlier, we don't always have the funds to travel and be with you, so it's always great to hear your voices. Please, we do like to hear your voices. So unmute your line if you can, if you want, if you're dialed in, \*6.

But I do see another person typing in, so we'll stay here while we get that question submitted.

All right. Not seeing any other questions coming in, I think we'll flip back to the PowerPoint. And I'm going to toss it over to Michi. Michi?

MS. MCNEACE: All right. Thank you again, Gary. Now we're going to move on. Now that we've gotten through all of that wonderful grant management, budget stuff, finance stuff, we're going to go into the nitty-gritties. Let's go to – we're going to move into SCSEP the program. And we're going to kick that off with LaMia.

MS. CHAPMAN: SCSEP the program. Administrative management. We cover programmatic assurances, grant management; and under that, that's subgrant management. We have program operations, which is service delivery model. Performance management, which are our core performance measures. And then the data management and reports, SPARQ.

Now, on Friday – no, on Thursday, we will have our SPARQ management system webinar. And that is very important for everyone to either – some new grantees, for you to chime in to get an overview of what we provide, or for existing grantees that may need a refresher. So please, please join our Thursday webinar for that information, where we go into more detail than what we talk about now.

Administrating and managing your – administering and managing your SCSEP program, grantees are either self-administering or subgranting – subawarding. If you are subawarding a portion of your SCSEP program, you are still responsible for your program, not your subs.

Programmatic assurances. Our programmatic assurances outline standard grant requirements that are required by law and those that are consistent with program practices. Grantees must certify when they check off – checking the boxes that they will conform to the assurances and will continue to conform with these assurances throughout the grant period.

Here are the assurances. Recruitment and selection of participants, assessments, recertification of participants, physical examinations, orientation. These are assurances are signed by your organization's authorized representative and is submitted as a part of your grant. These assurances outline which grantees are – what a grantee's responsible for, and for what outline in your SCSEP operation.

Managing your SCSEP grant. We provided a few things we think are important. Standard operating procedures, such as guide the day-to-day operations, organization staffing structure, program monitoring, performance management, data entry and integrity.

Then you have your program policies, which are your durational limits, termination, complaint and grievance policies.

And you have your SCSEP budget, managing your PWFB – which is wages, fringe benefits – your budget versus your actual costs, and ensures that these do not exceed your cost limitations.

So managing your SCSEP budget requires a close relationship between your program team – or the team, two people or more – and your finance team. The two must be on the same page and understand how the budget impacts your program performance, and vice versa. So doing budget projections based on enrollments and exits, monitoring current payroll expenditures, and comparison to service level and community service hours are all important.

Subrecipients. This is important. SCSEP grantees operate their program by self-administering, subawarding, or using a combination of both. Grantees are responsible for managing and monitoring their subrecipients and ensuring that the terms and conditions of the subrecipient contract are in compliance with all applicable regulations and the terms and conditions of your award. The provisions of your grant terms and conditions must be applied to any subrecipient under the SCSEP award.

My question, "Do you subgrant?" Well, let's read it. What do we have so far? Not us; well, yes, we do; we do both, sub and run it ourselves; still thinking, no vote. What do we have?

MS. MCNEACE: Looks like "well, yes, we do" is leading.

MS. : I like Gary's – (inaudible).

MR. GONZALEZ: It's pretty much a split, 4, 19, and 4. So four "not us;" 20 "well, yes, we do," with a resounding number of people saying that they do; and now it's up to five "we do both, sub and run it ourselves."

MS. CHAPMAN: OK.

MR. GONZALEZ: I think we'll flip it over now to our next Q&A break. So again, beating this horse until it's quite dead, we do want to hear from you. We want to hear your voices. We want you to know that we're here to answer your questions.

Please hop on the phone line if you have a question rolling around. Even if it's something you think may not be super relevant, please jump in; we want to try to answer your questions, whether it's over the phone or through the chat. Please, avail yourselves of the speakers. They are the subject matter experts. They're here to answer your questions. So this of course isn't the only opportunity for you to contact them; it is the best opportunity, gets the quickest response, because it's live.

So we do see a couple people typing in. I think I have a question for me. Do I think the Thursday webinar will be recorded too? (Inaudible) – time difference here in American Samoa. Yes, the webinar on Thursday will be recorded. Same protocol; it'll be posted in two business days after the event concludes. So since it's on Thursday, it'll most likely be available to you close of business Monday or early Tuesday.

And we do see another question coming in. And just to underscore the point, if you do choose to hop in over the phone line, please unmute your line by hitting \*6, introduce yourself and ask your question.

All right. We do have a couple of questions rolling in. And thank you, Monica and Seeto (ph) – or Cheto (ph) – hopefully I'm pronouncing that correctly. I'll turn it over to Michi. Michi?

MS. MCNEACE: OK. We have a question, "Is an RFP required for subcontracts?"

MR. CURTIS: So thanks, Monica, for that question. So what'll happen is you all don't have to submit your procurement method to us of how you plan on actually procuring the goods and services, or even how you plan on doing your subaward. What we do want to sort of make very clear, though, is if there's an audit later on, or we ever need those materials to determine and make sure that you all did a full and open, fair competition, we definitely recommending doing a full and open RFP or an FOA – funding opportunity announcement – however you all choose to procure those services. We recommend you all do it fair and open.

So my answer is, while you don't have to do it, there are some situations where you might be able to sole source, those are very limited. And in fact, a lot of recipients sort of get hung up on that at some time. They do a lot of sole source contracts without following proper procurement methods, at least detailing why they decided to do a sole source contract.

I would recommend you all do lots of market research, and more than likely there should be multiple organizations that are capable of performing whatever services you all actually need performed.

And then, do we have a recommended subrecipient monitoring guide or checklist? I'm not aware of one that we have. However, I would definitely just recommend you all consult 2 CFR 200 and it goes over some of the responsibilities of the lead, or quote/unquote, "prime" grantee in terms of how you all need to monitor and keep an eye on any subrecipients you all have.

If I do come into – if I do see or find a good guide, I definitely will share it with the team here and I'll share it with you all. But 2 CFR 200 is going to be your best bet and there's a whole section on subrecipient monitoring and oversight that I recommend that you all review. That'll be sort of your guidance that if you want to do your own checklist, you could use that to do that.

MR. GONZALEZ: All right. We have another question I think coming in. And it's from Paul and it reads, "Is there a limit for how many program contacts we supply SCSEP national?"

MS. : Yes. There is for national grantees, just so that we can keep our list serve at a minimum, it's required for SCSEP nationals its three. For states it's two. Am I correct?

MS. : You are correct.

MS. : OK.

MR. GONZALEZ: All right. Thanks, Paul. I'm not seeing any other questions being typed in. And I'm not seeing anybody unmute their line, but I'll double-check that. All right. I don't think we have any other questions rolling in, Michi.

MS. MCNEACE: All right. So we're going to move on. So we've heard about all the policies, we've heard about the laws, we've heard about the regulations, we've heard about grant management. So we all ask ourselves, why do we do what we do? Why are we here?

And I'm sure everybody will agree with me, it's all about our participants, the low-income seniors that we provide these services to throughout our nation.

So we're going to go ahead and move on. We're going to talk about participant services, our partners and – so I want to state this – just like a disclosure, if you will – that this webinar is a high-level – it's an orientation. So we're not going to get into the mechanics or the nitty-gritties of everything. So just so that you know what we did for participant services.

Participant services, the basic principles are pretty relatively simple. What we do is we recruit and serve low-income older adults from targeted populations in the most in-need and minority populations. Those individuals that have the greatest economic need. We pay them wages and benefits, as required by federal, state and local law, while they're in community service or going through training.

We do provide comprehensive SCSEP services and appropriate community service assignments that are related to the participant's employment goals. We provide additional skills training that aligns with their employment goals and is documented in their IEP – or their individual employment plan.

We provide participants the appropriate supportive services through shared resources, if possible. The law does allow that you pay for supportive services with grant funds that will be necessary for that participant to successfully participate in the program and also retain their employment – let's say exit for employment. The regs recommend that you provide follow-up services for up to 12 months after exit for employment, so that we can assure that that participant has what they need to maintain that job and continue to be successful.

And of course, coordination with other agencies, which are our aging and workforce partners, by providing additional referrals and related resources for participants.

And then our job is to help our program participants find unsubsidized employment. And of course, we all know, adhere to the project duration of that fabulous 48 months.

So we move on to our partners. We can't individual do this job without our key partners. And our key partners is our host agencies. They provide the community service assignment training opportunities for our participants.

And our host agencies all have to be either public agencies or private nonprofit organization that is exempt from taxation under 501(c)(3) of the Internal Revenue Code. We've seen in the past where local host agencies will get a tax exempt from their local state. That is not in compliance; it has to be from the federal level.

And what we recommend that our grantees do, is when you're out there recruiting for host agencies, recruit viable host agencies that will provide the soft skills training and the skills development for participants, giving them the opportunity to learn the things that they need to learn to prepare them for employment. Maintain a variety of host agencies that reflect the current in-demand labor market industries. And of course, always making sure that we ensure a safe and healthy training environment for all our participants. And then making sure that our host agencies adhere to the maintenance of effort requirements.

Partnerships. We talked about how valuable our partnership is. After our host agencies, we have our workforce and aging partners.

Our workforce partners. It is a mandatory requirement for SCSEP to be a partner of the WIOA. Grantees need to be familiar with WIOA work requirements and follow all applicable rules under WIOA.

For those who question what is WIOA, it is the Workforce Innovation and Opportunity Act, which was signed into law on July – in July of 2014, Steve?

MR. RIETZKE: Yeah.

MS. MCNEACE: (Inaudible) – correct? OK. Great. Collaboration with the states and other national grantees, if necessary, to provide a comprehensive framework for the state plan. What we're saying here is that our state grantees are required to submit a state plan. Whether it is a standalone or an integrated –

MS. : Combined.

MS. MCNEACE: Combined. Combined state plan. And it is always recommended that our national grantees and our state grantees work together with your workforce partners to develop those plans.

And part of the required partners is of course coordinating your efforts with the American Job Centers – the One-Stop Centers, as we used to call it. They provide the referral services for core and intensive services.

Co-enrollment. Co-enrollment is considered for this program, is when that participant is receiving services under Title I programs. So if they are registered in accessing core services, that would not be considered as co-enrollment for the program.

And then we also use our American Job Centers to help us to recruit eligible participants.

And then the workforce investment board. We urge you to continue collaborating and communicating with your local WIBs. Even though we know under WIOA that SCSEP is no longer a mandatory partner of the local WIBs, but we encourage that you continue the relationship and try to get – try to maintain a seat at that table.

Steve?

MR. RIETZKE: So SCSEP is not a mandatory board member –

MS. MCNEACE: Board member.

MR. RIETZKE: – at the local level, but they're a mandatory partner. And I should mention too that there is guidance, which I think I mentioned to you all before, but there's guidance in the works that we hope to get out very, very soon that – two particular pieces that I'll highlight.

One is about One-Stop operations and kind of talks about what does the relationship look like between local American Job Centers and required partners? What does the kind of operational MOU look like? It highlights some of the ways that we think SCSEP grantees are of particular value to the local American Job Centers, and vice versa.

And then the second piece is specifically about One-Stop infrastructure funding and what those agreements look like and kind of guides more into the specifics of what that negotiation process should look like, what the – further defines some of the terminology that you see in the regs related to infrastructure funding and other costs in the cost-sharing agreement.

So definitely – we will definitely highlight those to you once those guidance letters come out. And we encourage you to read those closely when they do.

MS. MCNEACE: Thank you, Steve. So moving on to our aging partners. Our state and territory SCSEP grantees, they are either one or the other; they are either from the workforce or the aging public agencies. So the collaboration and partnership is there, but we would – we should improve or increase or enhance – coordinate our efforts a little bit more strategically for our SCSEP participants.

So coordination with the Administration for Community Living at the local level would be your Department of Aging, your area agencies on aging, aging and disability resource centers, and other advisory groups within the community that advocate for seniors and workforce entities, things of that nature.

And one of our other most important partnerships is with employers. Employer engagement. Without our employers' commitment and support, I don't think we would be able to find our participants those really good jobs. So maintaining strong partnerships with local and national employers is necessary for this program, for our participants.

I hear this on a daily basis. We are the Department of Labor here, so employment is a prime focus. We understand the community service piece of it, but moving with the employment piece, increasing your relationships with local employers, having them to create opportunities for OJEs. Help the participants connect to those employers that are senior-friendly, if you will, that are willing to work with us to employ our older adults.

So with that, this concludes this segment of the orientation. And what we're going to do is move to another one of our wonderful polls.

MR. GONZALEZ: All right. And the question reads, "Do you need technical assistance and/or training?" And the options are: yes, more TA, please; yes, more training; no, we got this; or not right now, but we'll let you know when we do.

MS. MCNEACE: And we asked this question because this webinar is just an overview. So we just kind of hit the high points. If you feel that you need more in-depth or more intensive technical assistance and our training that will help drive the program for you, please let us know and that's what we're here for.

MR. GONZALEZ: All right. I think we're going to transition now to our next Q&A break. So again, you're probably tired of me saying this, but we do want to hear from you. If you want to elect to hop in over the phone, please do so. It's \*6 on your phone's keypad to verbalize a question or a comment. If you're more comfortable typing in your questions or comments in the chat, you always have that ability to do so.

So we're going to take a break now and wait for questions to roll in. (Pause.)

All right. We're not seeing any questions roll in. Actually, I do see another person typing in right now. Karen (sp), we take your suggestion, "More training on employer engagement is always needed." Thank you for that.

I actually do see another person typing in. This is not our last Q&A break, so I do advise you to keep typing any questions. We have one more after this. But we're going to go ahead and flip back to – oh, there we go.

"On slide 64, what is maintenance of effort requirements?"

MS. MCNEACE: It gets very much into detail. So what we'll do is after this webinar we will send you the maintenance of effort definition.

MR. GONZALEZ: All right. Michi?

MS. MCNEACE: OK. As LaMia mentioned earlier on about our performance measures, we're not going to discuss performance measures and all the intricates. So this is basically to give you the overview as to what is the nationwide goal is for PY16 for all six performance goals.

And please note that each grantee, you have the opportunity to negotiate your goals during the goal negotiation process. And on November 17th, Thursday, it'll be part two of the NGO. They will both – Bennett and Terry will focus on performance goal systems, performance systems, your performance measures, and SPARQ. So we're going to just kind of leave that to them for next – for two days from now, right?

We're going to go to the next slide. And yet again, this is just to give you an idea as to what our data management system is. SPARQ is the SCSEP Performance and Results QPR system, which provides SCSEP and its grantees an automated system for managing participant data and evaluating your performance.

The WDCS is the Web Data Collection System. It's the system that you use to put in all that wonderful data into the system that feeds into SPARQ. So yet again, on November 17th, Thursday afternoon, we'll have part two.

And with that, we're going to go ahead and move to – we're going to start winding down. We're going to go ahead and move to the communication piece of how the program works. And I'm going to go ahead and pass this on to LaMia.

MS. CHAMPAN: OK. SCSEP community. This is the hierarchy. The grantee communicates with the FPO. The FPO then will communicate with the national office, the grant office, or our TA contractors. Your first point of contact will always be your FPO.

Now, next slide. With your FPO's approval, the grantee may reach out to the national office for policy-related information. The grants office, as Jimmie explained, for grant-related issues. Or for your SCSEP SPARQ issues that you're having or that you're training requirements. So with your FPO's approval, the grantee then can then reach out to the national office, grant office, and TA provider.

We will always keep the FPO in the loop of anything and all communications and guidance we provide you.

So as we talked about again, here's the grantee communication with DOL. Your first point of contact is your FPO, and we'll let you know who they are. FPOs work directly with us, the national office, the grant office and our TA contractors. And again, we direct the – with the FPO's approval, grantees can work directly with the program office, grant office, and the SPARQ and SCSEP contractors.

So let me ask, what region are you in? Are you in region one, two, three, region four, five, or six, or you have no idea what a region is? (Pause.)

MS. MCNEACE: So basically, we're going to just kind of – like I said, we're winding down. And we're just going to go a quick overview as to who your federal project officers are in each region. And please keep this in mind, the list of project officers that we have listed are just for the national grantees; we did not list out the ones for the states.

So for region one, in Boston, Massachusetts, we have Suzanne Pouliot. In region two, in Philadelphia, Pennsylvania, Matthew Capucini, who has also joined us from Pennsylvania. Region three, at this time we do not have an FPO assigned to a national in regional three. There's no nationals in region three.

In region four we have Charles Cox and Edgar Garcia. Region five, we have Gary Lewis. And in region six, John Jacobs and Marjorie Fong.

And as we said – this is a disclaimer – as of now, this is the regional makeup that we are aware of. It may change; and then once it does change, we will let you know.

So the next steps. We do have a transition webinar coming up on December 1st. And important date to remember, February 1, is that effective transfer date. So what you should expect at that, we will continue to work with each of you to ensure a smooth transition, and we will set up time to discuss your performance goals at a later date. And those questions that you may have about your performance goals, please hold them until Thursday for the webinar.

Before we go, we have a question that came in that says – we have one question, "Can OJE cross over state lines?" Huh. That's a good question.

MS. : Yeah. We do not know of any requirements that restrict –

MS. MCNEACE: If we're talking about an employer that is in another state, can they go to another state to do their OJE?

MS. : That's a good question. We'll get back with you, Maria, on that question.

(Cross talk.)

MS. : So right now we don't know of any requirements that restrict that – restricts additional pay, training, to states in which a sub is located. But we'll look into that for you.

MS. MCNEACE: And then we have one, "Will our goals remain the same if we negotiated already in quarter one?" National grantees' negotiated goals for PY16 remains in effect under the new awards. Grantees have the right to request re-negotiations if the new award creates a substantial change in your circumstances. So no rush. We have until 90 days after the end of PY16 to re-negotiate your goals. I hope that answered your question.

Do we have anything else? Looks like that's it for now.

So this page will provide you where you can access resources. We have the SCSEP web page with this doleta.gov under seniors, which will give you an abundance of information about your performance, all your TEGLs, things of that nature.

Then we have Workforce GPS, where you will access the community of practice "older workers," where you will be able to access a copy or the recording of this webinar. Your performance reporting information is also on DOLETA. And then additional guidance and resources, we have DOLETA, we have SCSEP Help, we have www.sparq@doleta and sparq.ed. And then of course, all the laws and regulations are on DOLETA as well.

So we are coming to an end. Our last poll is, "Do you feel you're ready for February 1?" Our questions are: I'm getting there; ready to rock and roll; and huh, what happens on February 1; ask me next month. (Pause.)

As we wait for the responses to come in, drum roll please, Mr. Gonzalez.

MR. GONZALEZ: Looks like it's split between I'm getting there and ready to rock and roll are the two main contenders. We have one person asking what's happening on February 1st. And a couple people, talk to me later.

MS. MCNEACE: OK.

MR. GONZALEZ: So I think we'll flip over to our last Q&A break. We do ask that if you can, stick with us as we wrap today's event, so that you can provide us some feedback, how we did, how the technology worked. I do know that we had some issues with the phone early on. But the platform, the content, how we can improve, we ask that you stay with us so you can provide us that feedback.

But now is our last Q&A break. So if you were holding off on a question, if you were thinking of whether it was relevant or not, now is the time to ask that question.

We do see some folks typing into the chat. I do want to remind you, we are recording today's webinar. We're going to post that recording to Workforce GPS in approximately two business days. So today's Tuesday; it'll most likely be up Friday with a transcript of everything that was said over the phone. And the handouts and the PowerPoint are already up on Workforce GPS. But like I said, the recording and transcript will be posted in approximately two business days.

So I do want to ask that if you can stay on, please do so. We want to get as much feedback as we can from you, how we can improve, what you like, so we can do it again. But we don't want to cut you off. We do see one or two people typing into the chat with any questions that they might have.

(Audio break.)

All right. I think all the questions have been answered that have been submitted. So I'm going to turn it back over to Michi. Michi?

MS. MCNEACE: Thank you, Gary. So we have come to a conclusion and we actually did it in less than two hours. Yay. (Applause.)

So the team here would like to thank each and every one of you for joining us this afternoon. And please, as Gary mentioned, this webinar is recorded and will be posted on our CoP in two to three business days. And we would also like to say thank you again. And if you have any additional questions and training and technical assistance needs, please contact your FPO and we will respond to you as quickly as possible.

And once again, thank you. And have a wonderful rest of the afternoon.

MS. : And again, congratulations. You've made it over the finish line. Now the work begins. Take care.

(END)