**WorkforceGPS**

**Transcript of Webinar**

**MOU Negotiations: The Partner Perspective - A Virtual Roundtable**

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JENNIFER JACOBS: (In progress.) You'll receive one survey by e-mail directly following today's session and a follow-up survey one month from now.

So again, we want to welcome you to today's "MOU Negotiations: The Partner Perspective" webinar. And if you haven't already done so, please introduce yourself in that welcome chat. Now, without further ado I'd like to turn things over to our moderator today, Chanel Castaneda. She's the grants management specialist for the Office of Grants Management at the U.S. Department of Labor. Chanel?

CHANEL CASTANEDA: Thanks, Jen. Hello, everyone. Like Jen said, my name is Chanel Castaneda, and I am a grants management specialist for the Department of Labor, Employment and Training Administration. I will be one of your moderators for the event, as I'm joined by my federal colleagues Kirk and Craig. I'll let them introduce themselves in a bit.

The goal of this virtual webinar is to break down silos, bring partner programs to the table, and have a larger discussion on their experiences with local negotiations. We are aware that various programs have discussed amongst themselves about their local processes, but we wanted to bring those discussions to a bigger audience nationwide.

That's why we've assembled representatives from various programs, some that are not usually represented in this nationwide platform, to share in their local negotiations. I'm sure the audience is tired from hearing from the feds on laws and regulations. So this will be refreshing to hear from actual practitioners in the One-Stop community to share and discuss their experience.

We have grantee representatives from the Department of Labor, Education, and Health and Human Services that will not only talk about the good, the bad, but also the ugly. Our hope for this roundtable is for the audience members to not only learn from our panel's best practices but also the obstacles they face during the local negotiations.

Now, I'd like to introduce Kirk and Craig, my co-moderators for this event. Kirk?

KIRK LEW: How's everyone doing today? My name is Kirk Lew. I'm a senior policy advisor with the Department of Labor's Office of Disability Employment Policy, and I'm looking forward to a great discussion, like Chanel said, an opportunity to listen to and learn from some dynamic panelists who are currently going through the MOU process and really looking at building on those partnerships and those relationships. So we're very excited to offer these opportunities to the nation. So thank you.

CRAIG MCMANUS: Hello. My name is Craig McManus. I'm a financial management specialist under the Rehabilitation Services Administration within the U.S. Department of Education. Like Kirk, I'm very excited to see what comes out of our panel today. Before we move forward, I want to turn it back over to Chanel to continue on with our introductions.

MS. CASTANEDA: Thanks, Craig. Now, I'd like to introduce the other members of the work group. It wasn't just me, Kirk, and Craig that put this together. We had other work group members that worked really hard to put this virtual roundtable together. For this live event, they will be the federal resources throughout the event. Lekesha?

LEKESHA CAMPBELL: Hi. This is Lekesha Campbell. I'm with the U.S. Department of Education in the Office of Career, Technical, and Adult Education.

CHRISTOPHER MAYO: Hello. This is Christopher Mayo. I'm a regulatory policy analyst with the Department of Labor, Employment and Training Administration.

JACQUI SHOHOLM: And my name is Jacqui Shoholm. I'm a senior analyst in the Office of Policy Development and Research at the Department of Labor, Employment and Training Administration.

SUSANNA TROXLER: Hi, everyone. I'm Susanna Troxler, and I'm a workforce analyst at the Department of Labor's Employment and Training Administration. I work on the senior community service employment program, which is a required WIOA One-Stop partner.

CHARLES WATTS: And I'm Charlie Watts, accountant, Department of Labor, Employment and Training Administration.

MS. CASTANEDA: All right. Thanks, guys. First, before we start I wanted to do a poll just to get a temperature check on how the whole MOU experience was for everyone out there. So, Jen, can you please bring up the poll?

So how was everyone's MOU local negotiation process? How did it go? Was it easy breezy, we don't need to improve our process? Was there a lot of bumps in the road but the process is good and we don't need improvement? Was it blood, sweat, and tears and we will need to improve the process for next time, or I'd rather not say?

So please just take a second to just fill it out. It looks like we had a lot of blood, sweat, and tears out there. Hopefully, everyone saw this as a learning curve. It's the first time out with the new regulations. So hopefully, you learn from your own experiences as well as the experience from our panel so you can make it more easy breezy the next time when it comes down to renegotiating the process. OK. Just give it a second. OK. Thanks, Jen.

Before we start – before I let the panel members introduce themselves, I have to go over some disclaimer language. We just want to highlight that there are many ways and different perspectives to negotiating and developing an MOU or memorandum of understanding, as each local area must meet the local needs of its local area. The ideas and perspectives presented today represent only those of the speakers based on their program and local area's unique experiences.

Today's roundtable is meant to be a discussion amongst parties and is not intended to provide formal guidance. Moreover, ideas and perspectives shared today should not be considered to represent the views of the Departments of Education, Health and Human Services, or Labor, nor should the final MOU product of any particular local area be presumed to have received the departments' review or approval. The experience of the panel members are products of their own individual experience and should be viewed as a support resource for local areas in developing their MOUs or renegotiating their MOUs.

Well, that was just a little disclaimer language, and we just got that out of the way. So I'd like to actually introduce our panel members for today. I'll turn it over to Brandon.

BRANDON BUTLER: Good afternoon, everyone. My name is Brandon Butler. I am the deputy assistant secretary for the Division of Workforce Development and Adult Learning at Maryland's Department of Labor, Licensing, and Regulations.

NITA D'AGOSTINO: Good afternoon, everyone. I'm Nita D'Agostino, and I'm senior vice president for direct services for Pathstone Corporation. For those of you who may not be familiar with Pathstone, we are a private not for profit community development and human service organization providing services in Indiana, New Jersey, New York, Ohio, Pennsylvania, Virginia, Vermont, and the Commonwealth of Puerto Rico.

I also want to add, just so that you are familiar, because we are a non-profit the specific to today's conversation, our workforce development areas we are a One-Stop operator, a Title I youth program provider, funded nationally for the National Farmworker Jobs Program for re-entry programs, and with senior community service employment program, through the National Council on Aging, let alone other areas of the state.

MS. CASTANEDA: Amy, do you want to introduce yourself?

AMY JUDD: Yes. Hello. I am Amy Judd from Lord Fairfax Community College, which serves seven counties and one city in the northwest area of Virginia. I direct a regional adult education program that is mostly funded by WIOA Title II's Adult Education and Family Literacy Act. So my program has class sites in 17 locations throughout the Northern Shenandoah Valley, which includes a One-Stop center in the city of Winchester.

BRIGID MCRAITH: Good afternoon, everyone. My name is Brigid McRaith. I'm the CEO of Mile High Youth Corps, which is a 501(c)3. We're located in 22 counties in metro Denver and throughout Colorado's southern front range. We focus on education, employment, and training for 18- to 24-year-olds in a wide variety of career pathways, but in relationship to this call, we have a DOL-funded YouthBuild site which mandates that we have an MOU with our local workforce development offices in partnership with WIOA services.

CRYSTAL PERRY: Hi. I'm Crystal Perry, and I am the director of our state VR program's WIOA Compliance and Policy Unit. And what that basically means is I'm the attorney for our VR program.

MS. CASTANEDA: All right. Thank you, everyone. As you could see, we have a variety of individuals who represent our panel. The first question I'd like to ask our panel members, just so everyone can get to know you guys a little bit more, is, what is your involvement in the local negotiation process, and how did you first get involved in the negotiations? Brandon?

MR. BUTLER: Sure. So with – I am – we led the state's workforce MOU negotiations and the infrastructure costs or what we called at the state the resource sharing agreements. We put out a policy in September of 2016, and for those who are still licking their wounds regarding the process, this was a policy process that we started about a year before September 2016.

We had a lot of help from our regional office with U.S. Department of Labor to really make sense of what – or what makes sense for Maryland. So we started – we started the negotiation process very much in line with our local planning process. And so MOUs were due in Maryland by December of 2016, and then we – after the local plans were approved, after the MOUs were in place, then we sat down and started talking about resource sharing and tackling this beast that is infrastructure costs.

And so my involvement was to really be the facilitator between partner programs both at the state that included both our state's VR program as well as the TANF, Temporary Assistance for Needy Families or what we call in Maryland temporary cash assistance.

We are one of 15 states – 15 or 14 states, depending on who's counting – in the United States to include TANF as a combined plan partner in the state's workforce plan. So there was a lot of angst over really what infrastructure costs were and a lot of education that went in the process. So that was really my role as the state had tackled it and I am glad to say Maryland is completely through the process and there is hope on the other end.

MS. D'AGOSTINO: This is Nita. I would say that our MOU negotiations, we became involved in the process primarily and initially because of our connections to federally funded projects. The state and under WIOA it was very specific that MOUs needed to be developed with contractors who may be funded federally but yet circumvent certain areas of the state. So we became involved because of the National Farmworker Jobs Program because of the requirements connected also to the monitor advocates at the state levels, in addition with our senior community service employment program. Though we are a subcontractor to the National Council on Aging, it is required under WIOA that we also negotiate from that perspective, and then, thirdly, because of our multiple reentry projects statewide.

I want to say that our involvement really actually – though there was apprehension, I want to say that it really actually opened the doors to allowing other people and partners to more completely understand the requirements of different programs and also that we all actually speak the same language, even though we have funding from different areas, and we have much more in common that we do not.

MS. JUDD: Hello, everyone. This is Amy. I have a bit of a dual role in this process. As I said in my introduction, I direct a regional adult ed Title II program and we operate under the lead agency of a community college but I'm also a member of our local workforce development board for my region of Virginia, which actually serves a really large and diverse geographical region in the state. We cover about 16 counties and cities, I believe. So my reason for involvement was twofold because our workforce development board contracts the Title I services to our local provider.

I think in my area we've been quite fortunate because our workforce development board CEO made certain that all of our board members, all of our WIOA mandated partners, and also relevant non-title partners were involved in the development of our local workforce development plan, which I think has really set the stage for a coordinated and quite diplomatic One-Stop MOU development. I've been at the table for all of these discussions, which I find to be very helpful to me.

I do think I'm at a different phase of this process than some of my counterparts on this panel because, in my area of our WDB region, we have a brand new One-Stop, truly brand spanking new. Just a few months ago it was a shell of a building in a city's historic district, and it's now been fully renovated. But that's been quite an accomplishment for our board, but because of that we're still negotiating the final details. Not to worry, though. Our board has had a template that's been used as a certified comprehensive One-Stop in the southern end of our region, and so far it looks to be a really good model for us as well.

But I think that a key point in all of this for me is that our region has the advantage of our WDB CEO serving on a state committee to develop a consistent statewide cost allocation infrastructure agreement template. And a related vein, I get to be involved in the coming weeks in the cost methodology work group for adult ed providers to determine how we can fairly calculate the cost to providing career services at the One-Stop. So while we're not quite done, I'm definitely highly involved in the process.

MS. MCRAITH: Hi, everybody. This is Brigid again. So for how this sort of worked at the Denver metro level, we were actually approached by Denver's local Office of Economic Development really when the same time that it was coming on our radar in terms of the changes with WIOA.

They shared some initial templates, which we negotiated through and wanted to see some changes in, but that first year the timelines were really tight and the process was a bit rushed on our end. But of course – well, not of course. I think one of the pieces we were really fortunate for was that both parties were coming to the table really wanting to get it done.

We've long been a strong partner with the local workforce board, and so that was helpful, probably one of the most helpful pieces for us in this process. But, unfortunately, at the same time the new WIOA legislation was introduced, our workforce centers were undergoing some very significant local changes in who was really running the One-Stop centers, who was managing out-of-school youth contracts, and that's led to not a lot of actual results from the MOU.

We're really just renegotiating our second year of the MOU. We've just started that process this week, and there are a lot of changes that the state's proposed that we'll need to work closely with the Office of Economic Development on. So we are a partner of the office, and that Office of Economic Development has essentially subcontracted out-of-school youth services, and then that contractor runs four local One-Stops in Denver. So that's just some context on who we are and how it looks in Denver.

MS. PERRY: Hi. This is Crystal, and what we did is we began meeting at the state – I'm at the state level, and the state workforce development entity led discussions with the WIOA core partners for several months. We included the fiscal officers and lead WIOA contacts with each program, whether it was the program attorney or program director. We were meeting often to sort of set up the negotiation process or at least a template for that as well as draft the Georgia service delivery guidelines, which was sort of a summary of the regs.

We worked off of a couple of states that had already invented the wheel. Those drafts were distributed to the local workforce development agencies for review, and of course we also provided cost-sharing examples and sample breakdown of funds. And finally, of course, these were presented to and approved by our state workforce development board.

And then we have 19 One-Stops, and so our state leaders created a calendar for the workforce development agencies to review and approve because we wanted to be at the negotiations and we ran twice – we ran through those twice. I was present at each negotiation around the state in addition to our local staff. So there was a state person and a local person there, and as often as possible we had a fiscal person present or they prepared information ahead of time. OK.

MS. CASTANEDA: Cool. Thank you, everyone. I just wanted to give a friendly reminder. I didn't say this earlier, but I just want to give a friendly reminder that MOUs were due July 1st of 2017 and that the deadline for the final IFAs are January 1st, 2018. Note that there may be some renegotiation of the MOUs due to the IFA, however the partners agree upon in the IFA, there may be some renegotiations of the MOU but that the final IFA is due January 1st, 2018. OK.

So thank you, panel members. Now, I want to turn it over to Kirk who will have our first question to our panel.

MR. LEW: So hello, everyone. This is Kirk Lew again, and we are not going to pull any punches. And these two questions are directed at Brandon and Amy, and we'll start with you, Amy. And the first question is, describe the obstacles experienced in your local area or areas that you were responsible for when negotiating your MOUs and infrastructure costs. Amy, why don't you take that question first?

MS. JUDD: Sure. I honestly feel that our process so far has been fairly smooth. I think having a strong workforce development board has been instrumental in leading that, but it is interesting to me over the years that we've been looking at the WIOA regs and preparing ourselves for this how the WIOA information has flowed from the state level to the regional and local level for each of our mandated partners.

Even from locality to locality within a region, sometimes the same agency in a different locality may have hopped on board the WIOA train, so to speak, at a different time. And I wouldn't say that we've had agencies unwilling to come to the table, but it does take time. And based on an individual agency's bandwidth and programming cycles and leadership, it has taken time for the buy in and the people to come to the table agency by agency.

And there are also sometimes unexpected and uncontrollable situations. For example, we had an agency in our region that had just signed a lease for office space that made it impossible for them to collocate at or One-Stop even though we all hoped that that would be possible. So we've just been working really hard towards other viable options to make them present in one way or the other in our One-Stop and to involve them in the service delivery process.

MR. LEW: Great. Thank you, Amy. And Brandon?

MR. BUTLER: Yeah. I think this was a learning experience for everyone. This was an opportunity, as was mentioned earlier, for partners to move past the strategic planning and move past the day-to-day operations that were memorialized in the MOU and move towards the monetizing the relationship that our local areas built in steps one and two in the local plan and in the MOU process.

So we kind of staggered that in Maryland, and to be quite honest with you, the guidance at some points it was almost maddening that we were kind of waiting on guidance, waiting on guidance, but really at the end of the day Maryland really was able – and again, I give credit to our region two folks in Philadelphia, that they really gave us enough room and enough bandwidth to make sure that we did what was right for Maryland. Our process in policy formulation was collaborative, and so when it came time for buy in from our state and local partners, that buy in was had and we could move forward in what would otherwise be a difficult process.

For our local director – our local areas – our concern at the state was to jump too quickly into the infrastructure cost conversation. The last thing that I think anybody wanted was to essentially say to their new partners, welcome to the table. Welcome to our family. Now, where's your checkbook? So overcoming that was definitely something that took a lot of finesse and a lot of education.

MR. LEW: Thank you, Brandon. And before I hand it over to Craig, we move over to our second question. Are there any of our other panelists that would like to take that question? And just to reiterate the question, describe the obstacles experienced in your local area or areas or in local areas that you were responsible for when negotiating MOUs and infrastructure costs. And I will also open that up to our federal partners as well. If not, I'm going to hand it over to Craig. Craig, go ahead. Take it over.

MR. MCMANUS: Thank you, Kirk, and thank you to Brandon and Amy for your responses to that question. This question is geared towards Nita, and the question is, are there any specific challenges that had to be addressed that you had not anticipated at the beginning of this process?

MS. D'AGOSTINO: Yes. First of all, I think one of the challenges we actually had to evaluate was our apprehension and looking at our limited dollars and what were people going to request of us if we began a partnership connection to the local One-Stops. We actually headed in the wrong direction, I should say, at the beginning because we thought maybe it would be easier to develop an MOU at the state level.

Once we had a meeting with the assistant secretary of the Pennsylvania Department of Labor and Industry and she actually gave us some really good recommendations, which was that we should target those areas for our specific services that we felt our dollars could do the greatest good and negotiate more at the local level. And so that's what we began doing, and when I talk about that, I'm talking about that we developed MOUs that were connected to the National Farmworker Jobs Program, MOUs connected to our Senior Community Service Employment Program, and our reentry program.

I think one of the barriers that we also saw as a challenge is that the National Farmworker Jobs Program kept being pushed aside as one of the grants that was really connected to outreach, and really it is a Title I Section 167 grant. And so getting the local partners to understand that, not only were we Title I but specific to a targeted population which I have to say then opened the doors for people to start really considering multi-barriered populations, which I think is a benefit to the whole One-Stop system.

In addition, beyond the NFJP and the SCSEP program and the reentry programs, we actually developed what we believe were good templates that we took as our base for negotiations and made requests that inside the MOUs that not only do they ask the question when people are enrolled into the One-Stop are you a migrant seasonal farmworker, are you 55 and older, or have you been incarcerated, that then they would see that there are other experts in the local communities who could assist with those particular issues. So our templates really defined eligibility, career services, and training services, which we asked them to place into their MOUs, which I believe really worked effectively for us.

We also then had to take a look at another challenge, and that was how do we provide a service to our targeted populations in the areas where maybe a farmworker or a 55 and older person is just coming through that area. What we did was we actually set up a toll free 1-800 number that we could be connected to One-Stops and then they would be able to connect with us and we could verify via phone or whatever and establish eligibility and then make an effort to get our staff to those locals, especially for the National Farmworker Jobs Program where we're considered a statewide grantee.

Now, this was a very scary situation in a sense because, when we do have limited dollars, we thought we were really going to be targeted to access those dollars immediately. But I can honestly say that the challenges that I believe we've overcome in our negotiation process is that everyone we negotiated with actually opened the door to us. And there were some areas that didn't request as much money as others, and there were some where we couldn't negotiate down.

But in return I believe we have now established partnerships that at first were challenging but now are beneficial in both directions. And I think that's what we went into the system hoping to achieve, even though we were confronted with challenges.

MR. MCMANUS: Thank you, Nita, for sharing your experience with the challenges that you did encounter in these negotiations. Similar to Kirk, I wanted to open it up just to see if there are any other panel members that had similar, perhaps different challenges that they had to address that popped up unexpectedly or any of our federal resources and partners that may have heard anything similar. Hearing none, I will now turn it over to Chanel for our next question.

MS. CASTANEDA: Thanks, Craig, and thanks, Nita. This question is to Brigid, Crystal, and Amy. What advice do you have for partners who are still negotiating their IFAs, which is the infrastructure funding agreement, what was previously called resource sharing agreements, as a part of the MOU process? Brigid?

MS. MCRAITH: Sure. Yeah. I'd be happy to respond. So I think for us there were – there are three pieces of advice that are pretty simplistic but I think were essential for us in the process.

One is finding and building a high-level ally within the local workforce system, someone who understands our work and there establishes a better sense of openness to negotiation once they understand who we are and what we do. In some cases we even – if we didn't have one – at a certain board level that we needed, we reached out to staff, to board, and community partners to really open the door for us as a team to establish the relationships we needed, and that's helped a great deal.

The second piece I would offer is not to hesitate to ask for what you want and need in the MOU process. There were several different points for us, but one example is wanting to have easier access to employment data through the Office of Workforce Development, and through discussion and negotiation, we were able to get that included in the MOU and create more opportunities for win-win between the two partners.

And then finally, I would just share that I think to stick with it. On top of – as I mentioned earlier, on top of all the changes with WIOA, our local offices have undergone really significant changes that have kind of left us at times feeling like we're walking in a dark fog and not really sure where to turn.

But we've remained patient and persistent and been comfortable in the cumbersome nature of it and the often confusing language. Just asked questions and really tried to push on to the next stage. For us the documents were long, legal. They were often changing, and just making sure we're really clear on what we're agreeing to and where we can find common ground.

MS. CASTANEDA: All right. Thanks, Brigid. Crystal, the same question. What advice do you have for partners who are still negotiating their infrastructure funding agreements?

MS. PERRY: I'm not sure I have a whole lot to add to what has already been said. I think that, as we know in any business or any type of work like this, relationships are key, and ensuring that the folks who are actually doing the negotiating have relationships with the folks on the ground we found to probably be the most successful thing that we did during the negotiating process so that, if we had to make calls to folks, we actually knew who we – could put a face with a name, knew who we were speaking with and I think had a lot more respect for and by the folks.

MS. CASTANEDA: Great. Thanks, Crystal. And, Amy, same question. What advice do you have for partners who are still negotiating their infrastructure funding agreements?

MS. JUDD: Thanks. I really appreciated what Brigid had to say about finding a high-level ally. We had in our local, our regional environment, our workforce development board sort of convened all of the partners, and that was a big help. But on a more day-to-day level I think that you really have to look around you and examine what value your agency is bringing to the table.

And, unfortunately, sometimes you have to realize also that your partners may not fully understand all of the moving parts of your day-to-day work, and you have to do a little bit of education. We talked about silo busting – (bursting ?) at the beginning of this webinar.

So I think we all get caught up in the incredible workloads of our daily jobs, and we forget to – sometimes we make assumptions about those things. But know that there truly is added value to your contribution to infrastructure costs. In an ideal situation the sharing of resources really should help your agency.

MS. CASTANEDA: Thank you, Amy. I'd like to turn it over to anyone else on the panel that would like to answer the question. What advice do you have for partners who are still negotiating their infrastructure funding agreements?

MR. BUTLER: I'll jump in. This is Brandon. I would say that the one thing that I kept really trying to hammer home with our partners at both the state and local levels is that the terms relative benefit received and proportionate use are really can – can be terms of relationship, can be terms of agreement that, quite frankly, shouldn't be used to beat each other about the head but to really be used as to find that common ground.

What I kept trying to go back to our locals that were having issues in coming to agreement was, essentially, take what you can that makes sense for you because this is the first year in doing this. Have your partners then – because next year you're going to build on that relationship.

You're going to increase the ways that you can collaborate together, and ultimately, you're going to be better for it, and you're giving that value back to their program. They're giving value to yours. So using those terms, the relative benefit received and proportionate use, really try to come together in an agreement because this year is year one. You've got a long relationship ahead of you.

MS. CASTANEDA: Thank you, Brandon. That was really helpful. Is there any advice from the – our federal resources that we'd like to provide for the audience who are still negotiating their infrastructure funding agreements? No? OK. I'll turn it over to Kirk for the next question.

MR. LEW: Hello, everyone. It's Kirk Lew again, and I think our panelists set this next question up perfectly and we're really going to start looking at the benefits to joining the One-Stop or the AJC system and how that benefited each of the programs. So there's two parts to this question, and we're going to direct thee questions to Brandon, Nita, and Amy. Nita, we'll start with you first, and here are the two questions.

What benefits did the One-Stop offer your program to help provide the public with access to your program? That's question one. Question two is, describe your local area's process in bringing partners to the table. What benefits or buy-ins did the One-Stop offer to local area partners? Nita, why don't you take that question or those questions?

MS. D'AGOSTINO: There are a lot of questions. I want to say that one of the things that did happen is that – and that is a benefit is that in most locations we were asked to submit several eligibility determination informations and pictures that went into videos at the local One-Stops so that all those required partners were able to have their programs visualized and accessed with information. Secondarily, we also made an effort to move some of the information into the Spanish language, which was not only a benefit to our organization but also to those who may be language barriered inside those One-Stops.

I think another benefit was that we became part of an integration process where we were able to cross-train other partners so that they would understand what our area of expertise was and we would know what their area of expertise so that those individuals at the table with those varied areas of expertise had the capacity to access people because everyone within the One-Stop understood what those varied programs were required to do.

One of the things that I think was unique, because when you deal with multi-barriered populations as WIOA has requested that we target, often they come to the table with barriers that may include homelessness and other support service requirements in order for them to better prepare for employment.

And in one particular One-Stop there was a connection with a United Way Stability Center, which then took the stress off of workforce development professionals could deal specifically with getting people jobs because there were others who were working on building those partnerships to access those required support services. I think those are where some of the benefits were really beneficial to us as an organization.

One of the things that did happen – I'm going to target Pennsylvania specifically – is that how we were brought to the table initially is, because of our conversation at the state level, they then developed a template that went to all of the One-Stops that said, who is your partner in your local community for YouthBuild? Who is your partner in your local community for your Senior Community Service Employment Program? Who is your NFJP provider?

And once those targets hit the local One-Stops, they then in some cases researched us and reached out to us and had us come to the table to educate them on what it is we did and how we fit into the One-Stop system. So I believe that, though there may be others out there who may not see all of this as a benefit, unless you open the door to some of the partnerships that are within the One-Stop system that can benefit your overall programming, then you may be hindering yourself. You have to develop these partnerships in order to be able to assure that your participants are served.

All of us have varied interests and goals, but I say this because Pathstone as an organization has over the last 40 years or more provided services specifically to multi-barriered populations, and WIOA stipulates that, whether it's a disability or a farmworker, that you have to come to the table and tell people what it is you know how to do because often you'll be surprised how many people don't know what you do. So this is where the benefit comes in, educating your local community on the services you provide.

MR. LEW: Thank you, Nita. That's great advice to help people understand the importance of building their internal and external capacity. Amy, would you like to take that question – those two questions now?

MS. JUDD: Sure. I think that the biggest payoff for my program has just been greater visibility in the community. There's a lot of traffic in the One-Stop. So by virtue of that, we are seen, and I really believe there's a better delivery of comprehensive services to clients among partners. In my case there's been a great deal of bang for our buck.

In Virginia adult education programs are regionalized. There are 22 regions, and I serve six localities. And if you look at the map, I'm at the tip top of the state in a nice little skinny geographical area that runs the state – down the state border. It's very hard to operate a regional program from a central office, and we do have a regionally headquartered office at the community college where I am now.

But what I found is in the One-Stop I'm able to afford rent for a very small cost for an office. If – it's very reasonable for us, and it puts us front and center with our partners. We're right upstairs from the Title I provider, right next door to the Virginia Employment Commission, and we can take advantage of shared spaces in that locality.

If you had asked me five years ago if I was considering an office in the city of Winchester, which is at the far northern end of my region, I really wouldn't have imagined that it was a practical possibility. So there has been sort of a silver lining to this big project.

MR. LEW: Great. Thank you, Amy. And, Brandon, would you like to take these two questions as well?

MR. BUTLER: Sure. And I think Nita actually brought up a fantastic point. WIOA holds at a premium providing services for those jobseekers that have multiple barriers to employment. And what better way to really talk about partnerships than really focusing on those barriers to employment and bringing in your partners that have a subject matter expertise.

For us, again, as one of the few states that included TANF as a combined plan partner, it was, quite frankly, a difficult conversation at first to have because both the TANF providers, the local Departments of Social Services, as well as the local adult education providers in which adult education also programmatically resides within the division that I help oversee, the rap that Title I often got and for better or for worse was they didn't serve, quote-unquote, "our customers."

And so one of the ways that the, again, local planning and then MOU formulation and the infrastructure cost arrangements really provided was that level setting for our various partners within the local areas to come together and, in some instances, to even sit down and formulate one-pagers that serve as desk guides for all of the partners to realize, hey, this is what vocational rehabilitation actually does; this is what the vets program actually does; this is what the DSS office can provide through their flexible funding through the TANF block grant.

And so it really provided that opportunity to have a more robust discussion, and so I think that has been the overall benefit of this whole process.

MR. LEW: Thank you, Brandon, Nita, and Amy, for your perspective. I want to open that up to any of our other panelists or federal partners, if you have any input for these questions. OK. I'm going to move it to Craig.

Craig, why don't you ask your question?

MR. MCMANUS: Thank you, Kirk. So with the understanding that with the passing of WIOA there may be new partners that participated in a local One-Stop areas, and so this question really is – couple facets to it. One is whether or not there were any new partners to the local areas that joined your local One-Stop system and whether or not your organization was one of those new partners to the One-Stop system and what that experience was like in the negotiations. If we could start with Amy, that would be great.

MS. JUDD: Sure. I wouldn't say that my agency, adult education, is new to the One-Stop system. In my locality with the current Title I contractor, though, it is and at this particular location. Under the Workforce Investment Act I frequently held classes at affiliate One-Stop systems – sites – I'm sorry – but it has been quite a while, and things are new and exciting with WIOA.

I don't know that we necessarily have new to the local area partners, in the global sense of that term, at our One-Stop, but to echo what Nita and Brandon spoke about in terms of supportive services, we have a really interesting One-Stop location. It's on a larger community agency campus that houses various service providers that reach far beyond the WIOA service model.

And I think there are 23 or 24 agencies on the property, and it's also convenient to public transportation and other government agencies that weren't able to collocate. The campus is actually an entity called Our Health, and it's a division of a sizeable regional hospital and healthcare provider system.

So when we talk about one-stop shopping for our clients, they're really benefitting from access to title partners but also organizations like a free medical clinic, a mental health advocacy organization, a housing organization that's dedicated to assisting adults with intellectual disabilities, and so on. So all of these agencies are able to provide help to clients who present with various barriers to workforce success. And that may fall outside that traditional role of our WIOA partnering agencies, but we've built a true network of support services that are easy to access.

MR. MCMANUS: Thank you, Amy. That was – yeah – definitely very interesting, the resources that you have available at that location. Any of our other partners experience new partners within the local areas that they were responsible for? OK. Well, hearing none, I will turn it over to Chanel to ask her question.

MS. CASTANEDA: Great. Thanks, Craig and Amy. This question is to Brigid, Crystal, and Nita. What are the most beneficial things to come out from your negotiations?

MS. MCRAITH: This is Brigid, Chanel. A lot of these things I've mentioned, but for us the most beneficial has been strengthen relationship building with our local workforce centers, definitely an elevated understanding of who we are and the services we offer, which many have commented on, and I'm hopefully anticipating the door being opened to intensifying the partnerships that exist. So opportunities for co-enrollment and for active effective partnership strategies are really just starting to take shape right now.

MS. D'AGOSTINO: I think one of the things that happened with Pathstone – this is Nita – is that we had several One-Stops who knew nothing about our organization tell us that they were so surprised that we were a gem in their location and maybe never would have realized that we were in their local communities. We also were a gem to them because we're an organization that is accustomed to doing outreach and working non-traditional hours, which often can be a detriment when someone might be wanting to access new employment.

So we actually set up systems so that the One-Stops would understand what our local targets were, and I think that was a benefit. But over and beyond that, our experience has been that, because of the expertise we brought to the table working with multi-barriered populations, we were able to access not only a One-Stop operator for a local workforce development board. We were awarded multiple TANF programs. We were awarded a One-Stop youth Title I program.

So many other things have happened that I believe we as an organization have benefitted while the One-Stop has benefitted by our expertise with these multi-barriered populations. I think it also gave us the opportunity to meet other partners that, as you well know, as dollars dwindle, having people provide services in their specific area of expertise really benefits everyone and then assures not as much duplication as we have seen in the past.

MS. CASTANEDA: Thank you, Nita. And, Brigid?

MS. MCRAITH: Hello?

MS. CASTANEDA: Yeah.

MS. MCRAITH: I have already shared.

MS. PERRY: It's me. It's Crystal.

MS. CASTANEDA: Sorry. Sorry, Crystal.

MS. PERRY: No worries. No. I just was going to give a little information about what happened and what our small successes were. We had a local person present as well as myself at all the negotiations, and that helped because the local folks were always the ones who had actually been working with the workforce boards all along, and I was just there to make sure that we were meeting the regs and accessibility issues.

But the thing that was nice is in between and after the local negotiations, the state level folks such as myself would review proposed MOUs and IFAs, and then around May we had to ask the local folks to send assurances to the state with our signatures too that we have reached agreement, especially with the MOUs.

And we were very close, but had we not had the local relationships and had the ability to pick up the phone and call and troubleshoot along the way, I think we would have – we wouldn't have met our deadline. We met it with 18 out of the 19 by July 1st. And of course the places where folks had been working together already it was helpful. We have some collocations of our VR offices. So those were sort of already done for us, but I think that's probably my two cents on that issue.

MS. CASTANEDA: Thanks, Crystal. And I just – before I turn it over to the rest of our panel members for this question, I just want to re-echo Nita's thoughts about – she's correct. When dollars are dwindling, WIOA and negotiating your MOU and your infrastructure funding agreements is an opportunity to identify where you could cut costs and identify where – if there is duplication of services, how can you leverage another federal partner in order to have your One-Stop provide the full services that it needs.

We all know that – we definitely all know that there's not more money that's coming into the system. So we have to figure out ways in order to make the system work for us and what will be in the future. So I think Nita was correct, and this is a time. It's a new law. It's a new time for innovation. So this is a time definitely to figure out ways to be more innovative about the process.

So with that I just want to turn it over to anybody – any of the panel members. What was the most beneficial thing to come from your negotiations? No? OK. So I'll turn it over to Kirk for our next question.

MR. LEW: Thank you, Chanel. So this is a question just for you, Crystal. We know we just heard from you but we're going to ask you another question and that question is, what strategies did partners in your local area employ to reach consensus in negotiating the MOU and/or infrastructure costs?

MS. PERRY: Well, in nearly every negotiation it was clear that the core partners – we knew how important it was to get as many partners to the table as possible, and in a lot of areas, especially our more rural ones, there would be some partners who were very unfamiliar with the process and who had no idea sort of what we were doing, if you will.

So we actually worked with them and did as much troubleshooting as possible. We'd connect them with their state counterpart. We'd provide technical assistance to the extent that we could because we were really focused on not walking away until everyone felt like they had a piece of the pie, if you will, that not only were – most folks came to the table going, why do I have to pay for something I never had to pay for before?

But we wanted to make sure that they felt like they were getting something out of it, and the benefits to our customers were going to be multiplied by having everyone's participation there. So we – like I said, we did a couple of negotiations at the table, and then we just kept hammering away until we could figure out what it would take to get folks there.

MR. LEW: Thank you, Crystal. So it looks like you guys just persevered and got through –

MS. PERRY: Yeah.

MR. LEW: – the process as best you could.

MS. PERRY: Yeah.

MR. LEW: Is there anyone else that would like to take – from the panel that would like to take that question on or a federal resources? OK. We're going to keep on moving, and I'm going to hand it over to Craig. Go ahead, Craig.

MR. MCMANUS: Thank you, Kirk and Crystal. And we talked a little bit about benefits to the process, the negotiation process itself. This question really is more geared to how a partner would see themselves as benefitting as a partner within the One-Stop system. So perhaps we can start with Amy for that question.

MS. JUDD: Sure, Craig. I think we've all said this, developing relationships between agencies. In the long run I think it can help us sustain our grant funding in my situation, and that can be done because our agencies are making affirmative referrals to one another. We know our clients need wraparound services. Rarely do you find an underemployed or unemployed or unskilled worker who doesn't need more than just a new job or a first job. They need more than that, and I think there's a lot to be said for pooling resources. I can give an example.

At the One-Stop that I've spoken of that just opened, we're about to work out an arrangement and a process between the Title I and Title II providers where adult education Title II will be responsible, hopefully, for all academic assessment of Title I participants as they go through the eligibility process.

Makes perfect sense to me, but we hadn't been doing it in the past. But we're there together and now we can talk about this and I think that adult education in this case brings to the table subject matter expertise on delivering and interpreting these assessments, which we all have to do anyway, and we're providing a service to our Title I partner.

And that Title I partner may benefit in the long run because as they're referring clients to trainings, they know what that client is capable of, and hopefully, in the end of the day the outcomes for their participants may well be better. At the same time my program may get more referrals as a result of this partnership. So while this speaks more to shared and career services as opposed to the IFA topic today, it is at the heart of our mission as One-Stop collocated partners.

MR. MCMANUS: Thank you, Amy. Same question to Nita. How did you see the benefits of being a partner within the One-Stop system?

MS. D'AGOSTINO: I'm going to go back to what I've said, and that is that, again, competition for dollars in workforce development, it is dwindling. But a lot of the federal projects that are put out in order for organizations or states to bid on require that you have other partners other than yourself and require that you have a letter of support from your targeted local area, from your One-Stop.

And so you have to build those relationships in order to get the support letters that may be required inside your local communities across the board. I say that because I believe that one of the greatest benefits has been that there are others now inside the One-Stops that understand that Title I is not just the dollars that are filtered federally to our state and then handed through the One-Stops.

There are other Title I partners who bring a specific expertise to the table and that we're opening doors every day for the One-Stops to have a different view from their community that everyone is welcome to come there no matter what your barrier, if you're just disabled or if you're an immigrant population or if you're a mature worker, people that have maybe gone through the process in the One-Stop and maybe felt alienated.

I think WIOA at this point in time is not only benefitting us as an organization and integrating within the One-Stop system, but it is also, more importantly, opening the door to the participants we're required to serve through our funding. And I think we can't lose sight about who those participants are and do they feel welcome in the One-Stop.

So I think bringing different areas of expertise to the table and opening that door is really what's going to make a difference, and I think together, if we evaluate it from that perspective, we can all make a difference.

MR. MCMANUS: Thank you, Nita, and thank you, Amy, for your insightful responses to that question. Do any other partners want to mention anything about their views on the benefits of being a partner within the system?

JACQUI SHOHOLM: This is Jacqui Shoholm, one of the federal resources, and I would just like to say that those two individuals that just provided the benefits from their perspective really capsulized the vision, as far as I'm aware, for WIOA. And this legislation will be around for a very long time. These partnerships will evolve over time, and the benefits will become more and more apparent as we continue to work well with each other in partnership. So I just commend you for getting the gist of what WIOA is intending to do and, certainly, on behalf of the participants that you're both serving in your local areas. Thanks.

MS. JUDD: Thank you.

MR. MCMANUS: Thanks for pointing that out, Jacqui. Jacqui, I think I'm turning it over to you at this point to follow up with some additional questions.

MS. SHOHOLM: OK. We have just two additional questions. The first one's kind of long but it's an important one and it's directed to Crystal. We're interested in knowing whether your governor issued guidelines for determining partner infrastructure cost contributions.

In other words, did the state workforce agency or the governor's office provide some parameters for identifying either cost allocation methodologies or identifying what infrastructure costs would be? And as a second part of that question, did you receive timelines for when these things had to be put in place?

MS. PERRY: No to the governor issuing guidelines or partner roles or guidance. Workforce development did that with our – it was all the core partners but primarily from workforce development.

We did shoot for, actually, all the IFAs, even though they did have the – until January, most of them actually reached agreement on the IFA by the July 1st deadline as well. Our Department of Labor did a lot of work to support our One-Stops in reaching that so that we did meet the deadlines, and because we had 19, it was kind of tough.

In addition, the only one that we did – we had one that we had to notify the governor about, and our workforce development agency, who had stayed out of the local negotiations for this very reason, has been working with that one area to get that done for the governor's office. We really didn't have a timeline issue. Fortunately, they got them all done. It might have been by midnight on June 30th, but they did complete them.

It did seem to help that we put the – I can't even remember when it was – mid-May request on them to give us an idea whether they thought we would reach agreement or not, and that gave them two more months. That seemed to really help push things along, if you will and gave us ideas where there was an – was not agreement so that we could go back and try to work on that. So yeah.

MS. SHOHOLM: I think the guidance that we'd issued on this topic does encourage the state to set a deadline ahead of the beginning of the program year by which the local areas have to come to agreement. So you're stating that that did work well in your area?

MS. PERRY: Yeah. It did.

MS. SHOHOLM: The state of Georgia?

MS. PERRY: For the most part. Yeah. Yeah.

MS. SHOHOLM: OK. OK. Great. And, Amy, were there a variety of types of cost allocation bases agreed upon in your area negotiations, or was there a set formula put forward?

MS. JUDD: Well, as I stated before, we're brand new. Our center literally just opened its doors. What it looks like is we'll be using a proportionate square footage calculation for collocated partners in compliance with the proportionate use relative benefit received requirement in Uniform Guidance.

And partners that aren't able to be physically collocated will still receive the benefits of the center as their clients use the One-Stops resources and services, such as our resource room for employment searches and such, and that will be considered a direct benefit to those non-collocated partners. And then those partners will provide in-kind service in proportion to the relative benefit their agency has received from their clients' usage. So that's where we are at this point with our very new situation.

MS. SHOHOLM: Well, and the – a segue on that is that you will be required to reconcile your IFA agreements at various points in time as we go into the future. So you'll be able to make adjustments when – whichever allocation basis you decided on, whether it's working well or not.

MS. JUDD: Yes. And our current MOU draft specified that review period.

MS. SHOHOLM: Great. Thank you so much. Anyone else want to contribute to either of those questions, whether the governor or the state workforce development board issued guidelines for determining partner cross-contributions and whether there were a variety of cost allocation bases suggested to you?

MR. BUTLER: Yeah. Sure. I'll jump in. This is Brandon. In Maryland we had a joint policy that was issued between the three state agencies that make up our workforce system, so the Department of Labor, the Department of Human Services, and the Maryland Department of Education, and that policy also then went to the governor's workforce development board. It outlined when – it outlined the deadlines upon which a infrastructure cost agreement must be in place and also an MOU must be in place, and it also provided a mechanism upon which the – a dispute resolution process would be triggered.

And so we had all of that in place. Fortunately enough, we did not have to employ that. We did have one local area that came very, very close, but before that process was actually triggered, they came to an agreement. And so we were very fortunate that all of our local areas all reached agreement on their own.

As for cost allocations, most of our local areas, we did leave it broad to – and basically made the reference only to the Uniform Guidance that there are certain allocations that are preferred, including things like square footage and participant count. However, we left it to the – as a local negotiation point. Interestingly enough, though, most of our local areas did use that square footage.

MS. SHOHOLM: Thank you. That's very interesting. OK. I'll turn it back to you, Chanel.

MS. CASTANEDA: Thanks, Jacqui, and thanks, Crystal, Amy, and Brandon, on sharing that. Before we turn it over for Q&A, there's just one final question I wanted to ask all the panel members. What do you think is the most valuable aspects of the relationships formed during this whole process, and what are some new innovations that have come out from this partnership? I'll turn it over first to Brandon.

MR. BUTLER: Sure. I had a local workforce development executive director come up with the question, and I've been using it frequently now, of when can we get past all of this compliance stuff and actually start innovating?

One of the things that has really been a new innovation that's come out of the partnerships that have been formed throughout this process and, quite frankly, is better because of this process is we at the state have now been able to work with our various state level partners to put out a grant funding opportunity utilizing the governor's state set aside to now start putting out a series of what we've been calling demonstration grants for targeted intervention.

So our first one, we've put out $1 million for a career pathways grant so that our local areas could choose from a menu of options that is really testing out those partnerships that they formed through this process. So I think we have a lot of great things brewing in Maryland, and I think we're better for it because of the process that we just went through.

MS. CASTANEDA: Thank you, Brandon. Nita, same question to you. What do you think is the most valuable aspects of the partnerships formed during this process, and then what new innovations have come out from these partnerships?

MS. D'AGOSTINO: Mine is probably limited in that I think awareness of what all new partners within the system are doing and how those programs can actually integrate more effectively. With awareness, I think we've been able to understand what other people are doing and be better connected in our local communities. So I think that's one of the most valuable aspects.

When it comes to innovation, I want to say that we have looked at how do we assure that people who typically wouldn't come into the One-Stops do. So we've started evaluating are we going to operate more extended hours? Are we going to be open at least or two days a week from 6:00 to 9:00, particularly for people who are underemployed who can't afford to take time off during the day because they're not going to be paid?

They don't have that luxury of taking vacation time and being able to access services that at a more convenient time. I mean, you know that 8:00 to 4:00 kind of day may be a thing of the future for some of the targets in our communities.

I think another innovative thing that we've just recently come up with and that's in particularly in the One-Stop that I oversee, and that is we're looking at how do we bundle certain trainings, for example, let's just say resume, mock interviews, cover letters, those things, into a bundle so that those who can come one night a week during a monthly time frame can actually access those services on a continual basis but it's not a repetitive basis? It's kind of like a bundle that they can access all four things in a particular time frame.

So we're all the time looking at innovation and how to assure people who typically don't come in will come in and how we can assure that they become people that will go out into the communities and say, I got a great service at the One-Stop, and I was able to hear about other programs who were partnering there and getting it all in one place. But I would say that is probably part of innovation but also a benefit.

MS. CASTANEDA: Great. Thank you, Nita. Same question to Amy. What do you think is the most valuable aspects of the partnerships formed during the process, and what new innovations have come out from these partnerships?

MS. JUDD: I think just having to constantly stay in communication with your partners, we're doing pretty well with that before we were collocated, but now, I think we're doing much better. And we can jointly lead the charge on how to mobilize our not collocated partners, and that's been a big help in terms of innovations.

And similar to Nita's response, we are working right now on developing employment workshops as a team. We've also pulled in other community partners, and each agency has taken on a subject in this presentation process. And so everyone has a little skin in the game and everyone's getting a benefit because of referrals and we're all taking part. And the economy of that I think will be really interesting to see over time.

MS. CASTANEDA: Thank you. Thanks, Amy, and same question to Brigid. What's the most valuable aspects of the partnership form, and what innovations came from these partnerships?

MS. MCRAITH: Yeah. Thanks, Chanel. So as a workforce development focused non-profit, these relationships are just essential to our day-to-day success, not just in terms of the One-Stops and WIOA but really across the board. So we've really utilized this as a way to further strengthen those partnerships.

And for us, as Denver's One-Stops are really just getting established, it's been really helpful to be at the table and the discussions and to be able to advocate for the young adults that we serve, to be able to bring in additional ideas and perspectives into service delivery, and to be part of a collaborative venture. So I think that's been incredibly valuable for us.

As we're just starting to see innovation occur at our local level, given all of our local transition, I'm really hopeful that a lot of innovation can come from these partnerships, things like streamlined services and increased accessibility for out-of-school youth for me is of utter importance at the local level.

Obviously, leveraging resources, which many have mentioned, strengthen partnerships, and improved communication among networks that are serving the same populations. Even having new strategies for information tracking and resource sharing will improve service delivery for our clients, and that's critical, if we're going to be able to move the needle on missions that are so important to all of us.

MS. CASTANEDA: Thank you, Brigid. And, Crystal, we'd like to hear from you on what new innovations and valuable aspects of the partnerships formed.

MS. PERRY: I think probably for our agency, which is true for any VR program, is that we have now opened the door, I think, to the other core partners working with our clients in ways that they may not have before. I think the traditional process of anyone coming into a career center who apparently has a disability has been referred to VR.

Our intent is hopefully that that's not happening and that individuals with a variety of types of disabilities are actually going to be able to avail themselves to the other services offered at the One-Stop and with our support making those accessible. We've done some training at our One-Stops and are continuing to do so, but not only are we doing this training because we have to.

They're actually calling upon us and asking us to do so, and I think that that is probably something new that would not have happened had we not had to sit down and do the negotiating. So it's been positive.

MS. CASTANEDA: Great. I think that's the overall message that everybody has been giving, that like everybody out in the audience, I'm sure our panel members had to go through a lot of blood, sweat, and tears.

But at the end of the day they do see a benefit to this whole process and that hopefully the benefits will continue on in future years and like Jacqui said, that these are relationships that are formed and these – they are going to be around for many, many years to come. So we hope – yes. Everyone had a rocky start in the beginning, but hopefully as we continue with the years down WIOA, that the benefits will be reached by each of the local areas.

We have about 30 minutes left in the webinar – or I'm sorry – in the virtual roundtable. So we do have a couple questions, and I will turn that over to my colleague Susanna who will moderate over the questions from the audience.

SUSANNA TROXLER: Hi. Thanks, Chanel. And we've really gotten a lot of excellent questions, and I just wanted to say that we all really appreciate how engaged you all have been as an audience. So let me get started.

OK. Here's our first one. "If a required partner has not been contacted by their local workforce investment area, should it reach out or wait to be contacted?" Jacqui, could you take that one?

MS. SHOHOLM: Sure. I would say to definitely reach out because, by virtue of being a, quote, required partner, end quote, you need to be covered by an MOU, and you need to have that in place by January 1st, including an infrastructure funding agreement. So you could go forward to the local board or the local operator of the One-Stop system in that local area, but definitely don't wait to be contacted because the deadlines are set in policy.

MS. TROXLER: Thanks, Jacqui.

OK. Here's our next one, and this one looks like it's probably specific to a particular state. "The American Job Centers received a formal policy issuance from the state pertaining to the deadline to complete the MOU. While the deadline was September 1st, 2017, the policy issuance was not submitted until September 12th. The state is requiring the IFA agreement to go back retroactively to July 1st, 2017 when no guidance had been provided.

The federal TEGL has given us until January 1st, 2018 to complete the MOU process, and I'm wondering if the state has the statutory authority to mandate the July 1st, 2017 implementation date." And then a comment. "Unfortunately, the IFA process is discouraging the goal of collocation and collaboration instead of encouraging it." Craig, would you like to tackle that one for us?

MR. MCMANUS: Sure. I'll give this one a shot, Susanna. This one, there's a lot of moving parts here, clearly, and I think the – I would do it injustice in trying to address all the specifics here without having additional details related to what this policy issued and what the language looks like. But I think what we want to sort of reiterate here is what the framework is.

The MOU itself actually did have to be in place by July 1, 2017 for the local areas for program year 2017. Now, while the IFA is a component of the MOU, it was the departments looking at the transition authority to be able to provide an extension to implementation of the IFA through January 1st, 2018.

Effectively, what we said in this TEGL or the TAC or program or information memoranda, whichever the federal partners had put out, was that this extension was really in place to allow the local areas additional time to negotiate and reach consensus on their One-Stop partner infrastructure funding.

However, the guidance was clear that the governors do – it is under their purview to be able to require a final IFA to be implemented any time between July 1st, 2017 and January 1st, 2018. The guidance was also clear that during the time of the extension, local areas may choose to use the funding agreement that they had in place from program year 2016.

So those are the general parameters of what is required, and I think in able to – or in order to be able to provide a more specific response, we would encourage the person that answered – or asked this question to reach out to their federal cognizant agency and to maybe channel it back up for a more specific request.

MS. TROXLER: Thanks so much.

OK. Next one is, "During the MOU process, how much negotiation power did the state level leadership provide to local areas?" Brandon, would you be able to give your point of view on that question?

MR. BUTLER: Sure. And this was really based out of – back to the point that was made earlier, that the infrastructure funding agreement is a part of the MOU and the local parties are – were the parties to the MOU to begin with. And so from a state level we really attempted to provide our local areas and the local partners with the negotiation power.

We had our labor exchange administrators at the state level that are at the 30 American Job Centers that we have statewide really be the ones at the negotiation table. And so the state ended up being more of a facilitator of discussions and then ultimately reviewed the infrastructure funding agreements but really we tried to provide a lot of negotiation power at the local level and it's – it allowed our local partners to know how much they were a valued partner at the table in this.

MS. TROXLER: Great. Thank you, Brandon.

OK. Next one is, "What's a good strategy for keeping partners from thinking they're being mau-maued by the Title I WIOA program? For example, being required to partner and then charged for joining the partnership." I think I just learned a new word. I'm going to have to use that. Jacqui, would you like to get to the meat of that question?

MS. SHOHOLM: Yes. I'll attempt it, anyway.

MS. TROXLER: Thank you.

MS. SHOHOLM: I think what this is referring to is the Title I partners are the formula funded funding streams, the adults, dislocated worker, and youth funding streams, in addition to dislocated worker grant funding streams, and they are core partners. There's also adult education.

There's also rehab services administration. But I think by focusing on some of the things that have been mentioned, particularly by Amy earlier and Crystal, are the benefits received by partnerships, putting the emphasis on what they will gain by becoming a partner in the system and a collocated partner in the system, in terms of enhanced career services, which are broadly available across all of the core partners and in terms of affirmative referrals, I think was a term that Amy used.

And I think once you are able to make that case, articulate that case but then also demonstrate it through the application of your allotment strategies, your infrastructure methodologies, people will begin to see that they are only being charged for – in proportion to the benefit that they receive by being a partner in the AJC. And that, again, will be reflected over time. It needs to be reconciled every year so that it's a true reflection of their participation, and I – from what we've seen in some local areas, we think it will be apparent very quickly what the benefits are.

MS. TROXLER: Great. Thank you so much.

Lekesha, would you like to take over reading the questions for a bit?

LEKESHA CAMPBELL: Sure.

MS. TROXLER: Thank you.

MS. CAMPBELL: So one of the questions we received, and I'm going to direct this one to Chanel, "What are effective ways to track the RSA IFA resource commitment?"

MS. CASTANEDA: Thanks, Lekesha. I just wanted to point out we had a WIOA Wednesday a couple – about six months ago in June. It was actually part three of our infrastructure webinars. We actually had the state of Wisconsin demonstrate their cost database. Wisconsin was very active in pretty much leading the charge in helping their local areas track the resources that they were going to share, negotiate with.

So they had actually developed a database to track these costs at each of the local areas, and Wisconsin has been very nice to share this database to other states and local areas. They've done many demonstrations to these local areas. They've actually also given the platform or the program that's being used to these local areas to help track budgets, to help track costs, to help track resources that were being used as well as allocation methods that were being used, the various allocation methods.

So if you go to WorkforceGPS, you want to search Wisconsin or put in the words Wisconsin cost database or infrastructure part three. Any of those words will bring up the archived webinar we had, and also we actually included in the PowerPoint the contact information to the state of Wisconsin on if you're interested in getting a copy of the program they use in order to track their resources at the local level.

So I totally suggest looking at that webinar. Please go through it. They've also had some PowerPoints. They also shared the screen of the system so you could actually see them actually using the system. And if you're interested, please reach out to the state of Wisconsin, and they're more than happy to help out other states and local areas in tracking their resources during the whole negotiation process. So I'll turn it over back to Lekesha.

MS. CAMPBELL: Thank you, Chanel.

So the next question we received is actually specifically for Crystal. This person said, "I'm interested in hearing what services the vocational rehabilitation staff in Georgia have agreed to in their MOU negotiations within the 19 career centers." Crystal, do you want to answer that one?

MS. PERRY: Yeah. As far as services go, we agreed to provide intake, anything from application through some – we have agreed to do some career counseling on-site at the One-Stop. Keep in mind we have anything ranging from that is our full-time location for a particular office to complete digital presence, which just means that individual – customers of the One-Stop can come in and get direct access to us via telephone or Skype, and we have that in both – excuse me – a phone booth type setting as well as private offices for our folks with disabilities. We provided a list of services to each local workforce development agency, and that is in each MOU.

And I guess I could get that for the group. I know we're going to be putting together some materials, and I'd be glad to provide that.

MS. CAMPBELL: Great. Thank you.

We have another question that kind of goes back to Amy, your discussion about some of the – how the MOU negotiations were taking place, and you covered some of this in one of your early questions. "How did you determine how much money you would pay for rent?"

MS. JUDD: OK. So our location is leased to our workforce development board by a local real estate person, and then adult education and the Virginia Employment Commission in our site are sub-leasers and then Title I is a contractor for the workforce development board. So I don't know the details of their arrangement. However, we looked at a square footage calculation. In my case, I rent an office space, which includes internet and the basics of operating an office, and then I also contribute to shared space, which includes conference rooms, a kitchen, that kind of thing.

MS. CAMPBELL: Thank you.

MS. JUDD: You're welcome.

MS. CAMPBELL: We received a question that said, "Will samples of successful IFAs be shared?" And, Chanel, do you want to respond to that one?

MS. CASTANEDA: Sure. I'm not sure – hopefully, everyone has seen it. We actually have a sample MOU and infrastructure cost toolkit that's on WorkforceGPS. About a while ago we had collected a number of MOUs and RSAs and IFAs from our local areas and pretty much picked out the best of the best.

And so we created – the departments came together and created this hypothetical local area that was going through the negotiation process and created this hypothetical sample MOU and infrastructure cost toolkit. Within that sample MOU is a sample IFA, as well as a One-Stop budget. If you look to – it's on the WorkforceGPS. You want to just search in the search box sample MOU and infrastructure cost toolkit. It will bring it up.

It will also have all the calculations and spreadsheets that were used in this hypothetical situation of the cost allocations that were used in order to allocate costs amongst the required partners and additional partners in this hypothetical local area. So all the cost allocations and partner contributions are attached in the sample MOU and infrastructure cost toolkit.

If Jen could put up the link – let me see. Hopefully, she has found it. Let me give Jen the link to it. So if anyone hasn't seen it yet, we recommend it. It's a great resource to use while you're going through the process of negotiating costs.

So I totally recommend that as a resource to use as a successful IFA, and I'll turn it over to Lekesha.

MS. CAMPBELL: I think those are the questions that I have for now. We're still kind of sorting through some questions. So if anyone has anything to add while we're looking through this, let me know. That's all we have for now.

MS. CASTANEDA: All right. Thank you, everyone. We will turn it over back to Jen from Maher, and she'll close out with closing remarks.

(END)