**WorkforceGPS**

**Transcript of Webinar**

**SCSEP Transition Webinar #4: The Final Transition**

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JENNIFER JACOBS: Now I'd like to turn things over to our moderator today, Michi McNeace. She is part of the national SCSEP team for the U.S. Department of Labor. Michi?

MICHI MCNEACE: Thank you, Jen. Happy New Year, everyone. And again, welcome to our fourth transition webinar which we titled this time around "The Final Transition: To Go Boldly Where No Transfers Have Gone Before."

And the reason we say that is that sometimes I think that we feel that we're on the Enterprise and that we're traveling through this SCSEP transition galaxy. Either that or Judith probably thinks I just need to stop watching "Star Trek" movies, right?

But today we're going to go ahead and move forward. Today we're going to focus on our objectives, which are grantees' roles and responsibilities, challenges and contingency planning, transfers and SPARQ, final preparation for February 1, and of course the first 90 days after the transfer. And then we're going to open up for questions and talk about next steps.

And the reason that we've asked that you all dial in is because we really want this to be a two-way conversation, not just a webinar. So we'll be calling on you to kind of share with us some of the challenges or successes and things that are going on now. And we are really interested in learning about what's happening out there in the grantee world.

And I believe at this time Judith has quick updates that she would like to share, correct?

JUDITH GILBERT: I do. Three things, actually.

The first is that the TEGL that just formalized the numbers for January and February through June for all of the national grantees was published last Friday. Some of you may have gotten it if you're on the master list that the department has. But our practice had been always, as soon as a TEGL that's relevant to us was published, that we would send it out to you. We did not do that because, quite frankly, there wasn't anybody here on Friday to do it.

And we immediately discovered, however, that there was a couple of very minor discrepancies in some numbers. And so we're in the process of putting together – we have to – god help us – a change four TEGL that hopefully will be one page that will say, replace these charts with these new ones. We're working on them now.

Only two grantees were affected. Some numbers were inadvertently transposed or somehow came up wrong for NCBA and Urban League. I've talked with both of them directly and they're aware of it. And it was only in the state of Florida and in the state of Michigan. But the overall numbers were right and so our number-crunchers here are attempting to rectify the charts.

And so as soon as they're done, we will send them out to you so that you have the new ones, even – or the correct ones – even if the TEGL hasn't yet gone through the process.

Secondly, the additional transition funding for three-quarters of you who requested funding and were awarded funding. The email said that you would be literally getting the money in NOA in the very, very near future. I just want to give you an update from the grant officer. It looks like that's not going to happen quite as quickly as we hoped in terms of the timing, only the timing issue of when you get the NOA so that the – but the money is actually there already, I believe. No, it's not. It'll only be there when the NOA is issued, but you just have notice that these numbers are correct and that it's coming.

It shouldn't be an issue for any of you, I hope, because you – it shouldn't be a cash flow issue, anyway, because you do have funding through the rest of the year. You just – and we will attempt to keep you updated as soon as we have something firmer as to exactly when for you to be looking for the NOA.

And the last quick announcement is you should have – about 9 or 10 of you should have gotten an email yesterday about the redaction issue. Under the transparency rules that are in effect, any technical proposals and abstracts automatically get published, unless one requests a redaction of some proprietary information.

So we have to hear from you, especially if you have – say, no, it's fine; I don't have any proprietary info here that I want possibly redacted. But we've got to hear from you one way or the other. Or if you want a redaction, you need to suggest what it is. So the instructions are there and you have to be in touch with Irene if you have any questions about that.

So that's just a little quick heads-up. So that's it for my late-breaking news announcements.

MS. MCNEACE: Thank you, Judith. So we're going to open up the webinar with our first poll. And the first poll is, "Have you completed your participant meetings?" And we'll give it a minute and see what answers that are coming in. They're looking good. Right now it looks like a little bit – like – almost there; not yet, will be completed.

So a little over – sort of like 50 percent have completed. Some are going to have it completed by mid-January. OK. OK. So that gives us a better idea as to how many participant meetings have been completed. Right, Judith?

MS. GILBERT: Yep.

MS. MCNEACE: OK. So our second poll is, "Have you completed your host agency meetings?" And you can choose from, "What? We were supposed to conduct a host agency meeting too?" "Yes, yes, and yes." "Not yet, but will be completed by either January 13th, by January 23rd." And I have to say that we are very pleased to hear that everybody knew they were supposed to conduct host agency meetings.

So kind of the same consensus. It looks like there's still planning that these meetings will be completed by mid-January.

Any questions, Judith?

MS. GILBERT: No. I think we're good.

MS. MCNEACE: All right. Thank you. So we're going to move on to grantee roles and responsibilities. And Judith?

MS. GILBERT: This is just a list of things that are on here about making sure that participants are in the forefront about ongoing services and oversight; providing essential services to everybody that's still yours, even if you're a donor grantee for – come February 1st. Payroll, time and attendance, any issues whatever.

The overall goal of the – both the participant and host agency meetings, which you're obviously well on your way to completing, there again the really focus is that you're working jointly with the donor and the recipient grantee on these, and making sure that participants are reassured. That's really the primary purpose of these meetings; working out your details about all of the logistics, of course, and files and so forth.

File transfers is the next item. Making sure that the new grantee has all the information that he or she needs in order to provide good services to participants. You'll hear that participant focus all the time and I think that's where we are and we know that that's where you are also.

The other issues are – I want – Bennett is going to touch base on about the transfers and also something about performance. Bennett?

BENNETT PUDLIN: Thank you, Judith. I did just want to remind everyone that the donor grantees are going to remain responsible for doing follow-up for anyone who has exited prior to February 1st. It's really important that grantees make arrangements to do that. I know in some cases it will be a logistical challenge and you are certainly encouraged to enlist the help of the participant, if that makes sense.

But the donor is the one that has to ultimately get the data into SPARQ so that both the grantee – that the grantee gets the credit that it deserves and that SCSEP as a whole is able to accurately report to the secretary and the Congress on our performance for the year.

We understand that for many of the measures it will be difficult and perhaps even impossible to have accurate reports of performance. It's a situation we've encountered before, both in the last competition and also when we had the ARRA funding and then the dramatic decrease in funding. The department is still working out how we're going to handle reporting performance on the measures that are affected by the competition for this year and we hope to have an answer for you soon.

But certainly for the employment outcomes – entered employment, retention, and average earnings – we're really counting on the grantees to find a way to do the follow-up and get it in. We know it's possible because in the last couple of competitions you were able to do that and we didn't suffer much of a loss because of the transition, and we hope that'll be the case again.

I think, Judith, that is it for me for now. And we've got a poll coming up and then Terry's going to start – pick up with transfer information a little bit later.

MS. GILBERT: Yes. Thanks. Just the kind of overarching kind of message on all of this is how important it is for the donor grantees and the recipient grantees to be working together with each other, that most of these things are – can share joint responsibility because that's what the bottom line is in terms of making sure the participants are reassured.

Which leads us to the next poll about something that you need to be sharing with each other, and that is a question about, "Where are you on transferring files?" Making sure that whoever is the new grantee has all the information they need to provide appropriate services to participants.

MS. MCNEACE: Good poll. And the results are coming in. More than half say, yes, of course. Just a small percentage of those still preparing the files. Not yet. So it looks like 50/50 again. OK. Thank you for sharing that with us.

MS. GILBERT: Great. This moves us to the next, I think, big item and where we really will probably spend the bulk of our time today. It's about challenges and contingency planning. This is really an important risk management approach to where we are at this point. It's in everyone's interest – grantees, participants, Department of Labor, etc., etc. – in everyone's interest that this all goes as smoothly as possible at all levels. And the sheer magnitude of it is something that I think we're all struggling with and want some reassurance about.

There is some time left to resolve any overarching issues, but not a lot. Most of the communications that have been had, and that we've talked about on these calls, have really been kind of dyads between a donor grantee and a recipient grantee. But not an overarching where are you as a grantee on all the different tasks.

And so we would really want to hear from each of you on the items that are on this list, on this file. Kind of a quick status from each of you on the item. And also thinking about any contingency planning, just in case something comes up that you didn't anticipate or that hasn't been completed for every participant. It's thinking – anticipating what may happen and some helpful hints that any of you have come up with things. Because we've heard from some of you already different kinds of things that you say, oh, you must be ready to do this, just in case.

So these are the "just in case" kind of situations that would be helpful if you can share them with us and with all of your colleagues who might say, oh, I hadn't really thought about doing that; I guess that's – I think that's a good idea. So we'd like to sleep well at night knowing that everything is going well and this is our – kind of our last shot at making sure that we're not sleep-deprived for the month of January.

MS. MCNEACE: Either that or park our spaceship, the Enterprise, so we don't have to cruise the galaxy anymore, right, Judith?

MS. GILBERT: Exactly. So I've got a list here of all of the grantees. We have all of you hopefully on the phone and we can go through this relatively quickly. But I guess you all are used to being called on in alphabetical order, so I guess I'm not going to deviate from that. So –

MS. JACOBS: Before we continue to – once Judith calls your name, to unmute your phone please press \*6.

MS. GILBERT: Good thinking. (Cross talk.) Thank you.

Pat or John from A4TD, are you there?

MS. : This is Pat.

MS. MCNEACE: Hi.

MS. : Hi. Happy New Year.

MS. GILBERT: So quickly – you can be the test case here.

MS. : Sure.

MS. GILBERT: Go through our list of items on this thing – the participants, the case files, the paycheck issue, any IDL issues, missing people, and transfer list. And where are you in status or helpful hints, contingency plans for any of those.

MS. : Sure. The first item, in four of our states we finished participant and host agency meetings; we did them together. In two states we've completed; in two other states, one will be next week and the fourth state will be the following week. So we feel that we're totally on track with that.

Case file transfers. All of those are planned and we've been in communication with the donors and anticipate no problems. And we're getting them in various forms, some paper, some electronic; we're giving ours in electronic.

Participant paycheck plans. After 2/1, all of that's set. I don't think there's anything particular to report. It's just being certain that we have all the participant information and that's looking good.

Joint resolution of IDL. We're creating our lists of who we need to be talking with the donors about. So we anticipate no problems. We're obviously going to do the joint letters as requested and then we'll pick up on the others ourselves. We are inheriting from a donor that has an IDL policy; we in fact don't. Well, we all have policies; we don't give extensions.

Any missing or on-leave participants. We've been particularly vigilant on that. We're also watching for – and we feel that we've got that under control. Donors have said that they're reassigning participants and they are trying to exit participants who should appropriately be exited.

I was going to say something else on the people – (inaudible) – rate. Oh, we've been particularly vigilant on participants who have been assigned to the previous donor, being certain that if they're assigned to the previous donor that they were participant assistants or participants staff. And we've been in communication about what our plans are for having some of those people continue and have the balance of them reassigned to a host agency in due time by actually the donor, because they're the ones who are best prepared to do that. And they have agreed to do that.

Transfer lists. We're monitoring those and I think we're up-to-date on doing all that.

I think that's probably enough from us. Any other questions?

MS. MCNEACE: Thanks.

MS. GILBERT: That's perfect. Exactly what we're looking for. And if there are any – any things that you have contingency plans on if something happens?

MS. : Oh, I just can't tell you all of the plan B's that we've already done. We've met with tremendous success. And I just need to say, all of the donor and our new staff – which are primarily from the donor grantees – they are right now volunteering because most of them have already been laid off. Some of them are being laid off as of this Friday. They don't have offices. They don't have space. So we are communicating with them using their personal cell phones and their personal computers and they've been tremendous.

And it's not an ideal situation, but everybody's stepped up and we feel it's the best that apparently can happen. It's just too bad that nobody has really adequate funds to do this transition the way we'd like to see it done, but it is what it is and we're working with it.

MS. GILBERT: Thanks so much. That's very helpful.

AARP? Who's there?

MS. JACOBS: So Pat, if you can \*6, it'll re-mute your line.

COREY HASTINGS: This is Corey Hastings. I'm here.

MS. MCNEACE: Hi, Corey.

MR. HASTINGS: Hello.

MS. GILBERT: What's happening?

MR. HASTINGS: OK. So – (inaudible) – I would say – so I'll answer separately with regard to both incoming and outgoing transfers. So we have well over a thousand of both – (inaudible) – when I'm including cases where we are a subrecipient transitioning some participants in.

And so basically, on the participant and host agency meetings, those are going well. I would say we're about 85 (percent) to 90 percent complete. We do have a few more scheduled in January. And we used both – we offered in-person meetings but we also have had two separate cycles of WebEx meetings to permit people to attend electronically as well, although we still encouraged them to come to the in-person meetings. And the last of those WebEx meetings will happen this week and we just have a handful of in-person meetings remaining to complete.

The case file transfers. I was actually preparing to send an email out later this week to all of the grantees who will be receiving documents from us. We have those substantially done and complete in an electronic system. And our recipient grantees all have access to that system and we posted lists since a very long time ago with additional detail on the participants, so we have a secure format for that. But we are substantially complete on loading both participant files and then host agency agreements and (safeties ?). So I think that's progressing well.

In terms of participant paycheck planning, what we're really focusing on right now is picking up any participants who we were not able to – whose information we were not able to obtain through in-person transition meetings. So when you do the meetings, I mean, we don't – we never get a hundred percent on a state where we're transferring hundreds of people for a variety of reasons.

So we're going through the list and then doing one-by-one call follow-ups to make sure we've made contact with these people. And then we also are using extracts from the donors to set up as much of the information as possible to supplement and reconcile with what we get directly from participants.

In terms of the resolution of IDL issues, I mean, I believe we have that list there. We do have some donor – a significant number of cases where we have differing policies and we are prepared to apply the new policies with the missing or on-leave participants. That's part of the one-by-one follow-up process I mentioned. And I believe we've completed the return of the transfer lists. And we're down to where in round three there were only maybe eight or nine additions, relative to over 1600 or so original donations out we were making.

MS. GILBERT: Great. Thank you so much. Let's move on. AMPPM (ph), Nelson or Jaime, are you there? You can unmute your phone.

MS. JACOBS: Press \*6 to unmute your phone.

MR. : Hello?

MS. MCNEACE: Hello.

MS. GILBERT: Hello.

MR. : Yeah. This is Nelson from AMPPM.

MS. GILBERT: Yes.

MS. MCNEACE: Hi, Nelson.

MS. GILBERT: Just a quick on each one of these things because we do need to get through 20 people and we don't want to take too much time.

MR. : So right now we're currently doing our participant meetings with the participants and the supervisors present at the meetings. And we're probably about 50 percent done. We're having some this week and next week and we should be done by next Friday.

And some of the case files are being handed to us in person when we go to the meeting, and some of them we're in the process of getting those transfer case files.

Paycheck planning. We've been – (inaudible) – direct deposit to make it smoother for them. So we collect their – all their tax information at the meeting so that payroll is ready to set up for them before February 1st.

And we haven't had any issues with the IDL policies. The ones that are coming up for duration or are being exited before being transferred to us, and we have some within the 90 days that we're going to be exiting for duration, though.

And any participant that we've missed – (inaudible) – we're actually – some of the donor coordinators are out there getting those missing participants for us. So they're being handled and we'll be done with that next week.

That's pretty much all my report.

MS. GILBERT: Thanks so much. That sounds terrific. You can go back on mute.

And how about Easter Seals, Carol (sp) or Crystal (sp) or whomever, unmuting your phone?

MS. : Hello. This is Carol.

MS. GILBERT: Hi.

MS. : Hi. Happy New Year to everybody on the call. We are moving on schedule with everything. I think the only hiccup that we had was in Oregon where Experience Works and Easter Seals were working very closely together there. But there were some places in eastern Washington that are completely snowed and iced in right now and so we had to reschedule a couple of meetings and may have to find alternative ways to do those meetings because we can't get to the participants. But they will be done by the end of January.

The case files have mostly been transferred. I think that everything in Connecticut has been transferred, and Ohio. So as the donor grantee, we've moved all of the information onto the new grantees.

The paycheck plans have – that's all gone smoothly. We did have a question that I forwarded to Michi and I did hear back from Bennett on giving payroll information to a recipient grantee in one of our states. But we're opting not to give payroll information, like Social Security numbers and things, because we think that that's the recipient grantee's responsibility to get that. It's got too much PII information on it for my liking to hand that over to them. So I don't know if you have any comments on that.

I do have an IDL question. In one of our sites we are receiving participants who have been given the waiver over and over and over again multiple years. And our policy says you get one year waiver. So I understand that we would at least have to give a one-year waiver for those individuals that were given waivers. But when does our policy go into effect on that, since we usually only allow a fifth year? So that's my question on that.

And the rest of it I think we're doing fine on.

MS. GILBERT: Great. Bennett, do you want to –

MR. PUDLIN: Yeah. Thanks for that. I think the answer to your question is you're only obligated to apply the more liberal IDL policy for the first 90 days. So if that participant reaches the anniversary date or the durational limit date within the 90-day window, you have to grant the additional extension. But it's only for that one time. The next time it comes up, the person's under your policy.

MS. : OK. That's what I thought. So thank you very much for clarification on that.

MS. GILBERT: Good question. Thanks. And next, looks like Experience Works. Sally, you're on the line?

MS. : Hi. This is Andrea, actually, from Experience Works.

MS. GILBERT: Hi. Thanks for being there.

MS. : Hi. As far as participant and host agency meetings, as you know, we are a donor grantee; we are not a recipient grantee at all. And so we're basically at the mercy of the other folks that are mutually scheduling the meetings. So a good majority of them are done already. We still have some that are not scheduled until the week of the 16th; and so there's a few that week as well, but things seem to be on target.

The case file transfers. As you're aware, we're scanning a little over 7,000 case files. And so we're about, I would say, 50 (percent) to 60 percent complete with that. They will all be electronic except for one of the recipient grantees is unable to accept electronic. All the others have been fine with it.

Participant paycheck plans. We have sent a memo to all participants and host agencies regarding their last paycheck, regarding when they will send their timesheets in, etc. So I think everything's good there.

Our durational limit policy is much more liberal than most folks on the call and so we've gotten some upset participants about that. But we're letting them know that the recipient grantee will do everything they can to help them, moving forward.

Everything else – our transfer lists are up-to-date and have been submitted and everything looks good, as far as I know. And we should be ready to go February 1.

MS. GILBERT: Thank you so much. That sounds like you're in good shape under very challenging circumstances.

Goodwill? Who's there? Debra (sp)?

MS. MCNEACE: And press \*6 to unmute your phone. (Pause.) Or Susie Paulson (sph) with Goodwill?

MS. GILBERT: Or Jennifer or Michael?

MS. : This is Sandy. Can you hear me?

MS. GILBERT: Hi. Thanks.

MS. : (Inaudible) – I guess she's –

MS. JACOBS: I'm sorry. I couldn't get it off mute.

MS. : (Inaudible) – for us. So Susie?

MS. : OK. Thank you. I'm sorry about that. This is Susie calling from Iowa for Goodwill Industries, International. And as far as our participant and host agency meetings, they seem to be on track. A lot of them are being done in January, but there was probably half of them were done in December.

Case file transfers. There's a whole variety of different entities that are – that we're receiving. And so we're having a combination of electronic as well as actual case files that are being transferred.

The participant paycheck plans. All of the donor grantees that we've gotten information from has been really helpful. And the Goodwill has been really diligent about making sure that that's the number one thing, they make sure that the person continues to get paid for their training.

We do have a lot of people coming in that have a different IDL than what we have. And so we've been doing that case-by-case, trying to make sure that our new subgrantees – these Goodwills that have never done SCSEP before – are understanding how that needs to work. And they seem to be addressing it individually with each person that comes in with a different IDL than our policy.

We did have – and I think we've discussed that with Department of Labor. We had an individual coming in that there was some issues and I think, though, that between Debbie (sp) and Department of Labor you've all figured out how that is going to work for that individual.

The transfer list is all up-to-date and everything really seems to be going pretty well. I mean, it's winter and I know I'm in Iowa and I'm freezing, but most of the states are pretty up-to-date on everything that's happening.

MS. GILBERT: Great. Any particular contingency plans?

MS. : They are following up with people that are missing. And I know that that also is being addressed by each of the Goodwills. They haven't let me know that there's any problems at this time. We're all planning on meeting in Rockville the first week of February, so – (pause).

MS. GILBERT: That sounds very good. Thank you so much.

MS. : Thank you.

MS. GILBERT: You can go back on mute.

MS. : Thank you.

MS. GILBERT: Kevin, I'm going to – you're a new grantee. Do you have any – if you want to log on or hit – and let us know – your situation is somewhat unique in that you are not getting any participants transferred to you. But just where are you with your planning going forward? (Pause.)

MS. MCNEACE: Kevin with (IID ?)

MS. GILBERT: Push –

MS. : (Inaudible.)

MS. GILBERT: Yes.

MS. : Hi. This is Charlene (sp). I'm just going to speak on behalf of Mr. Cavin (ph), yes. Concerning incoming and outgoing transfers, that doesn't really pertain to us. We're just listening in on you guys.

But we are diligently working on getting everything up and ready for February 1st. We have recently hired a program director. And of course, we're making changes in our office as far as finding room for people and getting their computers and everything set up that they need to start working. We started to recruit and we're making contacts with agencies.

So that's kind of where we're at right now.

MS. GILBERT: That sound good. Thank you so much.

MS. : You're welcome.

MS. GILBERT: At the end of the call I want to hear from you and the other three new grantees to see if there's anything else that we can do to provide some help to you. I think it was helpful for you all that we did a special kind of new grantee blurb part at the end of the last transition call. So just be thinking about that.

How about Mature Services. Anyone there? Paul or anyone else? I didn't see –

MR. : Happy New Year, everybody.

MS. GILBERT: Aha. Hi, Paul.

MR. : As far as the host agencies go, we've actually had – we completed our host agencies and we did them jointly with host agency and participant, so we could really be aware of any issues coming up. And had a lot of cooperation from the recipient and donor grantees. We held them at One-Stops, for the most part, which allowed us to also meet up with the workforce individuals and negotiate MOU agreements going forward.

And we did bring our files – paper files along, as well as provide transfers – electronic files on spreadsheets, where important.

Now, the payroll, we're fine on that. We've moved ahead with that. We have – in our letters we had specific instructions for where to get the checks mailed to them and how to sign up for direct deposit and everything. So we're good that way.

And we don't really have any other issues. We're up-to-date on the transfers. And we did have a couple people on leave, but we were able to track them down.

MS. GILBERT: Sounds good. Thank you. Navca (ph), either EJ or Tom?

MS. : Hi, everyone. This is Huyng Jung (ph). Happy New Year.

MS. MCNEACE: Hi.

MS. : Hi. OK. So after the announcement, we had a selection process for the new grantees in our new areas. So now we are working with the new subgrantees under Navca and also donor grantees for the participant host agency meetings. So we didn't have any participant host agency meetings yet, but we are having about 20 participant host agency meetings for the future two, three weeks. Right now, you know, everything looks smooth, so it will be fine.

And case file transfer. We didn't receive any file transfers yet because we didn't have any subgrantee yet. But now some of our donor grantees, they're uploading the files and also they are also making some copies. I believe that we are going to get the file transfers very soon.

We also will make sure the participant paycheck, as of February 1st it will be totally fine. And then we will work on it. So right now, donor grantees and our subgrantees and even Navca staff are all working on it, so they know we will be fine.

Most of our participants, they don't have any IDL confusion. In some areas we have different IDL policy, but very good thing is our new subgrantees, they are also – (inaudible) – provider in the past or even current. So they are very aware of that and then we will work on it one-by-one if it is necessary.

Right now we don't have any missing participant list, but we will work on one-by-one for the participants who are on leave and I believe they will be fine.

Our transfer lists are up-to-date.

MS. GILBERT: Terrific. Thank you so much.

MS. : Thank you.

MS. GILBERT: National Able? Who is there? Pat Wilkins (sp)? Could you unmute your phone and talk to us?

MS. MCNEACE: Please press \*6 to unmute your line. (Pause.) Nope? We can skip and go to the next one and come back.

MS. GILBERT: Yeah.

MS. : I'm sorry. I'm here, guys. I apologize. Happy New Year. This is Pat Wilkins.

With regards to participant and host agency meetings, on the donor side most of those have either occurred or they're scheduled to occur. And on the recipient side, most of ours are going to be taking place within the next two-and-a-half to three weeks. We're doing a combination of in-person and also webinar for those participants who would have to travel a far distance. And we're just trying to give them an option to do either/or. And we are also doing a combination with the participants and host agencies as well, just to make sure everybody's on the same page.

Case file transfers. We have received some and we are in the process of making arrangements as a donor to also make sure that those files are to the new grantee no later than the middle of January.

Participant paycheck plans. We are in the process of doing – or scheduling training with all the new participants and host agencies on National Able Network's payroll policy, because all of ours is online now. So we're doing a series of about 20 trainings over the next three weeks to make sure that that process is understood.

We've hired quite a bit of staff from the donor grantees that have been working with us. Again, I think Pat Elmer (ph) mentioned that some of these staff are no longer on payroll, but they have been working diligently to make sure that no participants are falling through the cracks at any time.

The IDL policy. I think Carol addressed that already and that was one of my questions, so now I've got clarification on it.

Transfer lists and everything else seem to be on target right now.

MS. GILBERT: Terrific. Thank you so much. Ms. Carter, are you there from NCBA? We see you've logged in.

MS. : Ms. Gilbert, can you hear me?

MS. GILBERT: Yes, I can, Ms. Carter.

MS. : How are you? (Chuckles.) OK. So here's where we are.

MS. GILBERT: Not what we usually call each other.

MS. : I'm sorry?

MS. GILBERT: I said that's not what we usually call each other.

MS. : No, it is not. Happy New Year, everyone.

As for participant and host agency meetings, we are I would say about 75 percent complete. We've done – from the donor perspective, we're done. And just about into the end of January we will be complete from the recipient side of it.

Case file transfers. From the donor side, we are done. From the recipient, we're still working hard at that. There's been some challenges, but we're in communications with EW and they have been very receptive in working along with us to get through this transition in a timely manner and meet the deadlines.

As for the participant paycheck plans, we are, I would say, looking good with that. We are expecting to receive some electronic data very soon, which will put us meeting that deadline for sure.

Joint resolution of any IDL-related questions. We are OK with this. We do have I think about 10 people that are in question regarding IDL, but we're on top of that as well. And I'm sorry I can't pinpoint that down a little clearer for you, but I know that we are on top of that.

We have actually about eight people that are currently MIA that we're doing research on. And I hope to hear by tomorrow that that's been cleared up as well.

MS. GILBERT: Are these people currently your participants?

MS. : No, they're not.

MS. GILBERT: So ones that you're going to get?

MS. : That is correct.

MS. GILBERT: OK. Got it.

MS. : And that's it.

MS. GILBERT: OK. Great. Thank you. We're moving right along.

MS. : You're very welcome.

MS. GILBERT: I'm very impressed that we're making such good progress. And I must say, it's very reassuring to hear the level of detail. That's going to help the sleeping at night.

Next is NCOA. Barry, are you there?

MS. : Hi there. This is Maura Porcelli with NCOA.

MS. GILBERT: Oh hi, Maura. Thank you.

MS. : We are about 90 percent complete with our meetings. All of our subgrantees and our resource centers have conducted at least their first round of meetings. And right now we're doing some second round of meetings for some folks we didn't – who weren't able to make the first round of meetings. Those will all be completed by the end of next week.

In terms of case file transfers, where we've been able to get and give our paper files, that has been completed. The vast majority of the files we are getting are electronic, so our local folks are downloading those now. So that should be done within the next week-and-a-half as well.

As we've been holding the meetings, we've been doing all of the paperwork necessary for payroll and that's been going into our system. So we should have no problem processing payrolls after February 1st.

Our policy is – regarding the IDLs is a little – we're a little more conservative than most of the – where the participants that are transferring into us, they are coming from a program where they are getting extensions. So we know exactly who they are and that they will be likely requesting those extensions and we're ready to deal with those.

And right after – our projects that have finished their meetings are now trying to track down any missing participants, folks who have been on LWOP and are just tying those loose ends. And then the folks who are doing their meetings right now, they're going to swing into that follow-up mode next week as well. So we're feeling very good about where we are in terms of the transition and the paperwork.

MS. GILBERT: Thanks so much. I know one of the things that Jim Sythe (ph) had mentioned another time – I think it was on a call – his recommendation about payroll is that you – everybody should be prepared to have somebody in whatever office it is, in every locality, prepared to write out a paper check in case the whole electronic thing hasn't worked or the person hasn't gotten their information in. Do you have any information on how you're doing that? I can't imagine he's not making you do it.

MS. : It's really just that sort of painful process of having to deal with it as it happens. It happens from time-to-time even now. And it's really just a situation basis where we've made several attempts to reach a participant, they've not been responsive, and then all of a sudden they show up with a paycheck. How do we honor that?

And it's really making them get their – making an arrangement to meet with them, get the payroll documents that we need necessary, and then getting that paper check cut by our finance office in a matter of days. There's really no expeditious way to do it, unfortunately. We're just trying to mitigate that as much as possible by having – (inaudible) – participants solidified and know exactly who those individuals are so we're prepared in the event that does happen.

MS. GILBERT: Yeah. No, I absolutely understand. I think it's a key issue that – when we started this transition, it was something that Senior Service America folks mentioned as an important lesson learned from four years ago. And Jim Sythe chimed in as well about the importance of how difficult that can be, especially since we're all relying so much on electronic things that are, in my view, fraught with peril at times. But as long as you're thinking about that – and it sounds like everybody is really paying close attention to that issue this time, so that's great. Thanks.

Next on my list is Nicoa (ph). I see Randella (ph) has looked like she's logged in. Or is it someone else on Nicoa? Whomever you are, unmute your line and talk to us.

MS. : Hi, Judith. This is Marie Kim (sp) sitting in for Randella. And Sue Champan is on travel.

MS. GILBERT: OK. Just go ahead.

MS. : Good morning and Happy New Year.

MS. MCNEACE: Thank you, Marie.

MS. : As far as our participant and host agency meetings, we are done with 90 percent of it and with – I mean, most of them were successful, with a few cancellations. We're just donating, so –

The case file transfers. Some of them we already electronically sent them over. And then the – most of them will be all sent next week. We'll be done by next week.

Paycheck plans. We don't have any because we're just – we're not receiving any new participants.

IDL questions. We don't have any. And we don't have any missing or participants that are on leave. And then we're on top with the transfer lists.

MS. GILBERT: Thank you so much. One thing I do want to mention to everyone, I sent emails right after Thanksgiving – or just before – to I think six or seven grantees.

Nicoa was potentially going to have a number of orphans because they were needing to leave six states. And it was so heartening – and not surprising, however – that every one of the grantees that were serving in the areas where Nicoa currently was – those six states – stepped up and was willing and able to take the Nicoa participants who were no longer going to be able to be served by Nicoa.

So you all need to know what an incredible team everybody is out there and how well all the grantees worked together. It was very, very heartening I think to all of us how well that went, and without any arm twisting. It was just wonderful. So thank you.

Next one. NOWCC. Is Kathleen there? Or Beth?

MS. : Hi, Judith. How are you? This is Kathleen Branch (sp) with NOWCC.

MS. GILBERT: Yes.

MS. : And just wanted to report that we had the pleasure of going to our territory in California, to the participant and host personal meetings with AARP Foundation. And wanted to report that the meetings were very positive. The project director for Experience Works was fantastic and it was really – there was a focus on keeping the participants very informed on what was to happen, reassured, and also a focus to make sure that they got their paycheck on February 1st.

In terms of case file transfers, that's of course in process. Again, our participant paycheck plan is to ensure that everybody has a paycheck on the 1st.

And then our IDL questions, we did have some of those and we did make a special request for IDL that we're waiting to hear back about.

And then as far as any missing or on-leave participants, we are certainly watching out for that.

And then we have received our transfer list. So that's an update on where we're at.

MS. GILBERT: Wonderful. Thank you so much.

MS. : Thank you.

MS. GILBERT: Just thinking about if there's anything else that you need in particular from us in the next week or the next month for you getting started. Anything that would be helfpu.

Next up is National Urban League. I know I talked with Priscilla earlier today and she's doing meetings right at the moment. But I think she said someone was going to be on the phone, she hoped, from NUL.

MR. : And that will be me, Jim Osco (ph) at the National Urban League. Happy New Year. Thanks for having us.

Start at the top. As you mentioned, Priscilla's out in the field in Florida and another one of our colleagues is in the field here in New York wrapping up the remaining participant meetings. There are two host agency meetings that'll be completed, the last ones, prior to the 13th of January.

As for the case file transfers, we're donors in two cases. And in both cases the files are ready to go. We're coordinating with the recipient grantees to make sure that the files are transferred in a timely fashion and in accordance to how they desire the files. There's that.

So participant paycheck plans. For that, we offer it on a different pay schedule, it seems, from all of our donor grantees. So we have a little bit of time from when our pay period starts to where their pay period ends. However, we are having contingency plans kind of laid out to make sure no one falls through the cracks. And as you said, we're prepared to issue paper check as needed. Those are conversations we're having with the recipient grantees especially, to make sure that we don't miss anyone there.

As for the IDL questions, we do not offer IDLs, and nor do – I mean, sorry, don't offer extensions past the 48 months, and nor do any of the donor grantees to the National Urban League. So there aren't any issues there.

We're not aware of any pending terminations, however we are keeping track of the list of participants to make sure that if and when those pop up, we're aware of it. Same thing with missing or on-leave participants. We are diligently making sure that no one falls behind, to make sure everyone is taken care of for the 1st of February. So we're keeping an eye on that.

And last but not least, transfer list. We did resolve the discrepancy that was noted at the beginning of the call with the transfer list in Michigan. And that issue appears to be resolved. Thank you, guys, for being responsive and helping us out with that.

And we've had great relationships and great communication with our donor grantees in Boston, Detroit, in Florida and elsewhere, so it's been a fairly smooth process. And that's all I have.

MS. GILBERT: That sounds great. Just for our edification, how is your payroll period different from what you think everybody else's is?

MR. : Well, the schedule. It appears that we're offering on a schedule with using Paycom. A lot of people seem to be using a different payroll program. So there's a gap almost, where there's ours ends on the 1st normally, for our existing participants, and most people's are on a different pay schedule. So between ADP and Paycom, most people seem to be using ADP. There is a little bit of a time difference there. Otherwise, it's not any different from that.

MS. GILBERT: OK. But you're dealing with it, so participants –

MR. : Correct.

MS. GILBERT: – (inaudible) – left behind.

MR. : Yeah. We're making it – we're emphasizing that time difference during our participant meetings so there's not any real concern about that once they transfer to us.

MS. GILBERT: OK. That sound good. Thank you.

Operation Able in Boston, are you there?

MS. MCNEACE: I didn't see anybody –

MR. : Hi, it's Mark Turino (ph) from Operation Able in Greater Boston.

MS. GILBERT: Great. Thanks, Mark.

MR. : Hi. Hi, Judith.

MS. GILBERT: Hi.

MR. : Happy New Year to everybody. Things seem to be going pretty well with us here in Boston. We've had a number of participant and host agency meetings. I think we have a host agency meeting – our last one in Boston – next week. And so all of the Massachusetts transfers, all the participants have been spoken to at the various meetings. We'll have our New Hampshire meetings coming up in a week or two and that will be taken care of.

As far as staffing, we've been able to take on a number of the donor staff. So that's worked out pretty well to provide some stability to the program.

We're looking at case file transfers possibly next week or the week after and that seems to be going pretty smoothly.

We have been in great communication with the donor agencies regarding payroll. Hopefully we can electronically transfer the payroll database from one system to another and that should hopefully go along very smoothly. And in any case, we are collecting the payroll documentation at all of the meetings to make sure that participants' back-up documentation is in the files and ready to go.

Regarding IDL, I think we're on the same IDL schedule as the donors, so that hasn't been an issue.

We're looking at any pending terminations and have been in contact with the donors regarding that, as well as the missing and any participants on leave of absence.

And we have the latest transfer list and are currently going over that and haven't really seen any major issues or concerns regarding that as well.

MS. GILBERT: That sounds good. You mentioned something that I have not heard before but I want to raise with all of you. You talked about transferring payroll information electronically. I hope that people are password protecting any information that they're sending over the wires that contains participant information in it. The PII is really important and so password protecting things as you send them out is a very important caution – precaution to take.

MS. MCNEACE: The emails need to be encrypted at everything.

MS. GILBERT: Right.

MR. : Exactly.

MS. GILBERT: Great. Thanks. A couple more; that's all we have left. Senior Service America. I think – who was there? Postale (ph)? (Pause.) Tony? Marta?

MS. : No, it's Chris (sp). Hey, Judith. Hey, Michi.

MS. MCNEACE: Hey, Chris. Happy New Year.

MS. : Thank you. You too. Are we last?

MS. MCNEACE: No.

MS. GILBERT: No. Two more after you.

MS. : Well, I was going to say, we're fine; you can go to the next.

It's going fine. Participant meetings and host agency meetings will be done by the 23rd. We're not having any issues with case files or payroll or IDL or missing participants. The transfer list is very helpful. And all the providers we've been working with have been great.

We're the donor grantee in Ohio, Pennsylvania, Illinois, and California; and the recipients in different areas in Illinois, Minnesota, Texas, and New York. So it's going fine and we don't have any issues to report.

MS. GILBERT: Terrific.

MS. MCNEACE: Fantastic.

MS. GILBERT: Thank you. Two more. Just need to hear from Sare (ph) and The WorkPlace. So Sare, you're next on my list of – and I see Gabby (sp) and Raul look like they're both logged in.

MR. : Thank you. Can you hear me?

MS. GILBERT: Yes, we can.

MR. : Excellent. Excellent. Participant and host agency meetings, those were combined. And out of the eight states that we are either a donor or a recipient, we have five of those done. And the next three are going to be completed in the next weeks.

Case file transfers. We're doing a combination of hardcopy and electronic, password protected. And they're going to be transferred by the middle of January.

Participant paycheck. Similar to Urban League, we also close our payroll on the 1st. So we will do a payroll for the 1st and then continue with the normal schedule for the participants. But we're on track as we speak. Staff are entering the data for the meetings already completed.

The IDL. We do not have any, but yes we're getting about – out of the participants that we are receiving, 15 – 1-5 – 15 of them qualify for a – or might qualify for an extension during the 90 days.

Then any missing participant or on leave. We're working on those. And the ones that didn't attend the meeting, working on those as we speak, on the phone and reaching out to them.

And the transfer list. Those are done. Gabby over here reviews everything and makes sure that all the data is correct.

MS. GILBERT: That sounds terrific, Raul. Thank you. And last but certainly not least, is Michael there from The WorkPlace? (Pause.) I thought that Michael had signed in, or –

MS. MCNEACE: Anyone else on the line?

MS. GILBERT: – Jan Barkley (ph) or Adrian Parkman (ph)? Unmute your phone if you're there.

MS. MCNEACE: Press \*6 to unmute your phone line. (Pause.) Well, maybe we'll catch them at the end.

MS. GILBERT: Yes. Let us know in the chat that you're there and we'll call on you.

A couple of things that I heard overall. Focusing on this whole contingency planning idea, and one is about weather. And I think that it's important to think about how – Carol already talked about it in Washington and Oregon – that the weather may make having meetings in person difficult or impossible. So you all ought to just be thinking about that as a contingency, if you haven't already. How are you going to handle that if you can't literally do it and keep people safe getting there?

And always the issue of anything – any time we're relying upon electronics for files or paycheck information or any of that, just have to have in the back of your mind something can happen and that doesn't go as smoothly as we've come to expect on a daily basis.

I don't know if there were any other big issues.

MS. MCNEACE: The WorkPlace, is that Joyce?

MS. GILBERT: Joyce, are you there?

MS. MCNEACE: Hit \*6.

MS. : I unfortunately hit the disconnect instead of unmute, so I had to dial back in. And I came back on just as I was listening to Judith talking about weather. And yes, we have been negotiating very seriously with Mother Nature because we've got half of our – of meetings completed and we're working on the other half. So we've got our fingers crossed and we do have some contingency plans.

And we have experienced a lower turnout in the host agencies at the meetings than we had hoped. But we are planning webinars for the last couple weeks of January, just so we can get them caught up on any issues that they may have. And we'll also record those in case they aren't convenient for the time. We do want them to be able to get the information that we've already shared.

As far as everything else goes, things are really going well. And I see on the agenda that SPARQ is coming up, so I won't ask the question of when are we getting access? (Chuckles.)

MS. GILBERT: OK. Thank you so much. And I for one – and I'm sure Michi would agree, and Bennett and Terry – that I'm very encouraged by what we're hearing. As we said, this is kind of a huge task with the sheer magnitude of it, for some of you more than others. But nonetheless, things seem to be on track.

This is what I would request. As we move forward in this last month before February 1st, my rule about anything is we can handle anything as long as there are no surprises. So I'm – this is my request to you. And you all have my email directly and that's what you should use at this point. Please give me – us – and cc Michi as well – a heads-up on anything – any glitch that's coming up and we'll see what we can do to help you resolve it. But even if not, we just need to know about it so that we'd be prepared and we can notify the appropriate people that we need to so that – it's just no surprises. That is always the wisest rule – thing to follow.

So please give us a heads-up on anything – even if it seems like a minor thing. Don't worry about that part. I'd rather know and have something get fixed and not be an issue than saying, oh, and –

MS. MCNEACE: We didn't know.

MS. GILBERT: We didn't know about that. That's always – that's what keeps one awake at night.

So thank you all so much. This is very helpful. I hope it was helpful to you as well, but I certainly know it has been for us here.

I want to turn it now –

MR. PUDLIN: Judith, before you move on, I just – one thing I want to remind people. No one mentioned it, but this is the critical time to be thinking about the transition of participants who are going to be exiting for durational limit. I know people say they're on top of the IDL issue and that's critically important; it's a legal requirement.

But it's equally important that those folks who are not eligible for an extension and are going to be reaching their durational limit have transition plans in place, and that donor and recipient are conferring on those plans, where they're going to have to be finally implemented by the recipient. So we don't want to leave that to the recipient to have to come in late and try to piece something together in February if it should have been started already. So please keep that in mind –

MS. GILBERT: Very helpful.

MR. PUDLIN: – for this last month.

MS. GILBERT: It reinforces our primary consideration here about making sure the participants are appropriately dealt with throughout this entire process.

With that, I think it's time to turn things over to Terry, who's going to go quickly over the transfer list items on the next slide

TERRY CRAM: Hi, everybody. You should all have received the third version of the participant transfer list on December 28th. If any of you haven't received it, please contact us immediately. We have received responses from some grantees already and we are in the process of reviewing those. And we do need to receive a response from every grantee by January 9th, which is next Monday. So even if the answer is "no changes," you need to tell us that.

We'll then turn those results around and send out one last version of the list on January 17th. We're hoping that huge majority of responses will be "no changes" and we need to get feedback from you on that by January 20th.

All transition-related transfers – including any category 3 transfers, which Bennett will talk about in a few minutes – will be entered by SCSEP Help and the SPARQ developer via a batch process. So you don't have to enter anything into SPARQ yourself. We'll be doing that on January 23rd. Starting the next day, you'll be able to see those transfers in the SPARQ transfer utility.

If at that point you notice anything that needs to be adjusted, we'll have to make the adjustment via the transfer utility. However, you should contact us at SCSEP Help and ask us to make the adjustment. You should not try to make any changes in SPARQ yourself. So any transfer that is going to happen on February 1st has to be handled by us.

Transfers will process automatically at 6:00 a.m. on February 1st. We expect that process to take between 15 and 30 minutes. At that point, all records will be in the recipient grantee's RG999 sub. Most of you know that's the recipient subgrantee for transfers; it's kind of a holding place. That each recipient grantee will then have to move the record from RG999 to the appropriate subgrantee records before your subgrantees and local projects will be able to see the data in SPARQ. And we will send an email with instructions on how to do that, reminding you to do it on February 1st.

Bennett, you want to talk about the category 3 now?

MR. PUDLIN: Yes. Thank you, Terry. And just want to again thank all of you for having been so diligent in addressing the transfer lists. We told you when we started this process, the first list back in October, that if we were on top of the mandatory transfers required by the competition that we would attempt to accommodate discretionary transfers as part of the batch process.

And the good news is you have been so great about that, that we feel confident that we have the mandatory transfers under control. And we will now entertain your requests for discretionary transfers. And we've called these category 3 because we did, in the transfer list in that last tab, provide you a list of all the counties with your enrollments and the degree of over-enrollment and a flag we put to indicate a significant over-enrollment – at least by the standard we've been employing.

We don't literally mean this is confined to category 3. This discretionary transfer opportunity is open in any county where you believe, by your standard, you can't support the number of participants you have. This applies to both national and state grantees in any county where there's significant over-enrollment.

It'll be an expedited process. Shortly after this call is over, you'll receive an email from SCSEP Help with the usual instructions with some small modifications and a form. Because it's part of the transition, you return the form via a reply email to SCSEP Help and follow the instructions that you get.

And as long as we get that back from you by January 20, that'll be time enough to include it in the batch process that's going to the developer on the 23rd of January. I encourage you not to wait, however, because if there are any issues it'd be good to get those resolved sooner rather than later.

I'm not going to go into the requirements; they're very familiar to you. They basically mirror the requirements for the normal discretionary transfer. You've got to get approval from the recipient. You can't compel anyone to take your surplus participants. You're going to have to copy the recipient on the email. You're going to have to recite if the recipient's authorized to serve in the county. And you're going to have to recite that the recipient will accord the transferred participants the right of first refusal and the more liberal IDL policy for 90 days. And you'll have to deal with any break records or where there are assignment end dates in the record that have be cleaned up. All that'll be explained to you. It should be old hat.

But again, we encourage you to get them in as soon as you can. The latest is January 20. After that, then everything will be done through the standard procedure using the transfer utility.

I think that's it. And back to Terry for a few more items.

MS. CRAM: Hi. Before we go on to the next slide, we did receive a question that applies to what I was just talking about. So I'll answer that now.

If a participant has exited and is still on the transfer list, hopefully the exit has been entered into SPARQ since the last version of the transfer list. And if so, they will not be on the next version of the transfer list.

But let's just say that, for whatever reason, the exit does not get entered into SPARQ until after the very last version of the transfer list is sent around. So we on the 23rd enter into the utility a participant to be transferred, and then on the 31st someone enters an exit date into SPARQ for that participant. SPARQ will not transfer that record. SPARQ will only transfer records that do not have exit dates. So you don't have to worry about receiving a participant who has an exit date.

If, on the other hand, a participant actually does exit before February 1st but that exit does not get entered into SPARQ, so the transfer does go through, then the recipient grantee should let us know that they received a record that they shouldn't have. And we have a tool to nullify or reverse that transfer.

So anything that happens – just about anything that happens in SPARQ is adjustable and correctable. So hopefully it won't happen; but if it does come up, we can deal with it.

So now on to the next slide. Everybody's favorite question about SPARQ, access. SCSEP Help is ready to provide SPARQ access to the new grantees as soon as the national office gives us the go-ahead. But there are a few things that we can do to prepare for that.

So even before we get that go-ahead we'll send you an email regarding what information we need from you so that we'll be ready to set up your accounts as soon as we get the approval.

In that email we'll provide information about the SPARQ demo site, which grantees can use for testing and training purposes. You're not supposed to put any kind of real data in there, certainly no real names and addresses and SSNs. So you can play in there to your heart's content, practice doing things, see if it works, see if it breaks, whatever. Hopefully you can't break it, but – if you're trying to see what causes a certain reject trigger, you can play with it in that site.

And then the last thing we want to talk about is how SPARQ deals with the QPR. The way that the QPRs are generated, SPARQ calculates subgrantee-level QPRs and then rolls them up into the grantee level QPR. So regardless of whether or not a grantee uses subgrantees or local projects or manages the program centrally, they must have at least one subgrantee per state.

I sent an email to each of the new grantees today explaining the options, and we will be sending an email to all existing grantees requesting information for any new subgrantees that need to be added. We will need to enter that information into SPARQ before we can create the SPARQ accounts, or just existing accounts at the subgrantee level. So please send us that information as soon as possible.

And then finally, for anything SPARQ related, please use the address on the screen, which is help@scsep-help.com. You've all received emails from us, from that email address, so you should have it. Even if you happen to have one of our personal email addresses, please don't write to them. I mean, if you want to say, hi, how you doing. But if you have a question about SPARQ, please use the help address because that way we can make sure that it is handled – we log it in; we make sure that it's handled as quickly as possible. The person who's most able to answer a question will take care of it. So that will be our central email address for everything.

And that's it for me.

MS. MCNEACE: Thank you, Terry.

MS. GILBERT: We are working on – working with the grant office to make sure that we can get that access for the new folks just as quickly as possible.

MS. MCNEACE: Yes. So the preparation to –

MS. GILBERT: Is going to be helpful. Right.

MS. MCNEACE: Is very helpful. So we appreciate that.

So we're going to go to the next slide, which is the final preparation. So we're just going to kind of just go through this in 30 seconds flat.

Basically, the reason why is we talked about the "must" and the "should," what you must have done or should do. And from listening to each and every one of you, we feel that every one of you are on target. You're meeting the requirements for transition and we're all very pleased. We've been sitting here shaking our heads, doing high-fives because we're happy to hear that things are going pretty smoothly out there.

And the "should" part is just making sure that, like Judith was mentioning, the contingency plans, on what happens about if there are any payroll glitches, your follow-ups with participants that are missing. We love the idea about this optional blended meeting that you're having, where there is virtual or in-person, especially with the weather conditions that have impacted parts of our country.

So maybe it's possible, based on timing, is at the end when we go to questions and answers, there was one or two grantees out there that talked about that they actually held a virtual meeting. If you can kind of tell us how that went, if you've already had one, that'll be interesting for us to know.

And other than that, I believe that we're on target – every one of the grantees are on target to meeting that ultimate timeline date of February 1 where that switch gets flipped, right?

MS. GILBERT: At 6:00 a.m.

MS. MCNEACE: At 6:00 a.m.

MS. GILBERT: Eastern Standard Time.

MS. MCNEACE: Eastern Standard Time. So with that, I'm going to go ahead and pass it on to Judith.

MS. GILBERT: So our last slide here is about the first 90 days. And this is actually where we started, making sure that we transferred all active participants, that no one's left behind; that participants have 90 days to remain in the same host agency at the same rate of pay; and that in terms of the IDL, they're receiving the policy that is most favorable to them for the first 90 days.

I don't think we need to say any more about that. I would like to move to – in our final few minutes to the last slide on questions and next steps.

Any unanswered questions? We do have a couple here. The person said they received the TEGL and it talked about the notification about special requests. If you've already sent those in with your budget request, you do not need to do it again. The important point here is if you want any of the special requests for February through June, you must ask for them again, even though you had them approved for the first part of the year. So as long as that's clear and you've done what you need to do, then I think we're fine.

The other question is about the transition funding and asking for a little bit more information about the allowable scope of work, because I don't – very, very few of you got what you asked for in the approved transition funding. It basically is administrative costs. And we felt that letting you know how much you were going to get, especially if it was less than you asked for, it became your management task to figure out which of those administrative items that you had put in request for that you were going to spend the money on. But I will talk to the grant officer and see if we can get any more information than that.

Basically, you need to look – and I don't have it in front of me, but the reg that talks about what's an allowable administrative cost. And that's what you're going to just need to be able to support that in fact you did spend the money.

I hope that answers that.

If there is any question about – one of the things we talked about promising to do – and I have to plead guilty to not fulfilling that promise – and that was about putting in writing separately all of the questions that came in in kind of a unified FAQ. We've not done that primarily – for two reasons. Because of time constraints and – but also because we really do believe, unless there's some unanswered question that we haven't dealt with, we have talked about all of those things on one or the other of either the transition calls, which are all – in writing for you anyway – and on the all-grantee calls, which you have transcripts of.

So if there is anything else that you really need to know that we haven't answered, please send it to me directly and that'll guarantee that I'll hopefully be able to pay attention, even though you do know that I'm only a part-timer here. But that's OK.

MS. MCNEACE: She's not part-time. She's here all the time.

MS. GILBERT: Generally I'm here Tuesday, Wednesday, Thursdays now. Now that things are in good shape.

The other thing we wanted to talk about a little bit – this is our last scheduled call. We don't see the need, quite frankly, of doing another webinar. But wondering if any of you think it would be – we think it might be helpful the last week in January to just do a quick touch-bases call for anyone that wants to be on it. Or we ask everyone to do it; we'd try to keep it to a half an hour or so. Perhaps doing one in mid- to late-February to see how things are going and any issues that have come up.

And then the possibility of another one in mid-May after the transition's over, because that really in some ways leads to the last item on the list, which is kind of a debrief about the competition and the transition. What worked and what areas for improvement are there? So that when this comes around again in another four years, that we're well-prepared and have though through all of the things that could be made better.

Anyone want to – you can unmute your phone and weigh in or – if that idea about some transition calls – just quick calls, touch-bases calls, problem-solving calls, if you will, the – one in late January, one in the middle to late February, and one in May after the transition is over. Does that make sense to people? Let me know.

MS. MCNEACE: So anyone would like to jump in, just press \*6 to unmute your phone. Everyone can hit \*6 and unmute your phone.

MS. GILBERT: Yes, you can.

MS. MCNEACE: Yes.

MS. GILBERT: And new grantees, the four of you, was there anything else at this time that you need us to be helpful with, other than getting you SPARQ access as soon as possible? Let us know that.

My direct email is gilbert.judith.c@dol.gov.

MS. : Judith?

MS. GILBERT: Yes.

MS. : And Michi. It's Chris from Senior Service America. Yeah. Just to answer your question, I think a follow-up call maybe in February is a great idea. A debrief. And just want to thank you all for all these webinars. You laid everything out so that it's been very clear what the expectations are and what the tasks are. So I want to thank you for that.

MS. GILBERT: Well, thank you. That's good to hear. Anyone else? (Pause.) Oh, people are typing too, I see.

MS. MCNEACE: Well, in the meanwhile, I just want to do a quick recap. And it's just two bulleted items before we do end the call. And that is, earlier Judith asked if any of you should have any issues or problems or hiccups that should come up between now and February 1 or thereafter, please let us know. Please email Judith and myself and we will do anything or everything we can to help you resolve it.

MS. GILBERT: Or at least we're on notice that something –

MS. MCNEACE: Exactly.

MS. GILBERT: Every problem is perhaps not fixable, but it's helpful to know the ones that maybe are.

MS. MCNEACE: So that we are not all left in the dark and we didn't know.

MS. GILBERT: Or blindsided.

MS. MCNEACE: Blindsided is the word. And secondly, as Terry mentioned, for your SPARQ access do look out for the email that'll be sent out. And please send back the information that they're requesting for you so that they can get you set up and get you ready to go.

MS. GILBERT: And we will all be in touch. There is an all-grantee call next Wednesday.

MS. MCNEACE: Yes.

MS. GILBERT: And so we'll be talking to you all then. And thank you to the FPOs that are on the call too. We see half a dozen of you, so we hope that's very helpful. I know that it's helpful to the grantees.

Thank you all so much. Happy New Year and keep working – I'm sure you will – for the rest of the month and until May 2nd for sure about this transition. It's been terrific so far. Thank you.

MS. MCNEACE: It's been great. And look for us in our little Enterprise floating around the galaxy somewhere.

MS. GILBERT: Indeed. Thank you all.

MS. MCNEACE: Have a great afternoon.

(END)