

Q & A from Local Planning Conference on March 22, 2000
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Early Morning Session

LOCAL PLANNING INSTRUCTIONS

1. WIA Goals vs. Career Center Goals?

Q: Performance: Will overall WIA goals be the same or separate from Career Center goals?

A: There will be overall WIA goals and specific program performance goals, because there are specific requirements for serving customers in different funding streams. The overall WIA goals should be seen as representing some of the local goals for your One-Stop Workforce Investment system. Specific program performance goals will be delineated in the individual Scopes of Service for each program.

2. Career Centers' Quarterly Report?

Q: Career Centers completed a Quarterly Report for the last quarter; however, we did not receive one for this quarter. Do the definitions from that report still apply?

A: These definitions have not been changed. Prior to the implementation of MOSES, for the balance of this fiscal year, we will continue to use the Quarterly Reports to gather Career Center information.

3. Charter Goals vs. WIA Goals?

Q: How do the goals in our current Charter relate to the new goals? Will new goals take precedence over the Charter goals?

A: At this point it is not completely clear how existing goals and performance measures in current Charters should be, or need be, modified. In addition to the overall goals in the five-year plan, One-Stop system goals will be affected by the results of local negotiations of MOUs, future collaboration among partners on cross-program measures, and additional reporting capabilities across funding streams to be made possible by MOSES. At some point, closer alignment between the local plan/MOUs and the charter goals is desirable.

4. Universal Customer vs. Job Seeker?

Q: Can you clarify the difference in definition between "universal customer" and "job seeker"?

A: On the Overall Performance Goals chart of section E of the local plan, universal access customers as a column heading includes all individual and employer customers accessing any level of services in the One-Stop system. The use of "jobseekers" on the line items of the chart is meant to distinguish individual customers from employer customers. It includes individuals in need of education, training, support services, labor market information, etc. Thus, in column 1, row A, of the chart, the count of total universal access customers equals the total count of "jobseekers."

5. MOSES Tracking?

Q: How will MOSES track a customer who has used multiple services or multiple Career Centers?

A: Although the final design of MOSES is still being developed, the basic operating principle of MOSES is that there will be one customer file that tracks all services to a customer. An individual customer is not “owned” by a particular Career Center, but becomes part of the Career Center system when they are registered in MOSES. The Career Center and the staff person providing the service are identified with the service provided. A customer can receive services from multiple centers, which will be apparent from looking at the customer’s service file.

The decision on what customers will be entered into MOSES and at what point in the delivery of services, is a local decision and should be described in the local plan narrative. The numbers entered onto the Overall Performance Goals chart in the local plan reflect these decisions.

6. Customers and MOSES?

Q: On the FY’ 2001 Workforce Investment Act, Overall Performance Goals chart how can an individual be shown in Column # 1, Total Number of Universal Access Customers and not be also shown in Column #2 as entered into the MOSES system?

A: There are various levels of reporting on customers and some flexibility for counting by LWIBs in their area. While it is anticipated that most universal access customers will provide sufficient information to be recorded as a customer on the MOSES, universal access customers using only self-service activities such as resource rooms need not be recorded on MOSES. In such situations, the count of universal access jobseekers in column 1 will be greater than the count in column 2. The chart is to help you think through the flow of people in your system.

7. 30-Day Public Comment Period?

Q: Regarding the Public Comment section; do you expect the Local Plans to be complete by the May 1st comment date, or can we use an Executive Summary?

A: Use the completed Local Plan if it is possible for you to have your plans done by May 1st, but an Executive Summary (similar to the past) is fine. You should have enough information in that summary for people to comment on and be prepared to discuss important parameters and issues.

8. Summary of Wagner Peyser Rules?

Q: Last year you distributed a handout, which included a summary and detailed rules for using Wagner Peyser funds. Do you have anything like that for this year?

A: The DET Regional Directors and LWIBs will get something that was similar to last year, which is user friendly and facilitates decisions on spending the money (especially the 10% money). The rules for the expenditure of these funds may be found in the narrative section of the Wagner Peyser Scope of services in the DET MOU instructions.

YOUTH PLANNING

1. Matrix to answer Transition fund questions?

Q: Will there be a matrix to guide us in answering the 3 questions?

A: The past two pages of the WIA Communication No. 00-02 included a matrix that provides somewhat greater detail on youth services for each of the ten WIA-required elements. In addition, Training and Employment Guidance Letter No. 3-99 from the U.S. Department of Labor provides significant guidance on the design of summer employment experiences as a part of a comprehensive service strategy. This 'TEGL' can be downloaded at:

<http://usworkforce.org/tegl-3-99.htm>

2. If local area does not apply for Transition funds?

Q: If the local workforce investment area decides not to apply for these funds, what will happen to it?

A: The Transition process is simply a way to access a workforce area's formula youth funds up to three months early. If the LWIB chooses not to apply for the transition funds, they will be made available as part of the full formula allocation that becomes available July 1, 2000.

3. Relationship of Transition money to other money?

Q: If you are releasing 25% of the youth money between April 1 and July 1, what does that mean for the rest of this year and for next year?

A: The remainder of a workforce investment board's formula youth funds (the remaining 75%) will be available beginning July 1, 2000. Taken together, these funds represent the full allocation of a workforce investment area's youth funds, and will be used to provide youth services for PY2001 – covering the fifteen month period April 1, 2000 through June 30, 2001. WIA Title I Youth funds will be made available on April 1st in all subsequent years.

4. WIB planning for summer programs?

Q: What do you suggest WIBs do about summer programs for this year? We could either:

1. quickly pull together a summer jobs program like we have done in past years, and then try to figure out how to add year round services on the 'back end'; or
2. put together a 15-month youth plan that does not begin with a summer program during 2000, but incorporates a better thought out summer plan for 2001.

A: The answer has two parts: (a) WIA requires that eligible youth have access to all ten program elements. Since summer employment opportunities (linked to academic or occupational learning) are one of the ten required program elements, some summer activities need to take place during the summer of 2000. (b) It is a local decision to determine how best to use available WIA funds to provide access to each of the ten program elements. The Youth Council/LWIB has the authority to decide that it is strategically more appropriate to develop a program that puts summer employment on the 'back end'. You should be clear in the local plan how you plan to proceed, and explain the factors that support that choice.

5. Governor's Youth At-Risk and Challenge?

Q: Have we given up on the Governor's At-Risk Summer Jobs funds?

A: These funds were not included in the Governor's proposed budget for 2001, but are included in the House budget at last year's funding level. There is additional work to be done by the House, the Senate and the Administration before a final budget is approved. CBWL will, as in past years, issue planning instructions in April based on the House budget proposal for the Governor's At-Risk and Challenge funds. Local boards will be asked to submit plans for the Governor's At-Risk and Challenge funds, and CBWL will approve local plans contingent upon final approval of the state budget.

6. Special youth projects under WIA?

Q: Will WIA also provide 'special projects' funds like we had under JTPA?

A: This question refers to how the state is planning on spending the 15% State Reserve funds for statewide youth activities. A portion of the JTPA 8% education coordination funds were made available on a competitive basis for local programs. Decisions on how the WIA funds will be spent have not been finalized yet. Our advice is that LWIBs and Youth Councils should not count on any additional funds for the summer of 2000.

It is CBWL's desire to coordinate some of these funds with resources that are available from other state partners. In addition, there may be other local resources that can support WIA youth. For example, the Department of Education has special grants for youth who are at-risk of not passing MCAS. Youth Councils could connect with School District Superintendents to develop a unified Summer Youth Program that builds on a combination of WIA and DOE funds.

7. JTPA carry-in money?

Q: If we have JTPA carry-in money, will it be carried in without stipulations?

A: Yes. As of July 1, 2000, all local JTPA formula funds, not needed for JTPA closeout purposes, will roll over into WIA. It is likely that the JTPA funds will have to be 'sent back' to the state during the JTPA closeout period, but we would then turn right around and send them back to local areas as a distribution of WIA funds.

There are differences in JTPA and WIA administrative costs limits (only 10% in WIA). JTPA funds carried forward into WIA, however, lose their JTPA cost category identity and become WIA funds with 10% administration. It seems clear that there is an incentive to spend down JTPA administrative funds before the carry-forward to WIA.

Also, keep in mind that WIA requires that at least 30% of program funds must be spent on services to out-of-school youth. This minimum will be calculated on the combined total of 'rolled over' JTPA funds plus FY2001 WIA funds.

8. Occupational Training for Youth?

Q: Since Individual Training Accounts are not allowed for youth participants is there a way to provide occupational skill training for appropriate youth using WIA Title I youth funds (in cases where it is not desirable to enroll the participant in the adult program)?

A: Yes. Youth service providers that are selected pursuant to WIA §123 may include providers of occupational training.

Afternoon Session

MOU INSTRUCTIONS

DOE

1. ABE providers to sit on the LWIB?

Q: Are the Adult Basic Education providers the DOE/ABE people who will now sit on the LWIBs?

A: A process between the DOE and the CEO in each region has been instituted to define the holder of the ABE seat on each LWIB. A list of DOE-preferred candidates was sent to each CEO; decisions are being finalized by CEOs now.

2. DOE signatory on 16 local MOUs?

Q: What kind of role will Bob Bickerton play as the signatory of the 16 local MOUs?

A: Bob Bickerton will negotiate and sign all MOUs with LWIBs. Local DOE providers will not negotiate MOUs because they do not have the authority to allocate resources beyond their individual agencies. A representative of a local service provider will hold the seat on the LWIB and participate in the partnership; that representative will receive guidance from the MDOE in performing this role.

3. How to begin process of negotiating DOE MOU?

Q: How do we begin the process of negotiating the local DOE\ABE MOU?

A: Call Bob Bickerton at (781) 338-3300. If you have difficulty reaching him, you can call Andrea Perrault at (781) 338-3852.

MRC

1. MRC contributing?

Q: Why isn't MRC contributing money?

A: MRC's decision was based on the fact that there our federal regulations require us to use our monies for MRC clients. We also received a \$1.7 reduction in funding and currently have a waiting list for services.

2. What are we negotiating with MRC?

Q: If MRC (or any other partner) is not contributing money, then what are we negotiating?

A: Our staff can assist Career Centers with serving customers with disabilities and provide cross-training and cross-referrals.

DET

1. Who will Sign MOU for Veterans?

Q: Who will sign the Veterans MOU with the DET?

A: The DET Area Director will negotiate the local Veterans MOU. The language of this MOU mirrors the MOU that DET signed with USDOL. The signatories to this MOU are the DET Area and Regional Directors, the Chief Elected Official and the LWIB Chair.

2. How many MOUs will there be for DET?

Q: When local areas are negotiating with DET, how many MOUs will there be?

A: A Memorandum of Understanding must be developed for each of the required partners under WIA, as well as for any additional WIA partners. DET has determined that there will be a separate MOU, each with its own scope of services, financial commitments and signatures for each of its three programs, Wagner Peyser, Unemployment Insurance and Veterans..

3. Clarify Telecommunications Costs?

Q: Can DET clarify why there is no option on the Telecommunications costs?

A: Currently (in FY2000), for some Career Centers; but, not for all Career Centers; DET pays Bell Atlantic directly for local telephone service and MCI directly for long distance telephone service. In FY2001, DET will continue to retain funds from the applicable WIB funding allocations in order to pay these bills. Total dollar amounts and instructions are being communicated to all concerned. In the future, DET will consider the petition of an LWIB requesting that the LWIB assume these local telephone service and long distance telephone service costs directly. In addition, DET is now, or will be by July 1, 2000, paying the on-going costs associated with data circuits. Funds required to pay these on-going data circuit costs in FY2001 will also be retained by DET from the applicable WIB funding allocations. The dollar amounts and instructions are being communicated to all concerned.

4. Veterans to Share Premises Costs?

Q: Will the Veterans share the premises costs?

A: No. The Veterans' program's shares of the premises' costs will be charged to Wagner-Peyser 90% and should be budgeted accordingly per the DET MOU Instructions. However, other non-personal services (NPS) costs (see section D in the DET MOU Instructions and related attachments and memoranda) associated with the Veterans' programs are to be charged to the respective Veterans' programs.

5. Reconciliation of Costs?

Q: Budgeted costs are estimates and, then, reconciled once the actual costs are known. Can this reconciliation occur on a more timely basis so that the WIBs are informed earlier as to the amount of funds they have been authorized to carry-forward from one year to the next (especially, from FY2000 to FY2001)?

A: Yes. DET apologizes for the amount of time it has taken to communicate dollar amounts authorized to be carried-forward from FY1999 to FY2000. Assuming that communication from the LWIBs to DET regarding expenditures, etc. is timely, DET pledges to have the cost reconciliation completed by September 29, 2000, and authorized carry-forward amounts communicated to the WIBs the following week.

6. Deficits?

Q. Can you explain how it is possible to operate so as to end a Fiscal Year with a deficit?

A. DET cannot incur a deficit. DET is required to pay DET staff working in a collaborative Career Center and, therefore, may need to make a payment for staff hours that cause an LWIB allocation to be over-expended. However, DET reconciles at a statewide programmatic level and includes in that reconciliation the recovery of the over-expended dollars from the LWIB.

7. Deficits at the Hurley Building?

Q. Are the deficits incurred within the Hurley Building?

A. (See the answer to question #6.)

8. Carry-in 10% of 10%?

Q. Can we carry-in up to 10% of the Wagner-Peyser 10% funds?

A. REBs / LWIBs cannot carry forward from FY1999 to FY2000 any Wagner-Peyser 10% dollars. Neither are REBs/LWIBs being required to have any Wagner-Peyser 10% deficit incurred in FY1999 to be deducted from its FY2000 Wagner-Peyser allocation. At the end of FY2000, LWIBs may carry forward into FY2001 up to 10% of the Wagner-Peyser 10% allocation. If an LWIB ends FY2000 with a Wagner-Peyser 10% deficit, that entire deficit amount will be deducted from that LWIB's FY2001 Wagner-Peyser 10% allocation.

CBWL

1. Risk of lower allocations w/o wage data?

Q: Are we at risk of lower allocations if we can't get the UI wage data for performance measures?

A: The performance measures for WIA require the use of UI wage records for many of the calculations. The current lack of UI wage records has raised the question as to how the Commonwealth will be able to submit the required annual statewide report to USDOL on such measures. Failure to meet such requirements can result in sanctions, including the withholding of a percentage of the state's allotment. There has been progress made recently on this issue and we have an agreement with DOR to begin receiving the wage data we need.

2. Cost indicators in performance?

Q: Since there are not cost indicators in the performance, is it up to the local level to make those decisions?

A: The local WIB must decide how Title I funds can be used to best support the mixture of core, intensive and training services. Local decisions may include spending a wide range of Title I funds on the costs of informational and self-service core services, which would serve customers that would not be counted in performance measures. Local WIBs may make other types of resource sharing decisions, such as reserving a large share of Title I funds for intensive and training services. There are no cost indicator "standards" for Title I to ensure the flexibility needed by local WIBs.

3. TAA or NAFTA representation on the LWIBs?

Q: Who will represent TAA or NAFTA on the LWIBs?

A: Local Rapid Response staff.

4. North Central adult allocation?

Q: What does an area that has very little adult allocation money, like North Central, do?

A: That is a local decision. Both Adult Worker and Dislocated Worker funds can be used to cover an individual's services, but there cannot be a transfer of Youth funds.

5. Cost allocation plan?

Q: Is there a Cost Allocation Plan with the CBWL Plan?

A: Cost allocation must be decided at the local level in accordance with WIA Communication No. 00-13: Cost Allocation Plan. There is an integrated budget for multiple partners in the Local Planning Instructions. There is an MOU budget summary for Title I services in CBWL's MOU Instructions. Both the Title I portions of the integrated budget and the Title I MOU budget summary must conform to the local Title I cost allocation plan (CAP).

6. Transfers?

Q: Will local areas be able to transfer money between JTPA titles before the carry forward into WIA Title I Youth, Adult and Dislocated Worker funds?

A: Yes. JTPA funds available at the end of this program that are not needed for close-out activities will be carried forward as WIA Title I funds in their corresponding program streams. Title IIA funds become adult funds, Title III funds become dislocated worker funds, and Title IIB and IIC funds become youth funds. JTPA funds may be transferred between titles, up to the current JTPA limits, prior to the carry-forward to WIA.

MOUs in general

1. Agreement among state partners on money or resources to share?

Q: In theory a local WIB can negotiate anything they choose. As Career Centers move forward to negotiate how much money they will get from each of their partners, is there any agreement at the state level as to how much money or what resources each of the partners will contribute?

A: We are working towards that end (see below); however, there is information in the packages you received today which will help you to begin that process.

2. How many MOUs do we need to submit with the local plan?

Q: How many MOUs do we need?

A: The Workforce Investment Act requires that an MOU be executed between the LWIB and each of the One-Stop career center partners with the agreement of the CEO. In Massachusetts, it has been determined that a single “umbrella” MOU may be developed that addresses the overarching issues relating to the local OSCC delivery system for the LWIB and all partners and includes scopes of service for partners programs that are party to the document or the LWIB and the partners may decide to enter into separate MOU agreements between the LWIB and one or more OSCC partners.

Based upon the LWIB’s approach to structuring their MOU document(s), to be in compliance with Section 121 (d)(2)(A)(ii) of WIA, at minimum, either scopes of service must be included in an “umbrella” MOU or separate MOUs for 3 required partner programs must be submitted as attachments to the local plan.

3. Appeal process?

Q: If LWIBs cannot get a required partner to negotiate, what is the appeal process?

A: It can be brought to the state level for resolution.

4. Partners not present today?

Q: There are partners who are not here today. Who do we deal with at the local level to negotiate these partnerships?

A: Refer to WIA Communication No. 00-03, Attachment A for a listing of entities providing required partner programs in Massachusetts. Efforts are underway to develop state-level interagency agreements. State-level interagency agreements should clarify state agency partner contributions to local One-Stop systems. Should a state agency partner not enter into a state-level interagency agreement, local areas will not be expected to negotiate a local MOU.