

Ohio ABLE One-Stop System Memorandum Of Understanding (MOU) Implementation Guide FY 2004



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Table of Contents

| | Page |
|---|------|
| Introduction | 2 |
| Purpose | 2 |
| Proposed Workforce Investment Area Configuration | 2 |
| Required Partners of One-Stop System | 3 |
| One-Stop MOU Development Process | 4 |
| One-Stop Core/Intensive/Training Services | 5 |
| Core Services | 5 |
| Intensive Services | 6 |
| Training Services | 6 |
| Resource Sharing and Cost Sharing | 7 |
| Resource Sharing | 7 |
| Cost Sharing | 7 |
| Proportionality | 8 |
| Limitations on Local Administrative Costs under WIA Title II | 10 |
| Costs of other Administrative Responsibilities under WIA Title II | 10 |
| Allowable Costs under WIA Title II | 10 |
| Inability to Execute a Local One-Stop MOU | 11 |
| Appendices | 12 |
| A. Ohio's Workforce Development System Map (Version 12/8/03) Effective July 1, 2004 | |
| B. Area 7 MOU Guidance & Templates for Local Regional One-Stop Systems (Revised 11/20/03) | |

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Ohio ABLE One-Stop System Memorandum of Understanding (MOU) Implementation Guide – FY 2004

Introduction

The foundation of the comprehensive reforms made possible by Title I of the Workforce Investment Act (WIA) of 1998, Public Law 105-220, is the creation of a One-Stop delivery system. The purpose of the system is to make it easier for individuals and employers to access education and training services, as well as a diversity of other resources that help to build the capacities of communities to sustain economic and workforce development.

Ohio Adult Basic and Literacy Education (ABLE) programs, supported by WIA Title II, the Adult Education and Family Literacy Act (AEFLA), are required partners of Ohio's One-Stop delivery system.

The One-Stop provisions of WIA Title I offer ABLE programs and other partners exciting opportunities to expand customer access to programs and services and to help them to operate more efficiently. By working collaboratively, One-Stop partners will collectively achieve goals that they may not be able to accomplish by working independently.

With funding and other resources being increasingly difficult to secure and maintain by Ohio's respective workforce development delivery systems, it makes good economic and social sense to integrate a portion of these limited funds and other resources to maximize our return on our investments through the creation and implementation of One-Stop Systems.

Purpose

This guide is meant to assist local ABLE programs in the local One-Stop Memorandum of Understanding (MOU) negotiations. This information is meant to be complimentary to the information provided by the Ohio Department of Job and Family Services (ODJFS) that formally supports the development of a local One-Stop MOU. The ODJFS information is available through www.ohioworkforce.org.

For specific guidance to One-Stop questions/issues that may not be addressed in this guide, please feel free to contact Jeff Gove, State ABLE Consultant, Ohio Department of Education, at (614) 466-5015 or Jeff.Gove@ode.state.oh.us or your regional State ABLE Consultant.

Proposed Workforce Investment Area Configuration

The Ohio Department of Job and Family Services (ODJFS) administers WIA Title I, and as such, Ohio's One-Stop System is intended to be established in the following way, effective July 1, 2004. By this date, Ohio will have established 31 workforce investment

area One-Stop Systems. This 31 system configuration will be made up of 20 conventional area One-Stop Systems and one large regional One-Stop System known as Area 7. Area 7 will be comprised of 12 regional One-Stop Systems (see Appendix A). Each of the 31 One-Stop Systems will be expected to have a signed Memorandum of Understanding (MOU) that will be submitted to the ODJFS for review and approval. Specifics of this system include:

- 31 Level 2 One-Stops

A Level 2 One-Stop satisfies the requirements of WIA for a One-Stop System in a single physical location. This facility has a fully-functioning Resource Room as well as all the required partners and services available on-site. It has a signed MOU that also articulates costs and resource sharing. A Level 2 One-Stop is also known as a “full service, comprehensive One-Stop center.”

ABLE must be represented in a Level 2 One-Stop MOU. This can be a minimum of one ABLE program or a consortium of ABLE programs. This is a local decision or can be negotiated by the State ABLE Office if a local decision cannot be made.

- 67 Level 1 One-Stops

A Level 1 One-Stop possesses a minimum of three required partners, which allows for regular customer access to on-site services and a fully-functioning Resource Room. The remaining required partners’ services are available either electronically or via some type of agreement with a nearby Level 2 or Level 3 One-Stop. Level 1 One-Stops are also represented as part of a One-Stop System MOU that articulates costs and resource sharing as part of its approved content.

ABLE may or may not be represented in a Level 1 One-Stop site. This should be defined in the overall One-Stop System’s MOU and is a local decision.

- Level 3 One-Stops

Currently, there are no designated Level 3 One-Stop Systems. The actual number of Level 3 One-Stops will be determined as the state’s system is implemented. This level is more advanced than that of a Level 2 One-Stop System. This One-Stop will satisfy WIA requirements for a One-Stop System in a single physical location. In addition, this One-Stop System also incorporates activities such as: integrated services, continuous improvement initiatives meeting Baldrige criteria, (achieve levels of best practices - documents and/or processes), enhanced services, or additional partners above the required WIA partners.

ABLE is a required partner in a Level 3 One-Stop System.

- 98 total Levels 1 and 2 One-Stop Systems Statewide – projected by July 1, 2004

Required Partners of One-Stop System

For Level 2 and Level 3 One-Stop Systems, ABLE (WIA Title II-funded programs) is a required partner. The requirement is for at least one ABLE program be represented in the MOU. Where there is more than one ABLE provider serving a One-Stop site system, all

ABLE programs may participate in the MOU process and/or one ABLE program be designated as the required partner, representing the interests of all ABLE programs serving that site or system. This is a local decision or can be negotiated by the State ABLE Office if a decision cannot be made. ***The State ABLE Office recommends that all ABLE programs and their partners be knowledgeable about Ohio's One-Stop requirements and system.***

Other WIA Title I required One-Stop Level 2 and Level 3 partners include:

- WIA Programs
- Ohio Works First /Temporary Assistance to Needy Families Program
- Postsecondary Vocational Education (Perkins Act)
- Ohio Rehabilitation Services Commission
- Wagner-Peyser Act
- Unemployment Insurance Program
- Trade Adjustment Assistance
- Veterans Programs
- Community Service Block Grant Employment and Training Programs
- Older Americans Act - Title V Program
- Housing and Urban Development Employment and Training Programs
- Social Security Act – Welfare to Work Program
- Jobs Corps and/or Civilian Conservation Corps
- Native American Grant Program
- Migrant and Seasonal Farm Workers Program
- Veteran Employment & Training Programs under WIA Title I
- Youth Opportunity Grant
- Demonstration/Pilot Programs
- National Emergency Grants (Department of Labor)

One-Stop MOU Development Process

The Ohio One-Stop MOU process is currently taking place around the state. The anticipated completion date for all statewide One-Stop MOUs is March 29, 2004. The effective date of these MOUs to be implemented is July 1, 2004. These negotiations are being driven locally, with guidance and facilitation conducted by ODJFS State One-Stop staff most notably, Tom Hutter and Sue McKittrick.

It is the shared responsibility of the local administrators of workforce development agencies, ABLE programs and other required partners to determine when and where these planning meetings will take place. ***ABLE programs should attend these meetings.***

When ODJFS is used for facilitation, the One-Stop MOU process is usually broken into ***three phases***. The ***first phase*** is completion of a matrix, Worksheet A – Partner Services Responsibilities. This phase asks the partners to identify their combined capacity to deliver Core, Intensive and Training Services within their One-Stop System. The ***second phase*** includes convening local business leaders to discuss what their needs are from the overall One-Stop System. The ***third phase*** asks the partners to determine their cost and resource sharing to support the implementation of their One-Stop System. This is

facilitated by the completion of another matrix, Worksheet B – Resource/Cost Sharing Agreement.

These matrices and other One-Stop MOU guidance are available at www.ohioworkforce.org (Also see Appendix B).

The completion of these three important phases of One-Stop MOU negotiations may take many meetings over an extended period of time. ***It is best for all partners, including but not limited to ABLÉ, to be involved in this entire process, if at all possible.***

Note: No ABLÉ program is required to sign any One-Stop MOU until the director is satisfied with the contents of such an agreement as it relates to its articulated partner responsibilities. If in doubt, please contact Jeff Gove, State ABLÉ consultant at (614) 466-5015 for guidance or your regional State ABLÉ Consultant.

One-Stop Core/Intensive/Training Services

Level 2 and Level 3 One-Stop Systems must provide Core, Intensive and Training services to customers. These are:

Note: In the list below the three ***bolded and italicized core services*** are those that are most applicable to local ABLÉ programs, and WIA Title II requires ABLÉ programs to make available as part of the One-Stop System. ABLÉ programs can provide more than these three core services, and many do, but this is to be decided as part of the MOU negotiation process. Remember, too, there may be other required One-Stop partners that also provide skill assessments as part of their services, as well as other similar services to those of other partners. If so, it should be decided who offers what services to whom, when, how, etc. to reduce duplication and maximize available resources from all partners.

Core Services

Core services are available to everyone and include:

- Eligibility for WIA funding sources
- Outreach, intake and orientation
- ***Initial assessment of skill levels***
- Job search/placement assistance
- Labor Market Info (LMI) and job vacancies
- ***Performance and cost information on eligible training providers (may include ABLÉ)***
- Local Performance measures info
- ***Availability of support services***
- Information regarding filing Unemployment Compensation claims
- Information on One-Stop partner services
- Follow-up services
- Others defined by local area

Note: WIA Title II-ABLÉ federal legislation requires 95% of its federal funds to be used by local ABLÉ programs to support direct student instruction. Therefore, 5% of the remaining federal funds may be used for administrative costs, including those to

support One-Stop administrative costs. This percentage is negotiable, within reason, between the local ABLÉ administrator and his/her State ABLÉ Consultant (see limitations on Local Administrative Costs under WIA Title II, page 10).

Intensive Services

These services are targeted to unemployed and other at-risk people who are unable to obtain employment through core services. These include:

- Comprehensive and specialized assessment
- Development of Individual Employment Plan (IEP)
- Group counseling
- Individual counseling and career planning
- Short-term prevocational services - life skills
- Others as defined by local area

Note: ABLÉ programs may have some capacity to provide some of these Intensive Services, but they are not required to be provided by WIA Title II. This would be a local decision as part of the One-Stop MOU negotiation process.

Training Services

These services are targeted to adults who have met eligibility requirements for intensive services defined by the local One-Stop System. These services provide more in-depth and comprehensive training and support to eligible adults and may be subcontracted to One-Stop System partners and/or other local providers. They include:

- Occupational skills training
- On-the-job training (OJT)
- Workplace and cooperative education
- Private sector training
- Skills upgrading and retraining
- Entrepreneurial training
- Non-traditional training
- Job-readiness training
- ***Adult Education and Literacy (ABLE) programs***
- Customized training
- Incumbent worker training
- Others as defined by local area

Note: In addition to the bolded ABLÉ services above, some ABLÉ programs may be collaborating within their host organizations (JVS, CTC, Career Center, college, LEA, CBO) to provide some of these other Training Services. If so, these could be identified in the ODJFS' Worksheet A - Partner Services Responsibilities, in ***phase one*** of the One-Stop MOU process.

See Note related to Core Services about WIA Title II-ABLE legislated fiscal requirements on page four of this guide.

Resource Sharing and Cost Sharing

As with any business venture, it is essential that financial plans are developed for One-Stop Systems. A sound financial plan not only identifies how current operating costs will be covered, but how future growth of the system will be funded. These MOU agreements, specifically Worksheet B, Resource/Cost-Sharing Agreement, are blueprints for the financial success of the One-Stop. On the most basic level, these MOU agreements keep all One-Stop partners in compliance with WIA federal legislation. Every One-Stop MOU must include a description of how the cost of services and operating costs will be paid.

One-Stop MOUs are more than compliance documents. They serve as true business and financial plans, leading to successful integration of partners' services to customers, ultimately benefiting the local workforce investment area. The most successful One-Stop partnerships are those built upon trust. Partners need to know what is expected of them and what other partners will provide.

Prior to beginning the partner discussion on resource/cost sharing, it is important to define two key concepts so all partners understand their responsibility in sharing the operational costs of the One-Stop System. Resource Sharing and Cost Sharing should be viewed as two distinctly different concepts when determining partner commitments.

Resource Sharing

Resource Sharing is a fully integrated approach in which all partners share in the responsibility of providing services to prevent duplication and create a seamless delivery system. This is defined as "*shared services*" where each partner contributes, through programmatic services (like ABLE), to some aspect of the overall One-Stop System for the good of all customers and partners. Through this participation, each partner may benefit from the services that another partner provides. This participation is captured in a "Shared Services" pool in Worksheet B with a value of "time," generally reflected in hours or as Full-Time Equivalent (FTE), allocated to each benefiting partner. In Worksheet A – Partner Service Responsibilities, the partners identify the programmatic services to be delivered and how and when they would be delivered. Worksheet B captures the time commitment of each partner toward these services. For purposes of the MOU, there is not a "dollar" value associated with the provision of program services (like ABLE) through direct delivery staff, only the "time" value. **It is an individual partner's decision as to how its specific program costs are determined. A partner should follow the requirements set forth in its respective federal/state and/or local legislation and guidelines, e.g., for ABLE, WIA Title II and the local program's approved grant.**

Cost Sharing

The second concept, Cost Sharing, focuses on the shared operational expenses of the One-Stop System and is identified in "dollar" amounts. This includes both system-wide costs such as outreach, and individual physical site costs such as rent or lease. These costs are reflected in the specified cost pools, identified in Worksheet B, e.g., Facilities, Management, Resource Room, Equipment and Supplies, Outreach and Marketing, and Misc. The partners decide on those expenses that benefit and are relevant to each of the partner programs. Each partner will be initially assessed a "dollar" value responsibility.

This “dollar” value responsibility becomes a funding commitment for the partner and may be in the form of cash or in the provision of goods or services consistent with the agreed upon budget.

Ideally, the One-Stop MOU Worksheet B is the last part of the development process. In many ways, it is the most important one. A vision for the site(s) and system, including the full array of partner services to be provided (One-Stop MOU Worksheet A) should be in place prior to a discussion of financing the system (One-Stop MOU Worksheet B.)

As a required One-Stop partner, an ABLE program must ensure that a portion of the ABLE funding is made available by providing services, or through other means, to “create and maintain the One-Stop delivery system” (20 CFR S662.230(b)(1)). These funds or services contribute to the One-Stop delivery system and are negotiated locally with the Local WIA Board as part of the MOU.

Decision making and negotiation with regards to cost sharing must take into account the following factors:

Proportionality

WIA regulations require that each One-Stop partner contribute a fair share of the operating costs proportionate to the use of the system by customers who are attributable to the partner’s program (20 CFR 662.270). The determination of a methodology to allocate “fair shares” among partners is a critical step in the MOU negotiation process.

Federal regulations do not prescribe exactly how this is to be done in an MOU negotiation. In fact, the regulations make it clear that partner agencies may choose any number of methods, provided they are consistent with the Office of Management and Budget (OMB) circulars. Any method(s) used must be based on consistent data over time.

Agreeing on a budget is the first step. Determining the proportionate share attributable to the partner programs is the second step in this process. Here, the partners review the shared costs budgets, determine which methodologies are acceptable by the partners and then which method(s) should be applied to determine these shared costs.

The most common methodologies currently being applied in Ohio One-Stop System MOU negotiations are the occupancy and position usage applications, which are based on square footage and FTE respectively. An ABLE example of an allocation methodology using FTE may be:

Position Usage – Based on partners’ FTE staff stationed at the One-Stop site. Partners with part-time staff stationed at the One-Stop are calculated based on FTE.

| | ODJFS | WIA Title I | CDJFS | ABLE | ORSC | AWE | Total |
|---------------------|-------|----------------|-------|------|------|------|-------|
| # of FTE | 3 | 3 | 3 | .5 | 1.5 | 2 | 13 |
| % of overall FTE | 23 | 23 | 23 | 3.9 | 11.6 | 15.5 | 100% |

Using position usage (FTE) methodology, a percentage is derived, in this example a .5 FTE for ABLE, to apply toward operating costs of the One-Stop System. This relates to the Cost Sharing information on the previous page. This is different from actual staff time devoted to “Shared Services” that would be reflected in Worksheet A. Staff used for “Shared Services” is considered Resource Sharing, e.g. an ABLE class operating in a One-Stop facility, not Cost Sharing. The ABLE class costs located at a One-Stop facility would be attributable to the ABLE program budget. These costs would be considered like any other ABLE class site costs.

If an ABLE program chooses to use its own budget to support One-Stop System staff in a support and/or greeter capacity, these ABLE funds would be charged to ABLE administrative costs, not direct instructional costs. This is acceptable but impacts the administrative cap of 5% applied to all ABLE budgets, and has to be negotiated with the appropriate regional State ABLE Consultant. A benefit of this ABLE budget support is that the cost to support these staff functions would be considered in lieu of cash payments to the One-Stop System.

Some common One-Stop System Cost Sharing examples paid out of ABLE budget administrative funds include:

- Facilities Cost Pool (e.g. rent, utilities, maintenance)
- One-Stop Management Cost Pool (e.g. Receptionist/Greeter, Data Entry/Support Staff, Technology Support Staff, Fiscal Support Staff)

Some common One-Stop System Cost Sharing examples paid out of ABLE budget direct service (non-administrative) funds include:

- Resource Room Cost Pool (e.g. copier and supplies, fax Internet Access, etc.)
- Outreach/Marketing Pool (e.g. brochures, fliers, orientation materials, signage)

Some other examples of methods (allocation bases) for determining proportionate share include:

- Use of data elements from a common intake form (if available)
- Time distribution (time sheets)
- “Equal Access” (equal benefit to all partners)

Some standards that should be considered when negotiating both Resource and Cost Sharing include:

- Different methods may be used for different costs and/or activities. Certain costs are pooled together and different methodologies may be applied to these cost pools, e.g. Facilities, including rent, utilities and maintenance costs. The allocation plan developed by the partners in the MOU must contain a description of the allocation methodologies used to distribute the shared costs. Periodic reconciliation of actual costs, including adjustments, needs to occur at least quarterly.
- Each partner must pay an amount equal to its share of the costs.

- No partner may pay for a cost that does not benefit its program as determined in the Cost Allocation process.
- No program may pay for a cost that is unallowable under its governing statutes and limitations. See following guidance about this.
- Costs may not be allocated to all partners if the costs benefit only one program or if the costs of the activity serve a single program purpose.

The availability of goods and/or services as a contribution and their use in funding One-Stop operations is a local decision that must be made and agreed to by all partners involved in the MOU. This is based on local program needs. The goods and/or services provided by each partner must be identified and supported through **shared costs** of the One-Stop.

To reiterate, the ABLE contribution must be “proportionate to the use of the system by individuals attributable to” the ABLE program (20 CFR S662.270). The method of attributing persons to an ABLE program is negotiated as part of the MOU (S662.250(c)). Other related considerations, such as how the system is used by attributable persons, including the level or intensity of services that are provided to them, may be considered in applying the principle of proportionality. Another issue to address may be the application of how this principle is applied to persons who participate in or enroll in multiple One-Stop partner programs.

Limitations on Local Administrative Costs under WIA Title II

Contributions to the operating costs of the One-Stop delivery system, such as rental costs of facilities used by administrative staff, are considered administrative costs under WIA Title II, as defined in section 233(a)(2). The amount of federal funds available under section 231 of WIA Title II for non-instructional purposes is limited to 5%. This amount, in most cases already budgeted in local ABLE approved grants, may be negotiated to a higher percentage, within reason, between local ABLE programs and their regional State ABLE Consultant to help support their required One-Stop partner roles.

As identified earlier, some One-Stop MOU costs can be identified in ABLE program budgets as direct service charges, such as some Resource Room costs, supplies, outreach/marketing, etc., but not ABLE administrative charges.

Costs of other Administrative Responsibilities under WIA Title II

Local ABLE programs have other administrative responsibilities and must meet state and federal requirements, e.g., administrative staff costs, rent, utilities, data management, etc. ABLE administrators must retain a sufficient amount of their WIA Title II administrative funds and/or other funds from other sources to support these grant functions.

Allowable Costs under WIA Title II

Local ABLE programs may only contribute funds toward One-Stop costs that are allowable costs under WIA Title II and the Ohio Department of Education regulations.

ABLE does not allow its funds to be used for the acquisition of real property or construction.

Note: The local ABLE program(s) and local WIA Board may determine the amount and manner of the contribution within these above-referenced parameters. ABLE contributions may be made directly through a transfer of funds or provided through the provision of goods and/or services.

Inability to Execute a Local One-Stop MOU

One-Stop participation requirements are set forth in both WIA Titles I and II. ABLE programs have a responsibility to fulfill the applicable One-Stop requirements in both sections of this federal legislation, as stated earlier.

It is required by 20 CFR S662.310(b) that either the State ABLE Office or local ABLE programs enter into “good faith negotiations” with local WIA boards to develop and implement One-Stop MOUs that meet the requirements of WIA Title I. These negotiations must be documented. If an impasse develops, local ABLE programs may request assistance from the State ABLE Office to help resolve this impasse. By law, a local ABLE program must at least inform the State ABLE Office if it has reached such an impasse. A local ABLE program cannot be represented on a local WIA board while their MOU is at an impasse. Further, any local area that has failed to negotiate an MOU with all required partners is not eligible for WIA Title I State Incentive Grants until such time as the MOU impasse is resolved and approved.

In summary, WIA Title II-funded ABLE programs are required Ohio One-Stop System partners, and as such, should negotiate in good faith, as a local partner in the Ohio One-Stop System MOU implementation process. The State ABLE Office is available as a resource to assist local ABLE programs with these negotiations. The ultimate benefactors of our collaborative successes are the customers who are provided with high quality One-Stop System services as the customers pursue economic and social self-sufficiency.

Sources

1. *One-Stop Comprehensive Financial Management Technical Assistance Guide, USDOL, E&T Division, July 2002*
2. *ODJFS One-Stop System Certification - Version 1.0, 2003*
3. *State of Ohio ODJFS Workforce Investment Act Memorandum of Understanding (MOU) Guidance and Template, Revised Dec. 2, 2002*
4. *Illinois Cost Allocation/Resource Sharing Guide for Workforce Investment Act Partners, September 2002*
5. *OVAE Program Memorandum 99-14, Patricia W. McNeil, assistant secretary of education, “Responsibilities and Opportunities Created by Title I of the Workforce Investment Act of 1998”, June 1, 1999*

Appendices

Ohio's Workforce Development System

Version 12/8/03

Effective: July 1, 2004



□ 31 Full Service Comprehensive One-Stop (Level 2)

△ 67 Satellite/Access Points (Level 1)

98 Total One-Stop Access Points Statewide

● 20 Workforce Investment Areas

* Provisional Level 2 One-Stop (Partner meetings still ongoing)

Currently involved with facilitation regarding involvement in One-Stop System

AREA 7 MOU GUIDANCE AND TEMPLATES FOR LOCAL REGIONAL ONE-STOP SYSTEMS

(Revised 11/20/03)

Background: One of the requirements for designation as a conventional workforce investment area is the submission of an MOU that is reflective of the entire One-Stop System within an area's designated boundaries. In the conventional Workforce Investment Area #7 there are currently twelve (12) local regional One-Stop Systems that each include a comprehensive (Level 2) site in addition to a number of affiliate (Level 1) sites. The Area 7 Workforce Investment Board passed a resolution at the 6/2/03 quarterly meeting for the development of a uniform MOU inclusive of all local regional One-Stop Systems. In the subsequent months, state level partners participated in a series of meetings to address this resolution and develop the Area 7 MOU templates.

Area 7 MOU Recommendations: The partners recommended the Area 7 MOU should basically follow the model MOU Guidance and Template (version 12/02/02) available over the www.ohioworkforce.org website but with some additional modifications. These modifications primarily affect the Worksheets A & B associated with the model MOU that address (A) Partner Service Responsibilities and (B) the Resource/Cost Sharing Agreement (*updated Area 7 Worksheet A & B Models are attached*). The overall recommendations were:

- (1) the worksheets reflect Area 7 specifics regarding detailing of groups of services and common cost pools to be used for each local regional system;
- (2) the worksheets be modified to reflect multiple site areas within each local regional system; and,
- (3) the local regional systems follow a standard format for including the attachments for each of the worksheets that reflect the local system processes.

Area 7 MOU Responsibilities:

Area 7 Workforce Investment Board:

- Completion of the overall body of the MOU, which includes:
 - purpose
 - period of relevance
 - introduction/background
 - mission and vision statements
 - parties to the MOU, including identification of the fiscal agent and One-Stop Operator(s)
(*some information provided locally*)
 - general provisions and clauses
 - master signature page.
- Coordination and compilation, into a single MOU, all of the information provided by the local regional systems.
- Oversight and maintenance of the MOU, including amendments.
- Reports reflective of the MOU.

Area 7 MOU Responsibilities (con't):

Local Regional One-Stop Systems:
(***Submit only the following information to the Area 7 Board***)

- Information relevant to the body of the MOU, including the identification and information regarding specific local partners as parties to the MOU, local system policies and procedures, name and address information regarding the physical sites within the system, and the local partner signature page reflecting agreement with the locally developed Worksheets A & B and local policies and procedures.
- Worksheet A: Partner Service Responsibilities (Area 7 Model) matrix of services including the following attachments:
 - Worksheet A-1: Partner Service Responsibilities Narrative (Area 7 Outline)
 - Worksheet A-2: (*locally specific*) Customer Work Flows - Job Seeker and Business
(including information on methods of referral)
 - Worksheet A-3: (*locally specific*) Common Intake/Referral Form(s)
- Worksheet B: Resource/Cost Sharing Agreement (Area 7 Model) including the following sections:
 - I. Identification of Shared Costs
 - II. Allocation Methodology
 - III. Application of Methodology(ies) to Shared Costs
 - IV. Partner Commitments
- Coordination and collaboration with Area 7 Board and Fiscal Agent on MOU relevant items.

Guidance Attachments:

- Local Regional One-Stop System Information
 - I. Parties to the Memorandum of Understanding
 - II. Local One-Stop System Sites
 - III. Local One-Stop System Policies and Procedures
 - IV. Local One-Stop System Signature Page
- Worksheet A - Partner Service Responsibilities Matrix (with attachments)
- Worksheet B - Resource Cost/Sharing Agreement (Guidance and Templates)

Submittal Instructions:

All documents to be completed using Microsoft WORD and EXCEL software.

Deadline: March 29, 2004.

Submit both hard and soft copy to:

Area 7 Board - MOU
c/o ODJFS - Office of Workforce Development
145 S. Front St., 6th Floor
Columbus, OH 43215
Attn: Mark Birnbrich

Local Regional One-Stop System Information

Area #7 - _____

I. Parties to the Memorandum of Understanding: The partners for the above identified Area 7 local regional One-Stop System are as follows:

Required One-Stop System Partners:

WIA Title I Programs (Adult, Dislocated, Youth)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

WIA Title II Program(s) (Adult Education and Family Literacy)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

WIA Title III Programs (Wagner-Peyser, TAA, UI, Reemployment Services, Veterans E&T)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

WIA Title IV Program (Vocational Rehabilitation Services)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Older Americans Act Title V (Senior Community Employment Services)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Carl Perkins Vocational & Applied Technology Education Act (Post Secondary Voc Ed)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

TANF (Ohio Works First, Prevention/Retention/Contingency Programs)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Community Services Block Grant (CSBG) (Employment and Training Programs)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Housing & Urban Development (HUD) (Employment and Training Programs)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Welfare-to-Work Programs (Social Security Act Section 403(a)(5))

Name:
Address:
Phone:
E-mail:
Local Contact Person:

**Other WIA Title I Programs
(Job Corps, Native American Program,
Migrant/Seasonal Farm Worker, Veteran's
Workforce, National Emergency Grant,
Demonstration Pilot Programs)**

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

(Note: Please indicate here those required programs
that are not available in your local area.)

Non-Required One-Stop System Partners

(i.e., Chambers of Commerce, Community Action
Agencies, Economic Development Agencies,
Business entities, Mental Health Agencies, Faith-
Based Organizations, Refugee and Immigrant
Services, DOL grantees, Employment Agencies)

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:

Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

Name:
Address:
Phone:
E-mail:
Local Contact Person:

II. Local One-Stop System Sites: The following sites are the locations for delivery of service for the above identified Area 7 local regional One-Stop System:

Level 2 (Full-Service Comprehensive Services Designated Site)

Name:

Address:

Level 1 (Services provided by 3 or more programs with a fully functional Resource Room)

Name:

Address:

Level 1 (Services provided by 3 or more programs with a fully functional Resource Room)

Name:

Address:

Level 1 (Services provided by 3 or more programs with a fully functional Resource Room)

Name:

Address:

Level 1 (Services provided by 3 or more programs with a fully functional Resource Room)

Name:

Address:

Access Point: (Services and/or partner information available via the Internet and brochures and/or other outreach)

Name:

Address:

Access Point: (Services and/or partner information available via the Internet and brochures and/or other outreach)

Name:

Address:

Access Point: (Services and/or partner information available via the Internet and brochures and/or other outreach)

Name:

Address:

Electronic Access: (Information regarding the One-Stop System and/or services available via electronic access)

Website Address:

Unemployment Insurance Claims:

Other:

III. Local One-Stop System Policies and Procedures

(Local system policies and procedures outlined here)

IV. Local One-Stop System Signature Page: The signatures of the partners below denote their respective program participation in the MOU process for the Area 7 local regional One-Stop System noted above. By signing below, all local partners have reviewed the relevant Worksheets A and B and the policies and procedures for their local system and find it accurately reflects a general understanding of their involvement in the local One-Stop System. The partners understand the aforementioned information will be compiled into one master Area 7 MOU which may require further signatures from the participating agencies.

(Note: Local Regional One-Stop Systems may have more or less common signature lines for common partners. Also, some partners listed below may not provide services in the local area.)

Chief Local Elected Officials:

Chair, (local area) Workforce Policy Board Date

Chair, (local area) Board of County Commissioners Date

Chair, (local area) Workforce Policy Board Date

Local One-Stop Operator

Chair, (local area) Board of County Commissioners Date

Name, representative agency Date

Chair, (local area) Board of County Commissioners Date

WIA Title I Programs
(Adult, Dislocated, Youth)

Chair, (local area) Board of County Commissioners Date

Name, representative agency Date

Chair, (local area) Board of County Commissioners Date

Name, representative agency Date

(where applicable)

Regional Council of Governments

Name, representative agency Date

Chair, (local area) Regional Council of Governments Date

Name, representative agency Date

Local Workforce Policy Board(s)

Chair, (local area) Workforce Policy Board Date

Name, representative agency Date

WIA Title II Program(s)
(Adult Education and Family Literacy)

Chair, (local area) Workforce Policy Board Date

Name, representative agency Date

Chair, (local area) Workforce Policy Board Date

Name, representative agency Date

WIA Title III Programs
(Wagner-Peyser, TAA, UI, Reemployment Services, Veterans E&T)

Name, Ohio Department of Job & Family Services Date

WIA Title IV Program
(Vocational Rehabilitation Services)

Name, Ohio Rehabilitation Services Commission Date

Older Americans Act Title V
(Senior Community Employment Services)

Name, representative agency Date

Name, representative agency Date

Carl Perkins Vocational & Applied Technology Education Act
(Post Secondary Voc Ed)

Name, representative agency Date

Name, representative agency Date

Name, representative agency Date

TANF
(Ohio Works First, Prevention/Retention/Contingency Programs)

Name, (local) County Dept. of Job & Family Services Date

Name, (local) County Dept. of Job & Family Services Date

Name, (local) County Dept. of Job & Family Services Date

Community Services Block Grant (CSBG)
(Employment and Training Programs)

Name, representative agency Date

Housing & Urban Development (HUD)
(Employment and Training Programs)

Name, representative agency Date

Welfare-to-Work Programs
(Social Security Act Section 403(a)(5))

Name, representative agency Date

Other WIA Title I Programs
(Job Corps, Native American Program, Migrant/Seasonal Farm Worker, Veteran's Workforce, National Emergency Grant, Demonstration Pilot Programs)

Name, representative agency Date

Name, representative agency Date

Name, representative agency Date

Name, representative agency Date

Non-Required One-Stop System Partners

Name, representative agency Date

Name, representative agency Date

Name, representative agency Date

Workforce Investment Area #7 Worksheet A - Partner Service Responsibilities Matrix

Guidance
(revised 11/17/03)

The intent of this worksheet with its accompanying attachments is to provide a detailed overview of all partner responsibilities and services offered in the regional one-stop systems of Area 7. Designed in an at-a-glance format, it provides quick access and readability for partner and local area WIB use. The worksheet, when modified in each local regional area, will identify the core, intensive and training services specific to the local regional area one-stop system. An accompanying outline for Area 7 use is also provided as Attachment A-1: Partner Services Responsibilities Detail. In this section, the Area 7 local regional One-Stop System will provide a narrative detailing and reflecting the local approach to the basic set of services provided throughout the entire Area 7 workforce investment area. This narrative will define and be inclusive of all the required core services in addition to the intensive and training services provided in a specific local regional area.

The process for ensuring partner involvement in defining and agreeing on partner service responsibilities, methods of referral and work flows can be facilitated by the following:

- **Define Services:** Initial discussions should begin with defining the specific duties/responsibilities associated with the required Core Services and the options for Intensive and Training Services. (*Note: Core Services are required through the Workforce Investment Act, whereas the types of Intensive and Training Services are defined as “may include” and therefore offer local flexibility*). This should be done with a systematic approach, as opposed to a single site approach, to ensure the services all system locations offer are in conjunction with each other and provide the One-Stop customers in a local regional area with a common service approach.
 - The local area must identify those specific services that will be offered in the one-stop to meet the needs of their area based on the five-year local plan, labor market information and demographics.
 - An example of the level of discussion that should occur would be defining exactly what the Core Service of “Initial Assessment of Skill Levels” entails. Assessment has many different meanings among the partners and this should be clearly defined and able to meet the needs of the partners.
 - Remember to include business and youth services in this discussion.
 - These services and the detailed description (the what, how and when) should be agreed upon by all partners prior to discussing whose responsibility it will be.

This step can also be used as a learning process for partners not familiar with other partner services that can be beneficial to their respective program goals and objectives. In Area 7, a matrix of services and outline for a narrative detailing services is provided below.

• **Chart Customer Work Flow:** In conjunction with the above discussion on defining the services to be provided, Area 7 local regional One-Stop Systems will chart out the customer work flow as the discussion evolves. This provides a visual of how and when certain services will be addressed and will enhance the discussion. This also begins to clearly define the points where referrals will occur and the discussion on methods of referrals. By charting out the customer flow and points of referral, it puts into practice the philosophical approach of the local area one-stop. There will be two customer flows, one for the job seeker and one for the business customer.

Assign Partner Responsibilities: Only after these discussions have occurred should the partners then begin to discuss individual and/or shared partner service responsibilities. Each partner should be prepared to discuss openly the options, opportunities and program availability for their respective agencies. This step will include negotiation and debate on how to provide the optimal services to the customers and which partner(s) should be involved. Duplication of services and how to address it will be a point of discussion in this step. It is important to maintain the “shared services” approach and identify how all partners will participate in this (i.e., through staff commitment to common services). See following matrix and detail outline for illustrating local regional One-Stop System services and partner responsibilities.

Ensure the partner meetings use a good scribe to capture all necessary information accurately and thoroughly.

Abbreviated terms and acronyms are used in the worksheet. In addition, a sample legend is provided at the bottom of the worksheet. These abbreviations and acronyms are defined as follows:

| | | |
|--|---------------|---|
| ODJFS = Ohio Department of Job and Family Services | WDA | = Workforce Development Agency |
| CDJFS = County Department of Job and Family Services | PRC | = Prevention, Retention and Contingency |
| ORSC = Ohio Rehabilitation Services Commission | ODA | = Ohio Department of Aging |
| CAO = Community Action Agency | CMHA | = Community Metropolitan Housing Authority |
| UC = Unemployment Compensation | TAA | = Trade Adjustment Assistance |
| NAFTA = North American Free Trade Agreement | Vets E & T | = Veterans Employment and Training |
| WIA = Workforce Investment Act | OWF | = Ohio Works First |
| CSBG = Community Services Block Grant | HUD E & T | = Housing & Urban Development Employment & Training |
| SS/WTW = Social Security/Welfare-to-Work | Job Corps/CCC | = Civilian Conservation Corps |
| TANF = Temporary Assistance for Needy Families | OAA | = Older Americans Act |
| ODNR = Ohio Department of Natural Resources | DOL | = US Department of Labor |
| WP = Wagner-Peyser Act | | |

Title I = Workforce Investment Act (WIA) funds serving adults, dislocated workers, youth, Job Corps, Native American programs, migrant and seasonal farm worker programs and veterans workforce programs

Title II = WIA funds addressing adult education and literacy (ABLE)

Title III = WIA funds addressing Wagner-Peyser funded programs and linkages with the Trade Act, Veterans Employment Programs and the Older Americans Act

Title IV = WIA funds containing the Rehabilitation Act of 1998

Title V = of the Older Americans Act addressing senior employment activities

Carl Perkins = Post secondary vocational education activities under the Carl D. Perkins Vocational and Applied Technology Education Act

CSBGA = Community Services Block Grant Act funding for the reduction of poverty and revitalization of low income communities (grants administered through the Ohio Department of Development)

SSA = Social Security Administration (Act) - in reference to the WTW grants under Section 403(a)(5)

NOTE: Sample work flows and service detail narratives are available through the www.ohioworkforce.org website through previously completed

local area MOUs posted on the site.

Workforce Investment Area # 7
Regional One-Stop System # _____
Worksheet A: Matrix of Partner Service Responsibilities

| Partner | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc. Ed. Entity | ORSC | Older Amer. | CSBG Entity | CMHA | Grantee | Grantee | Other |
|---|--|--------------------|-------|--------------------|-----------------------|------------|-------------|-------------|---------|---------------|---------|-------|
| Partner Program(s) | WP, UC, TAA, NAFTA, ReEmployment Serv., Veterans Prog. | WIA (Adult, Youth) | OWF | Adult Ed/ Literacy | Post-Secondary Voc Ed | Rehab Svcs | OAA | CSBG | HUD E&T | Job Corp /CCC | SS/ WTW | |
| Program Funding Source | Title I & III | Title I | TANF | Title II | Perkins Act | Title IV | Title V | CSBGA | HUD | DNR | SSA | |
| Staff at One-Stop (Level 2) <i>(insert location)</i> | | | | | | | | | | | | |
| Staff at One-Stop (Level 1) <i>(insert location)</i> | | | | | | | | | | | | |
| Staff at One-Stop (Level 1) <i>(insert location)</i> | | | | | | | | | | | | |
| Services outlined in bold offered at the Level 1 site located at: Services that are shaded offered at the Level 1 site located at: | | | | | | | | | | | | |
| Core Services | | | | | | | | | | | | |
| Eligibility for WIA funding sources | | | | | | | | | | | | |
| Outreach, intake & orientation | | | | | | | | | | | | |
| Initial assessment of skill levels | | | | | | | | | | | | |
| Job search and placement assistance | | | | | | | | | | | | |
| Labor Market Info and job vacancies | | | | | | | | | | | | |
| Performance and cost info on ETP | | | | | | | | | | | | |
| Local Perform. Measures information | | | | | | | | | | | | |
| Availability of support services | | | | | | | | | | | | |
| Info regarding filing UC claims | | | | | | | | | | | | |
| Info on one-stop partner services | | | | | | | | | | | | |
| Estab. elig. WTW & non-WIA E&T | | | | | | | | | | | | |
| Follow-up services | | | | | | | | | | | | |

| Partner | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc. Ed. Entity | ORSC | Older Amer. | CSBG Entity | CMHA | Grantee | Grantee | Other |
|---------------------------|--|--------------------|-------|--------------------|-----------------------|------------|-------------|-------------|---------|---------------|---------|-------|
| Partner Program(s) | WP, UC, TAA, NAFTA, ReEmployment Serv., Veterans Prog. | WIA (Adult, Youth) | OWF | Adult Ed/ Literacy | Post-Secondary Voc Ed | Rehab Svcs | OAA | CSBG | HUD E&T | Job Corp /CCC | SS/ WTW | |
| Business related services | | | | | | | | | | | | |
| Youth Services | | | | | | | | | | | | |

Intensive Services

| | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|
| Comp. and specialized assessment | | | | | | | | | | | | |
| Development of Indiv. Emplmnt Plan | | | | | | | | | | | | |
| Group counseling | | | | | | | | | | | | |
| Indiv. counseling & career planning | | | | | | | | | | | | |
| Short-term, prevocntl serv. (life skills) | | | | | | | | | | | | |
| Other locally defined intensive services | | | | | | | | | | | | |

Training Services

| | | | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|--|--|
| Occupational skills training | | | | | | | | | | | | |
| On-the-job training | | | | | | | | | | | | |
| Workplace & cooperative education | | | | | | | | | | | | |
| Private sector training | | | | | | | | | | | | |
| Skills upgrading and retraining | | | | | | | | | | | | |
| Entrepreneurial training | | | | | | | | | | | | |
| Non-traditional training | | | | | | | | | | | | |
| Job readiness training | | | | | | | | | | | | |
| Adult education and literacy programs | | | | | | | | | | | | |
| Customized training | | | | | | | | | | | | |
| Incumbent worker training | | | | | | | | | | | | |
| Other locally defined training services | | | | | | | | | | | | |

Legend:

(FT) = On-Site Staff Full Time
(P) = Posting at One-Stop Office
(C) = Contracted Service On-Site Full-Time

(PT) = On-Site Staff Part Time
(T) = Access via Telephone
(C/PT) = Contracted Service On-Site Part-Time

(B) = Brochure/Handout
(A) = Access via Automated System
(C/Off) = Contracted Service Off-Site

(O) = Other

The following attachments are included with Worksheet A:

Attachment A-1: Partner Services Responsibilities - Detail (*Area 7 Outline*)

Attachment A-2: (*Area 7 Regional One-Stop System*) Customer Work Flows - Job Seeker and Business (includes description of methods of referral)

Attachment A-3: (*Area 7 Regional One-Stop System*) Common Intake/Referral Form(s)

(*Following is a sample of how the worksheet may be used in an area.*)

Workforce Investment Area # 7

Regional One-Stop System # _____

Worksheet A: Matrix of Partner Service Responsibilities

| Partner | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc. Ed. Entity | ORSC | Older Amer. | CSBG Entity | CMHA | Grantee | Grantee | Other |
|--|--|--------------------------|-------|-----------------------|--------------------------|---------------|----------------|----------------|------------|------------------|------------|-------|
| Partner Program(s) | WP, UC, TAA, NAFTA, ReEmployment Serv., Veterans Prog. | WIA (Adult, Youth) | OWF | Adult Ed/ Literacy | Post-Secondary Voc Ed | Rehab Srvc | OAA | CSBG | HUD E&T | Job Corp /CCC | SS/ WTW | |
| Program Funding Source | Title I & III | Title I | TANF | Title II | Perkins Act | Title IV | Title V | CSBG | HUD | DNR | SSA | |
| Staff at One-Stop (Level 2) (insert location) | WP- 2FT Vets - 1PT | 3FT | 3FT | 3PT | .5PT | 1PT | 1FT | 1FT | .5PT | .5PT | | |
| Staff at One-Stop (Level 1) (insert location) | WP - 1FT | 2FT | 1FT | | | 1FT | | | | | | |
| Staff at One-Stop (Level 1) (insert location) | | 1FT | 1FT | | .5PT | | .5PT | | | | | |

Services outlined in bold offered at the Level 1 site located at:

Services that are shaded offered at the Level 1 site located at:

Core Services

| | | | | | | | | | | | | |
|-------------------------------------|-----|-----|--|------|-----|----|---|----|----|---|---|--|
| Eligibility for WIA funding sources | | | | | | | | | | | | |
| Outreach, intake & orientation | - | PT2 | | C/PT | C/O | PT | - | PT | B | B | B | |
| Initial assessment of skill levels | - | PT2 | | C/PT | C/O | PT | | | | | | |
| Job search and placement assistance | - | PT2 | | C/PT | C/O | PT | | | | | | |
| Labor Market Info and job vacancies | A | A | | | | | | | | | | |
| Performance and cost info on ETP | A/P | A/P | | | | | | | | | | |
| Local Perform. Measures information | - | | | | | PT | - | | | | | |
| Availability of support services | - | PT2 | | C/PT | C/O | PT | - | PT | PT | B | B | |
| Info regarding filing UC claims | B/T | | | | | | | | | | | |

| Partner | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc. Ed. Entity | ORSC | Older Amer. | CSBG Entity | CMHA | Grantee | Grantee | Other |
|---|---|--------------------|-------|--------------------|---------------------|------------|-------------|-------------|---------|---------------|---------|-------|
| Partner Program(s) | WP UC, TAA, NAFTA, ReEmployment Serv., Veterans Prog. | WIA (Adult, Youth) | OWF | Adult Ed/ Literacy | Post-Secndry Voc Ed | Rehab Svcs | OAA | CSBG | HUD E&T | Job Corp /CCC | SS/ WTW | |
| Info on one-stop partner services | PT2 | — | — | C/PT | C/O | PT | — | PT | | | | |
| Estab. elig. WTW & non-WIA E&T | | | | | | | | | | PT | PT | |
| Follow-up services | PT2 | — | — | C/PT | C/O | PT | — | | | | | |
| Business related services | — | — | | | | PT | | | | | | |
| Youth Services | — | | | | | | | | | | | |
| Intensive Services | | | | | | | | | | | | |
| Comp. and specialized assessment | PT | — | — | C/PT | PT | PT | | | | | | |
| Development of Indiv. Emplmnt Plan | PT | — | — | | | PT | | | | | | |
| Group counseling | — | — | | | | PT | | | | | | |
| Indiv. counseling & career planning | PT | — | — | | | PT | | | | | | |
| Short-term, prevocctl serv. (life skills) | | — | — | | | | | | | | | |
| Other locally defined intensive services | | | | | | | | | | | | |
| Training Services | | | | | | | | | | | | |
| Occupational skills training | | | | | C/O | C/O | | | | | | |
| On-the-job training | | O | O | | O | O | | | | | | |
| Workplace & cooperative education | | C/O | | C/PT | | | | | | | | |
| Private sector training | | O | O | | O | O | | | | | | |
| Skills upgrading and retraining | | C/O | | C/PT | | | | | | | | |
| Entrepreneurial training | | | | | | | | C/O | | | | |
| Non-traditional training | | C/O | C/O | | C/O | | | | | | | |
| Job readiness training | | — | — | | C/O | | | | | | | |
| Adult education and literacy programs | | | | C/PT | C/O | | | | | | | |
| Customized training | | O | C/O | | C/O | | | | | | | |

| Partner | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc. Ed. Entity | ORSC | Older Amer. | CSBG Entity | CMHA | Grantee | Grantee | Other |
|---|--|--------------------------|-------|-----------------------|--------------------------|---------------|----------------|----------------|------------|------------------|------------|-------|
| Partner Program(s) | WP, UC, TAA, NAFTA, ReEmployment Serv., Veterans Prog. | WIA (Adult, Youth) | OWF | Adult Ed/ Literacy | Post-Secondary Voc Ed | Rehab Srvc | OAA | CSBG | HUD E&T | Job Corp /CCC | SS/ WTW | |
| Incumbent worker training | | O | | | | | | | | | | |
| Other locally defined training services | | | | | | | | | | | | |

Legend:

= On-Site Staff Full Time

= Posting at One-Stop Office

= Contracted Service On-Site Full-Time

= Other

The following attachments are included with Worksheet A:

Attachment A-1: Partner Services Responsibilities - Detail (*Area 7 Outline*)

Attachment A-2: (*Area 7 Regional One-Stop System*) Customer Work Flows - Job Seeker and Business (includes description of methods of referral)

Attachment A-3: (*Area 7 Regional One-Stop System*) Common Intake/Referral Form(s)

(PT) = On-Site Staff Part Time

(T) = Access via Telephone

(C/PT) = Contracted Service On-Site Part-Time

(B) = Brochure/Handout

(A) = Access via Automated System

(C/Off) = Contracted Service Off-Site

Workforce Investment Area #7
Regional One-Stop System # _____
Attachment A-1: Partner Services Responsibilities - Detail

Area 7 local regional systems must describe in the following outline format how the basic set of Area 7 services are being provided and performed in their respective region. The narrative detail should include the “what”, “how” and “when” of the services and must include all required and optional services as noted in the Worksheet A matrix for the regional system. Service integration and non-duplication of partner services should be evidenced in the detail narrative. (Sample language is included at the end of the outline for illustrative purposes).

Resource Room

(describe the availability of self and staff assisted services in the resource room)

Job Seeker Services

(describe services that will be provided to the individual job seeker and how, if needed, those services will be managed among the partners)

Business Related Services

(describe the services that will be provided to the business community, include off-site services, and how they will be managed among the partners)

Support Services

(describe those services that are not required core and/or intensive services made available to customers and any follow-up that will be provided)

Youth Services

(describe the services that show how the needs of youth are being met through the local One-Stop System)

Workshops

(describe the types of workshops that will be provided through the local One-Stop System and the availability to the universal, program eligible, and business customers)

Training Services

(describe the local area approach to training services and how these will be provided to individuals and businesses and managed among the partners)

Miscellaneous/Other Services

(describe any additional locally focused services relevant to the region (i.e., unique services that may reflect the area labor market or highlight a specific service such as financial aid assistance)

The following are samples for illustrative purposes:

Job Seeker Services

These services will be available to the universal population at the system sites.

- Eligibility for WIA funding services: provide and accept applications based upon information from the local area common intake form; review for core, intensive and training services eligibility; referrals to other partner agencies as defined in work flow; maintain records in automated system
- Outreach, intake and orientation: follow local area plan for outreach activities to include participation in job fairs and local presentations; have a daily or weekly orientation contingent upon need; use the common intake form developed by the local area; provide intake services for those eligible for partner program; have program information available in a handout or brochure
- Initial assessment of skill levels: use of the local area standard assessment sheet as needed; referrals to appropriate partner as defined in work flow; maintenance of record keeping with one-stop operator
- Follow-up services: correspondence and/or telephone call follow-up to individuals within thirty (30) days of visiting the one-stop to ensure needs have been addressed; provision of additional information (program brochures, referral to another partner) to individuals involved in follow-up activities; follow up and job retention activities in accordance with each partner program; maintenance of follow-up activities on automated system

Subsequent services will be provided based on the initial assessment of skill levels and determined need.

- Comprehensive and specialized assessments: use of the following assessments pertinent to the partner program to be made available on a weekly basis: reading and math assessment, WorkKeys, COPESS, CAPS, TABE; profiling sessions; maintenance of test results in automated system
- Group counseling: the following group counseling activities will occur on a monthly basis and will meet twice weekly for 4 hours and during each four week period: Job Preparation Skills; Interviewing for Success; Bustlers
- Short-term prevocational services: the following services will be made available bi-monthly and will consist of 20 hours of activity: How to Use the Web; Budgeting with Your New Job; Resume Writing; How to Nail Down that Job - interviewing techniques

Training Services

These services will be provided to those individuals who have completed core and intensive services and require further training based upon further assessment. Eligibility for these services will be contingent upon available funding and are prioritized according to area workforce needs. Individual Training Account (ITA) vouchers, amount and type as defined in the local plan, will be provided to individuals for these services. Partners providing these services are responsible for maintenance of progress records in accordance with the local plan (i.e., attendance, grade level attainment) and must report on a monthly basis to the one-stop operator. Participation in review of local area needs will be conducted every three years.

- Occupational skills training: based upon local area need, the following occupational skills training programs will be available through the ITA voucher: Commercial Truck Driving (3 month course); Nursing (2 year program); Tool and Die Machining (18 month program)
- On-the-job training: targeted to support service skills (i.e., secretarial, customer service, janitorial) that lead to a job upon completion of the training period. Partner responsibilities include identification and recruitment of potential employers; administration and management of program; follow-up and retention services; coordination with one-stop operator and work flow on referrals; maintenance of records.

Sample

Workforce Investment Area #7
Regional One-Stop System # _____
Attachment A-2: Customer Work Flows

This attachment will include both the Job Seeker and Business Customer Work Flows for the regional One-Stop System. Areas in the flows where referral decisions are made should be highlighted. These flows are referenced in Section IV(A)(3)(a) of the template. Samples are available at www.ohioworkforce.org under the One-Stop System/MOU section. A short narrative reflecting methods and processes for referrals is also included in this attachment.

Workforce Investment Area #7
Regional One-Stop System # _____
Attachment A-3: Common Intake/Referral Form(s)

The common forms used in the regional system will be attached here. These may be formatted as one inclusive form or as separate forms. These forms are referenced in Section IV(A)(3)(b) of the template. Samples are available at www.ohioworkforce.org under the One-Stop System/MOU section.

Workforce Investment Area #7

Worksheet B: Resource/Cost Sharing Agreement

Guidance

(revised 11/17/03)

Purpose: The intent of this worksheet is to provide a detailed overview of all partner shares for operational costs in the Area 7 Ohio Option One-Stop Regional System. This guidance provides a four step process for each regional system to use to facilitate partner involvement in decision making regarding the operational expenses of the physical one-stop site(s) and overall system. The worksheet, when supplied with information from each local regional One-Stop System area, will identify the specific financial considerations and commitments of each partner. Each local regional system's information from the worksheet will be rolled up into one overall spreadsheet for all of Area 7. This worksheet is the template that each local regional area will use as guidance in detailing and recording each partner commitment to the operational costs of each regional One-Stop System. The basis of this worksheet is to define the specific cost pools and related expenses in a uniform format, with the understanding that the cost pools and related expenses may not be applicable in every regional One-Stop System. (For purposes of maintaining a consistent format, those expenses that are not relevant in a regional One-Stop System must still be reflected in the overall agreement shown with a zero value.)

Background: Prior to beginning the partner discussion on resource/cost sharing it is important to identify a couple of key concepts so all partners understand their responsibility on sharing the operational costs of the One-Stop System. Resource/cost sharing should be viewed as two distinctly different concepts when determining partner commitments.

Resource Sharing: The first concept, resource sharing, is a fully integrated approach where all partners share in the responsibility of providing services to prevent non-duplication and create a seamless delivery system. This is defined as "shared services" where each partner contributes, through programmatic services, to some aspect of the overall One-Stop System for the good of all customers and partners. Through this participation each partner may benefit from the services another partner provides. This participation is captured in the "Shared Services" pool in this worksheet with a value of "time" (generally reflected in hours or as FTE) allocated to each benefiting partner. In Worksheet A - Partner Service Responsibilities, the partners identified the programmatic services to be delivered and how and when they would be delivered. This worksheet then captures the time commitment of each partner toward those services. For purposes of this agreement, there is not a "dollar" value associated with the provision of program services through direct delivery staff, only the "time" value. (It is an individual partner decision how their specific program costs are determined for the delivery of their program services within a One-Stop system.)

Cost Sharing: The second concept, cost sharing, focuses on the shared operational expenses of the One-Stop System and these shared costs are identified in "dollar" amounts. This includes both system-wide costs such as outreach, and individual physical site costs such as a lease. These costs are reflected in the specified cost pools noted below. The partners will decide on those expenses that benefit and are relevant to each of the partner programs and each partner will initially be assessed a "dollar" value responsibility. (This "dollar" value responsibility becomes a funding commitment for the partner and may be in the form of cash or in the provision of goods or services consistent with the agreed upon budget).

Thus partners will be responsible for a resource sharing ("time") commitment (reflected in hours or as FTE) as well as a cost sharing commitment (reflected as a funding amount in the form of cash or goods or services).

Four Step Process: The four step process for completing this worksheet with partner involvement is outlined below with examples following.

- Step One: Identification of Shared Costs with Cost Benefit Narrative
- Step Two: Determination of Methodology(ies) for Allocation of Costs
- Step Three: Application of Methodology(ies) to Cost Pools
- Step Four: Partner Commitments

Four Step Process with Accompanying Area 7 Sample Templates

Step One:

The One-Stop Operator(s) in a regional One-Stop System should prepare a budget of all expenses related to the One-Stop System operation. Expense items should reflect actual cost when possible and any invoices, lease agreements, etc. should be made available to any partner as documentation for discussion and invoicing purposes. Estimated costs may be used in preparation of the budget and for informational use for partners to encumber funds, but only actual expenses may be invoiced for reimbursement. A narrative detailing the cost benefit information for partner programs must be included. The budget should be formatted in cost pools. Area 7 will use a common set of standard cost pools in identifying the budget and benefit description for each shared item. This is illustrated in the example below.

Workforce Investment Area #7 Regional One-Stop System # _____ Worksheet B: Resource/Cost Sharing Agreement

II

Identification of Shared Costs: The following costs have been agreed upon by the local partners as shared cost items associated with the operation of the One-Stop System. A description of the cost item and benefit derived is illustrated as follows:

(Note: Line Item Cost Benefit language below is for illustrative purposes - local areas must define)

| One-Stop System Operating Cost Pools | Line Item (Including Cost Benefit) | Site | Annual Cost |
|---|--|-----------|-------------|
| Facilities Pool | Lease - Cost of the physical space used for partner services, resource rooms, conference rooms, interview rooms, common areas, and training labs. Lease includes snow removal, refuse pickup and landscaping services. Level 2 located at _____ includes _____ square feet Level 1 located at _____ includes _____ square feet Level 1 located at _____ includes _____ square feet | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| | Utilities - Cost of gas, electric, water | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| | Maintenance (Janitorial) - Cost of cleaning crew and cleaning supplies | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |

| | | | |
|---------------------------------|---|-------------------------------|----------------|
| One-Stop Management Pool | Maintenance (Repairs, etc.) - Cost of minor building repairs, maintenance of equipment (air conditioning, heating systems), upkeep (painting, carpeting, flooring) | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Other - | | \$ |
| | Totals - Facilities Pool | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Total | \$ |
| | One-Stop Operator/Manager - Salary for 1 FTE to manage the activities of the One-Stop System. These duties include: oversight of integration of program services, scheduling of services and activities, daily management of operations, conducting One-Stop partner meetings, production of performance reports with analysis, etc..... | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Receptionist/Greeter - Salary for 1 FTE receptionist available to assist the partners with phone coverage, mail needs, light typing, some scheduling, ordering of supplies, inventory, etc..... | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Data Entry/Support Staff - Salary for 2 FTE support staff to enter common customer information into the state automated system for all partner access, maintains records for Common Referral Form tracking, assists partners in retrieving information on customers, maintains a central file of customer products (work plans, resumes, applications), etc..... | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Fiscal Support Staff - Salary for .3 FTE fiscal staff for accounting services that include invoicing, accounts payable/receivable, maintenance of fiscal documentation for audit purposes, preparation of spreadsheets for analysis; quarterly reconciliations of cost sharing expenses, etc..... | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Technology Support Staff - Salary for .25 FTE IT staff for maintenance or resource room hardware and software, web site maintenance and design, creation of one-stop production reports and materials, etc..... | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Other - | | \$ |
| | Totals - One-Stop Management Pool | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | | |
| | | | |
| | | | |

| Resource Room Pool | | Total | \$ |
|--|-----------|-------|----|
| | | | |
| Computer Equipment (Hardware) - Level 2 - 12 cubicles equipped with Dell AS2000 Systems (includes monitors, hard drives, keyboards, mouses, ergonomic chair and related attachments) Level 1 (site) - 8 cubicles similarly equipped Level 1 (site) - 8 cubicles similarly equipped - for customer use in: internet searches of job postings, word processing for creating employment seeking documents, researching labor market information, communicating via e-mail to prospective employers, researching training program opportunities, on-line applications to educational institutions or prospective employers, etc..... (- may include costs for training lab computer equipment) | Level 2 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | All sites | | \$ |
| Computer Equipment (Software) - Tutorials for Resume Writing, Word Products, OCSIS, etc. available at all sites for customer use in job search and/or training activities, etc..... | Sub-total | | \$ |
| | Level 2 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| Copier and Copier Maintenance - Cost of 3 Toshiba 4500 Copiers and maintenance contracts, one for each site, for customer use in duplicating documents | Level 2 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | Level 2 | | \$ |
| Fax and Fax Maintenance - Cost of 3 Lexmark Model FA1200 fax machines and maintenance contracts, one for each site, for customer use in transmittal of documents | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | Level 2 | | \$ |
| Telephone System - Cost of maintaining telephone lines in the Resource Room for customer use and fax machines. Includes the cost of Meridian Model NT437 phones and related equipment. Level 2 - 6 lines, 4 phones Level 1 (site) 3 lines, 2 phones Level 1 (site) 3 lines, 2 phones | Level 2 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | Level 2 | | \$ |
| Internet Access - Cost of maintaining internet access to all computers in the Resource Room for customer use. This is accomplished in each site via (internet provider, T-1 line, etc.) | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | Level 2 | | \$ |
| Furniture - Cost for customer use furniture that includes 8 ft. tables and chairs, brochure stands, bulletin boards for job postings, waiting area furniture, etc..... (- may include training lab and/or conference room and/or interview room furniture) | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Level 1 | | \$ |
| | Sub-total | | \$ |
| | Level 2 | | \$ |

| | | | |
|--|--|-----------|----|
| Equipment and Supplies Pool (Partner Use) | Audio-Visual Equipment - Cost of television and VCR/DVD player in orientation room, Litebox Model 3000 projector in training lab, mobile whiteboards, overhead projector, etc. for use in providing services to customers such as orientations, workshops, trainings, relaying information for partner supportive services, etc..... | Sub-total | \$ |
| | | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | Supplies - Miscellaneous supplies related to customer use such as paper, pens, envelopes, paper clips, staplers, etc. | Sub-total | \$ |
| | | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | Other - Some examples may be ADA equipment, newspaper and professional journal subscriptions, training manuals, postage for customer use, etc..... | Sub-total | \$ |
| | | | \$ |
| | | | |
| | | | |
| | Totals - Resource Room Pool | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Total | \$ |
| Equipment and Supplies Pool (Partner Use) | Telephone System - Cost of installing and maintaining telephone lines for partner use and fax machines. Includes the cost of Meridian Model NT437 phones and related equipment. Includes local area telephone costs and long distance usage costs. Level 2 - 24 lines, 20 phones Level 1 (site) 6 lines, 4 phones Level 1 (site) 6 lines, 4 phones | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| | Copier and Copier Maintenance - Cost of 3 Toshiba 4500 Copiers and maintenance contracts, one for each site, for partner use in duplicating documents | Level 2 | \$ |
| | | Level 1 | |
| | | Level 1 | |
| | | Sub-total | \$ |
| | Fax and Fax Maintenance - Cost of 3 Lexmark Model FA1200 fax machines and maintenance contracts, one for each site, for customer use in transmittal of documents | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| | Postage - Cost for Pinckney postage meter machine and related postage costs of partner mailings and One-Stop System mailings | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| | | Level 2 | \$ |

| | | | |
|--------------------------------|---|-------------------------------|----------------|
| Outreach/Marketing Pool | Furniture - Cost for partner use furniture, may include office space furniture, cubicles, etc..... | Level 1 Level 1 | \$ \$ |
| | | Sub-total | \$ |
| | Supplies - Miscellaneous supplies related to customer use such as paper, pens, envelopes, paper clips, staplers, etc. | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Common Tracking System Software - Cost for local software for tracking board mandated performance measures, case management of referral customers, etc.....Accessible at all system sites. | All sites | \$ |
| | | Sub-total | \$ |
| | Computer Equipment (Hardware) - Level 2 - 12 cubicles equipped with Dell AS2000 Systems (includes monitors, hard drives, keyboards, mouses, ergonomic chair and related attachments) Level 1 (site) - 8 cubicles similarly equipped Level 1 (site) - 8 cubicles similarly equipped - for partner use in delivery of program services and for internet access | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | Other - | | \$ |
| | Totals - Equipment and Supplies Pool (Partner Use) | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Total | \$ |
| | Brochures and Printed Materials - Cost of developing and producing One-Stop System informational brochures, business cards, flyers, resources pamphlet, etc..... | System-wide | \$ |
| | | Sub-total | \$ |
| | Billboard Advertising - Cost of public service announcement billboards advertising services of the One-Stop System, a total of 5 billboard rentals strategically placed in targeted services areas. Each billboard monthly cost = \$ | System-wide | \$ |
| | | Sub-total | \$ |
| | Media Advertising - Cost for public service announcements (PSAs) on local television, radio and newspaper outlets. Costs include twelve PSAs, one a month targeting different services of the One-Stop System Cost per PSA = \$ | System-wide | \$ |
| | | Sub-total | \$ |
| | Orientation Materials - Cost for production of One-Stop System orientation materials which include a repeating loop VCR | | |

| | | | |
|------------------------------|---|-------------------------------|----------------|
| | tape describing services, self assisted exploration software via local website, etc..... | System-wide | \$ |
| | | Sub-total | \$ |
| | Signage - Cost for interior and exterior signs for the physical One-Stop System sites. | System-wide | \$ |
| | | Sub-total | \$ |
| | Other - | System-wide | \$ |
| | | Sub-total | \$ |
| | Totals -Outreach/Marketing Pool | System-wide | \$ |
| | | Total | \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| Miscellaneous Pool | Other - | System-wide | \$ |
| | | Sub-total | \$ |
| | Other - | System-wide | \$ |
| | | Sub-total | \$ |
| | Other - | System-wide | \$ |
| | | Sub-total | \$ |
| | Totals -Miscellaneous Pool | System-wide | \$ |
| | | Total | \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| Summary of Cost Pools | Facilities Pool | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | One-Stop Management Pool | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | Resource Room Pool | Sub-total | \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |
| | | Sub-total | \$ |
| | | Level 2 Level 1 Level 1 | \$ \$ \$ |

| | | | |
|---|--|-------------|----|
| | | Sub-total | \$ |
| Equipment and Supplies Pool (Partner Use) | | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | Sub-total | \$ |
| Outreach/Marketing Pool | | System-wide | \$ |
| | | Sub-total | \$ |
| | | | |
| Miscellaneous Pool | | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | System-wide | \$ |
| | | Sub-total | \$ |
| Totals -All Pools | | Level 2 | \$ |
| | | Level 1 | \$ |
| | | Level 1 | \$ |
| | | System-wide | \$ |
| | | Total | \$ |
| | | | |

Step Two: After all expense items are agreed upon as shared costs, each partners' share of the operating expense items will need to be calculated. A key component of calculating each partner's share of operational expenses is deciding upon a fair share methodology or percentage. It is important to keep in mind the methodology used for calculating a fair share for the partners is able to support a partner's level of participation in services and costs in terms of benefits received for the partner's program. Each local area must decide upon the methodology or combination of methodologies that they will use, but the methodology must be supported by data and applied consistently over time. In addition, the same methodology must be applied across an entire pool. For example, if an Occupancy Methodology is being applied to the Facilities Pool, this methodology must be used across all sites within the pool. Also, partners may decide to establish a minimal standard for the application of a fair share methodology. An example of such could be the minimal square footage per partner may be 50 square feet and applied to the appropriate cost pool. For purposes of this guidance, three common methodologies are illustrated below, however local areas will provide the appropriate information for their respective methodologies.

II. Allocation Methodology: The One-Stop System partners have agreed upon the following three methodologies for determining proportionate shares for shared cost items.

A. Position Usage: Based on partners' Full-Time Equivalent (FTE) staff stationed at the One-Stop. Partners with Part-Time staff stationed at the One-Stop are calculated based on Full-Time Equivalency. Illustrated as follows:

| | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc.Ed. Entity | ORSC | Older Amer. Title V | CSBG Entity | Total |
|-----------------------------|--------|-------------|--------|-------------|-------------------|-------|------------------------|-------------|---------|
| # of FTE equivalent | 3 | 3 | 3 | 3 | 2 | 1.5 | 1.5 | 2 | 19 |
| % of overall FTE equivalent | 15.79% | 15.79% | 15.79% | 15.79% | 10.53% | 7.89% | 7.89% | 10.53% | 100.00% |

B. Occupancy: based on actual square footage used by each partner with common space (hallways, classrooms, restrooms, Resource Center) prorated based on the percentage of actual space used. Illustrated as follows:

| | ODJFS | WIA Title I | CDJFS | ABLE Entity | Voc.Ed. Entity | ORSC | Older Amer. Title V | CSBG Entity | Total |
|-------------------------|--------|-------------|--------|-------------|-------------------|-------|------------------------|-------------|---------|
| Partner square footage | 750 | 950 | 750 | 1,000 | 1,000 | 200 | 150 | 150 | 4,950 |
| % of overall square ft. | 15.15% | 19.19% | 15.15% | 20.20% | 20.20% | 4.04% | 3.03% | 3.03% | 100.00% |

C. Equal Access: Calculation based on the total of number of partners sharing equally in the cost and/or services. (No table provided, can be applied in Step 3 based on number of partners participating in cost item.)

Step Three: During partner discussions, it may become apparent that not all costs will be applicable to all partners. Some partners may not share in certain expenses as there is not a benefit derived to their respective program from that expense or service. The local area may create cost pools of single or multiple (related) cost items and apply the appropriate fair share methodology to those partners participating in the cost(s). The Area 7 MOU has provided for a standard set of cost pools that each local regional system must follow. These cost pools are provided below.

III. Application of Methodologies to Cost Pools: The shared cost items are pooled in the following manner with the agreed upon allocation methodology applied:

- Facilities Pool - (Occupancy)
- One-Stop Management Pool - (Occupancy)
- Resource Room Pool - (Position Usage)
- Equipment and Supplies Pool - (Position Usage)
- Outreach/Marketing Pool - (Equal Access)
- Miscellaneous Pool (Position Usage)
- Shared Services Pool - (Based on FTE Equivalent noted in Worksheet A)

(Note: The application of specific allocation methodologies will be determined in each local area - this sample for illustrative purposes only)

The Cost Pools are illustrated on the following pages:

Workforce Investment Area #7
Regional One-Stop System # _____
Worksheet B - Resource/Cost Sharing
Allocation of Shared Costs

| Facilities Pool | | | | | | Allocation Base: | | | | |
|---|-------|-------|--------------------|-------|-------------|------------------|------|---------------------|-------------|--|
| Shared Cost Item | Total | ODJFS | WIA Title I Entity | CDJFS | ABLE Entity | Voc.Ed. Entity | ORSC | Older Amer. Title V | CSBG Entity | |
| Level 2 - (site locale) | | | | | | | | | | |
| Base Cost (includes common area) | | | | | | | | | | |
| ilities | | | | | | | | | | |
| aintenance - Janitorial Service | | | | | | | | | | |
| aintenance - Building (repairs, upkeep) | | | | | | | | | | |
| ib-Total | | | | | | | | | | |
| Level 1 - (site locale) | | | | | | | | | | |
| Base Cost (includes common area) | | | | | | | | | | |
| ilities | | | | | | | | | | |
| aintenance - Janitorial Service | | | | | | | | | | |
| aintenance - Building (repairs, upkeep) | | | | | | | | | | |
| ib-Total | | | | | | | | | | |
| Level 1 - (site locale) | | | | | | | | | | |
| Base Cost (includes common area) | | | | | | | | | | |
| ilities | | | | | | | | | | |
| aintenance - Janitorial Service | | | | | | | | | | |
| aintenance - Building (repairs, upkeep) | | | | | | | | | | |

| Outreach/Marketing Pool | | | | | | | Allocation Base: | | | | |
|---------------------------------|-------|-------|--------------------|-------|-------------|----------------|------------------|---------------------|-------------|--|--|
| Shared Cost Item | Total | ODJFS | WIA Title I Entity | CDJFS | ABLE Entity | Voc.Ed. Entity | ORSC | Older Amer. Title V | CSBG Entity | | |
| Brochures and Printed Materials | | | | | | | | | | | |
| Billboard Advertising | | | | | | | | | | | |
| Media Advertising | | | | | | | | | | | |
| Identification Materials | | | | | | | | | | | |
| Signage | | | | | | | | | | | |
| Other | | | | | | | | | | | |
| Total - Outreach/Marketing Pool | | | | | | | | | | | |

| Equipment and Supplies Pool (Partner Use) | | | | | Allocation Base: | | | | |
|---|-------|-------|--------------------|-------|------------------|----------------|------|---------------------|-------------|
| Shared Cost Item | Total | ODJFS | WIA Title I Entity | CDJFS | ABLE Entity | Voc.Ed. Entity | ORSC | Older Amer. Title V | CSBG Entity |
| Level 2 - (site locale) | | | | | | | | | |
| Telephone System/Equipment | | | | | | | | | |
| Copier and Copier Maintenance | | | | | | | | | |
| Fax and Fax Maintenance | | | | | | | | | |
| Postage | | | | | | | | | |
| Furniture | | | | | | | | | |
| Office Supplies (paper, materials, etc.) | | | | | | | | | |
| Common Tracking System Software | | | | | | | | | |
| Computer Equipment | | | | | | | | | |
| Other | | | | | | | | | |

| Level 1 - (site locale) | | | | | | | | | | |
|---|--|--|--|--|--|--|--|--|--|--|
| ilities Pool | | | | | | | | | | |
| ne-Stop Management Pool | | | | | | | | | | |
| source Room Pool | | | | | | | | | | |
| quipment and Supplies Pool | | | | | | | | | | |
| ib-Total | | | | | | | | | | |
| Level 1 - (site locale) | | | | | | | | | | |
| ilities Pool | | | | | | | | | | |
| ne-Stop Management Pool | | | | | | | | | | |
| source Room Pool | | | | | | | | | | |
| quipment and Supplies Pool | | | | | | | | | | |
| ib-Total | | | | | | | | | | |
| Overall Regional System | | | | | | | | | | |
| utreach/Marketing Pool | | | | | | | | | | |
| iscellaneous Pool | | | | | | | | | | |
| ib-Total | | | | | | | | | | |
| otal - All Cost Pools/All Sites | | | | | | | | | | |
| unding Commitments - Cash Contributions | | | | | | | | | | |
| unding Commitments - Other (See Section IV) | | | | | | | | | | |

Step Four: When the funding commitments of all of the partners are outlined in Step 3, the partners then negotiate the method of payment. The method of payment may be in the form of a cash contribution, assuming a specific expense or expenses, or through the provision of goods and/or services. Partner funding must be for the agreed upon shared cost items in Step One. If a partner is assuming a specific expense as a funding commitment, they must provide the documentation of actual cost for audit purposes. Partners may provide additionally funded items above and beyond their allocated share if they so desire but any additionally funded commitments not reflected in the budget does not reduce that partner's funding obligation.

(Note: The following is an example of how some partners may fund their commitments other than through cash contributions.)

IV. Partner Commitments

All partners are funding their fair shares in the form of a cash contribution with the exception of the following partners:

- The Title V - Older Americans Act service provider will be providing a portion of the receptionist duties by supplying a PT receptionist 3 days a week/4 hours a day on M-W-F at a cost of \$xxx/hr, thereby reducing their funding commitment amount by \$xxxxxxx.
- The Perkins Act Vocational Education service provider will assume the cost of the copier maintenance contract for all three copiers thereby reducing their funding commitment by \$xxxxxxx.
- The Community Services Block Grant service provider will provide the itemized supplies noted in the Resource Room Pool thereby covering their entire funding commitment.
- The WIA Title I Programs service provider will assume the cost of paying for the One-Stop Management Pool salaries thereby reducing their funding commitment by \$xxxxxxx.