

November 18, 2022



Program Year 2023 MOU and Budget Guidance (Final)

Overview



1. PY 2023 reminders
2. PY 2023 approach
3. PY 2023 MOU Template updates
4. PY 2023 One-Stop Operating Budget Spreadsheet
5. Q&A

PY 2023 Reminders

For MOUs that take effect July 1, 2023

MOUs and Budget Negotiations



Purpose of MOUs:

- Serve as a tool to achieve **integration**
- Reflect a **shared vision** and commitment of local workforce innovation boards (LWIBs)
- Document each required partner's commitments to service delivery (**where the rubber hits the road**)
- Demonstrate negotiations were in good faith by individuals with authority to **commit financial and programmatic resources**

MOUs and Budget Negotiations (continued)



Decisions reflected in the MOU:

1. Services that can be accessed in the local one-stop delivery system
2. Locations where services are made available
3. Each program partner's method of delivering services (e.g., in person, virtual)
4. Role of one-stop center operators
5. Coordination of referrals
6. Partner commitments to operationalize Service Integration Action Plans
7. Partner commitments to share in infrastructure costs and local service delivery system costs (annually)

PY 2023 Reminders



- ❑ PY 2023 MOU negotiations run January 1, 2023 – May 31, 2023
- ❑ PY 2023 MOUs take effect July 1, 2023
- ❑ PY 2023 runs July 1, 2023 – June 30, 2024 (State Fiscal Year 2024)
- ❑ PY 2023 marks the first year of a new term of the local MOU*

PY 2023 Reminders



WIOA requires MOUs to be renewed at least every three years.

*New MOU term: July 2023 – June 2026

Annual amendments are required to update MOU budgets and partner commitments (FTEs, service delivery, cost sharing).

PY 2023 MOU Timeline



Activity	Date
Guidance for PY23 MOU negotiations issued	11/18/2022
PY 2023 Pre-Program Year Planning form due	12/31/2022
PY 2023 Report of Outcomes due (with draft budgets, waiver requests)	4/14/2023
PY 2023 Final MOU and Budgets due	5/31/2023
PY 2023 begins / MOU effective date	7/1/2023
LWIAs make technical changes based on TA Team feedback	October 2023
Final reviews completed; MOUs uploaded to IL workNet portal	November 2023
PY 2023 ends	June 30, 2024

PY 2023 Approach

Guidance for PY 2023 MOU negotiations

Guidance for MOU Negotiations



What do the Guidelines cover?

- Negotiation of Local MOUs
- Annual Negotiation of Local Shared Costs
- Negotiation Outcomes (for MOUs and Annual Budgets)
- Waiver Process
- Annual Submission Requirements / Amendment Procedures
- Annual State-level Review of MOUs
- Periodic Reconciliation of Shared Costs
- Additional Annual Guidance
- Appendices, including Glossary, Forms and other resources

<https://www.illinoisworknet.com/WIOA/Resources/Pages/Public-Documents.aspx>

PY 2023 Approach



A lot of systemic efforts are unfolding as the pandemic accelerated necessary improvements to ensure an equitable workforce system.

Governor's Commission on Workforce Equity and Access

IWIB Equity Task Force

IWIB Service Integration Work Group

IWIB Business Engagement Committee

Digital Equity Act advocates

Addressing staffing challenges

Enhancing referral pathways

Applying customer-centered design

PY 2023 Approach



The PY 2023 technical changes are designed to help streamline portions of the MOU Template and **test new concepts for feedback** that would inform the development of guidance for PY 2024 MOUs and after.

Approach for PY 2024 and Beyond



More substantive changes may be required in future years of the MOU term given the numerous, systemic efforts related to equity, access, human-centered design, and service integration.

These systemic efforts will continue through 2023 and **culminate with a renewed vision and strategies in Illinois' WIOA State Plan** that takes effect in 2024.

PY 2023 Guidance Topics



1. Service Integration Action Plans
2. Conflict resolution
3. MOU Template clarifications
4. Commitments to assess the customer experience
5. Current One-Stop Operator Agreement Attachment
6. Final MOU and Budget submittal due date changes to 5/31
7. Requirements for using electronic signatures

Service Integration



Update language to acknowledge that as local Service Integration Action Plans are ~~to be~~ updated, **regularly any changes regarding commitments by partners must be** incorporated into the annual MOU and/or MOU amendments.

Service Integration



The MOU Template is updated to acknowledge that **as local Service Integration Action Plans are updated, any changes regarding commitments by partners must be incorporated into the MOU** and/or future MOU amendments.

Conflict Resolution



Require an explanation of the process and roles for conflict resolution in daily operations at any time, not just during the annual negotiation period. The new content should **specify roles and authority of each entity in decision-making when conflicts arise (e.g., leaseholders, one-stop operators, local workforce board, state program administrators and local program administrators).**

Description of Comprehensive One-Stop Services



- ❑ Simplify the MOU narrative template to better **align with the Career Service Matrices** that are attached to each MOU.
- ❑ Clarify required content related to FTE commitments to **reduce inconsistencies between the MOU narrative, service matrices and budget** that frequently result in minor required revisions.

Customer Experience



Include new content to **describe any specific human and financial commitments to coordinate the customer experience through a physical or virtual front door** (e.g., career navigators, customer advocates, cross-program knowledge, frontline training, accessible technology).

Customer Experience (continued)



- a) The narrative can acknowledge that while the commitment is made in the PY 2023 MOU, **the implementation of those commitments will take multiple years and may need additional technical support or professional development to fully implement.**
- b) This content is **subject to feedback to consider in future MOU guidance** and the Regional and Local Plan guidance.

One-Stop Operator Agreement Submittal



The MOU Template now requires the LWIA's current one-stop operator **(OSO) agreement to be attached to the final MOU submittal.**

- Expediates the State-level review process**
- Provides better technical assistance.**

Electronic Signature Guidance



Requirements for using electronic signature remain the same as in Program Year 2022.

- Complete an IOC Form
- No specific electronic signature format, up to the agency/organization
- TA Team encourages ink signatures**

PY 2023 MOU Template Updates

Demonstration

MOU Template – Section 2



2. DURATION OF AGREEMENT (Sec. 121(c)(2)(v)) (Governor’s Guidelines, Section 1, Item 10) (§ 678.500(b)(5))

- *Provide the effective date of the MOU (not the MOU Amendment).*
- *List the agreed upon expiration date (cannot exceed three years).*
- *Confirm the purpose of the umbrella MOU.*

The effective date of the original MOU:

The effective date of the MOU Amendment:

Termination date of the MOU:

Purpose of the umbrella MOU:

An additional explanation of the MOU:

MOU Template – Section 3

3. VISION FOR THE SYSTEM (Governor’s Guidelines, Section 1, Item 1(b))

- *Describe the shared vision for the system and the role of the local board and required partners to a high-quality local workforce delivery system (vision must be consistent with Federal, State, regional, and local planning priorities, as well as the Governor’s Guidelines).*

~~*Outline the general steps to achieve the shared vision, including the aspects of the vision currently in place and a timeline of steps to implement aspects not currently in place within the current term of the MOU.*~~

~~*Note: It is acceptable to describe activities that may take multiple years within the term of this MOU to work towards the vision.*~~

MOU Template – Section 4



4. SERVICE INTEGRATION ([Illinois Service Integration: Overview and Self-Assessment Guide](#))

- *Identify **steps commitments** that required partners will make within the term of this MOU to implement strategies described in the area's Service Integration Action Plan, which is hereby incorporated into this MOU.*

Note that this section will change in future years of the MOU as more state guidance becomes available.

MOU Template – Section 5

5. MOU DEVELOPMENT (Governor's Guidelines, Section 1, Items 3-8)

- *Fully describe the process and efforts of the Local Workforce Innovation Board and required partners to negotiate the MOU, including draft and final versions of MOUs and annual amendments.*
- *Explain the process to be used if consensus on the MOU is not reached by partners during MOU negotiations.*
- *Explain the process and roles for conflict resolution in daily operations, including the protocol and authority of each entity in decision-making (e.g., leaseholders, one-stop operators, LWIB, State program administrators and local program partners).*
- ~~*To demonstrate the engagement of required partners and the Local Workforce Innovation Board, describe the process to review both draft and final commitments to:*~~
 - ~~*○ Service delivery methods,*~~
 - ~~*○ Service locations, and*~~
 - ~~*○ Shared costs.*~~

MOU Template – Section 7



7. DESCRIPTION OF COMPREHENSIVE ONE-STOP SERVICES (Sec. 121 (c)(2)(i)) (Governor's Guidelines, Section 1, Items 8(e)-(g)) (§ 678.500(b)(1))

- ~~• Complete a local service matrix provided as Appendix F. This appendix would be updated annually (the State level service matrix provided in Appendix F is intended to serve as a reference for local negotiations).~~
- In the spaces provided below:
 - ~~○ For each partner, describe how the committed number of FTEs will allow services to be made available during all business hours, including capacity or training of onsite staff, use of contractors and use of direct linkage (as described in each partner's corresponding Direct Linkage Checklist). If there are multiple providers of a program's services, please describe each provider's method of service delivery.~~
 - Explain the programs and services that correlate with the boxes checked in the Career Service Matrices.
 - For each program, describe the staffing plan around which services will be provided by in-person staff, cross-trained partner staff (include the partner's name) or contract provider (include the provider's name), or direct linkage (include the specific method of direct linkage).
 - Describe how each required program's services are provided in real time in all service locations during all regular business hours.

8. PROGRAMMATIC ACCESSIBILITY (Sec. 121 (c)(2)(iv)) (§ 678.500(b)(4))

- *Describe features or methods to ensure the comprehensive one-stop center and any designated affiliate sites or specialized centers provide access to all required career services in the most inclusive and appropriate settings for each individual participant, including assuring that individuals with barriers to employment, such as individuals with disabilities, can access available services (§678.500(b)(4)).*
- *Describe any specific human or financial commitments partners are making to coordinate the customer experience through a physical or virtual front door. Examples include: using career navigators, customer advocates, cross-program knowledge, frontline training, accessible technology or other support systems.*

Note: Provide as much specificity as possible for each commitment made as a local workforce system, including whether individual partners are making a specific human or financial commitment to carry out that local system approach.

MOU Template – Section 11



11. REFERRAL PROCESS (Sec. 121 (c)(2)(iii)) (Governor’s Guidelines, Section 1, Item 8(i)) (§678.500(b)(3)-(4))

- ~~• *In the spaces provided below, address all of the following:*~~
 - ~~• *Identify the method of making referrals for each partner.*~~
 - ~~• *Identify the method of tracking referrals.*~~
- *Describe the local one-stop operator’s role and responsibilities for coordinating referrals among required partners (§678.500(b)(3)).*
- *Complete the Referral System matrix included on page 11 of this MOU Template.*

MOU Template – Section 12



12. SHARED DATA AND INFORMATION (Governor’s Guidelines, Section I, Item 8(k))

- *Describe how core program partners will share data and information and will collaborate to assure that all common primary indicators of performance for the core program partners in the local area will be collectively achieved.*
- ~~*Cite examples of how service integration is leading to greater customer access for services and appropriate customer information being shared among partners. Include specific actions, partners involved and how customer access and/or information sharing improved.*~~

NOTE: Partners are encouraged to seek clarification from their respective core partner state agency and/or data staff.

MOU Template – Section 14



14. AMENDMENT PROCEDURES AND RENEWAL PROVISIONS (Sec. 121 (c)(2)(v)) (Governor’s Guidelines, Sections 5 & 6) (§ 678.500(b)(5)(6))

- *Describe the procedures for amending the MOU with an **annual one-stop operating budget with Infrastructure Funding Agreement.***
- *Describe the procedures for amending the MOU any time substantial changes have occurred before the MOU’s three-year expiration date.*

NOTE: Ensure the MOU reflects the most recent date as amendments and renewals are approved.

MOU Template – Section 18



18. ATTACHMENTS

Each Party acknowledges and agrees that the Attachments listed in this Section are attached hereto and incorporated into this MOU. Further, each Party acknowledges and agrees that by signing this MOU it agrees to be bound by the terms and conditions of the Attachments.

LOCAL SERVICE MATRIX FOR COMPREHENSIVE ONE-STOP CENTERS

INCLUDES:

- CAREER SERVICES AVAILABLE THROUGH THE LOCAL COMPREHENSIVE ONE-STOP CENTER(S)
- OTHER PROGRAMS AND ACTIVITIES AVAILABLE THROUGH THE LOCAL COMPREHENSIVE ONE-STOP CENTER(S)
- SERVICE DELIVERY METHOD THROUGH THE LOCAL COMPREHENSIVE ONE-STOP CENTER(S)

IDES NON-DISCLOSURE AGREEMENT

ONE-STOP OPERATING BUDGET SPREADSHEET

CURRENT ONE-STOP OPERATOR AGREEMENT

OTHER

Service Delivery Method Through the Comprehensive One-Stop Center(s)

**TEMPLATE
LOCAL SERVICE MATRIX FOR COMPREHENSIVE ONE-STOP CENTERS**

SERVICE DELIVERY METHOD THROUGH THE LOCAL COMPREHENSIVE ONE-STOP CENTER

PROGRAM	SERVICES PROVIDED THROUGH CROSS-TRAINED PARTNER STAFF	SERVICES PROVIDED THROUGH CONTRACT PROVIDERS	SERVICES PROVIDED THROUGH DIRECT LINKAGE
Title I (Adult, Dislocated Worker, Youth)	Services:	Services:	Method:
Title II: Adult Education Literacy	Services:	Services:	Method:
Title III: Employment Programs under Wagner-Peyser	Services:	Services:	Method:
Title IV: Rehabilitation Services	Services:	Services:	Method:
Post-secondary Career and Technical Education under Perkins	Services:	Services:	Method:
Unemployment Insurance	Services:	Services:	Method:
Job Counseling, Training and Placement Services for Veterans	Services:	Services:	Method:
Trade Readjustment Allowance (TRA)	Services:	Services:	Method:
Trade Adjustment Assistance (TAA)	Services:	Services:	Method:
Migrant and Seasonal Farmworkers	Services:	Services:	Method:
National Farmworker Jobs Program	Services:	Services:	Method:
Community Services Block Grant (CSBG)	Partner:	Provider:	Method:
	Services:	Services:	Method:
Senior Community Services Employment Program (SCSEP)	Partner:	Provider:	Method:
	Services:	Services:	Method:

No More Table
for the Local
Service Delivery
Method

PY 2023 One-Stop Operating Budget Spreadsheet

Tips

MOU Budget Spreadsheet



The PY 2023 one-stop operating budget spreadsheet (“MOU budget spreadsheet”) did not change from PY 2022.

PY 2023 Tips



In the MOU budget spreadsheet

- ✓ Do NOT change formula in the spreadsheet
- ✓ Fill in the notes to provide more detail (e.g., partners sharing FTEs)
- ✓ Remember to complete the OSO tab (see PY 2022 guidance)

WIOA Implementation Documents & Updates Webpage:

<https://www.illinoisworknet.com/WIOA/Resources/Pages/Public-Documents.aspx>

PY 2023 Tips



In General

- ✓ Continue to review, update and submit Reopening Plans
- ✓ Utilize most recent MOU Template (New for PY 2023)
- ✓ Utilize most recent budget template (Unchanged from 2022)
- ✓ Submit your OSO Agreement with the MOU (New for PY 2023)

WIOA Implementation Documents & Updates Webpage:

<https://www.illinoisworknet.com/WIOA/Resources/Pages/Public-Documents.aspx>

Email address

wioaplan@illinoisworknet.com

- Questions
- Technical assistance
- Report of Outcomes
- Draft Budget
- Waiver Requests
- Final Submittals

PY 2023 MOU Guidance



QUESTIONS

Thank you

Bethany Jaeger, KEB, bethanyj@kebcpa.com

Drew Thomason, KEB, drewt@kebcpa.com

KEB Phone: (217) 789-0960