

**Attachment A**  
**Workforce Innovation and Opportunity Act (WIOA)**  
**Joint Partner Local Umbrella Memorandum of Understanding (MOU)**  
**Guidance**

The information contained in this document includes a description of the MOU components, content, and activity benchmarks that are intended to guide the development of a successful MOU. This policy guidance specifies required elements of the local umbrella MOU and establishes a “floor” set of expectations upon which the 16 local areas can build customized elements.

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**I. PURPOSE**

The purpose of the local Umbrella MOU is to:

1. **Articulate a coordinated vision for organizing the Massachusetts public workforce system** to produce the best possible outcomes for shared customers – youth, job seekers and businesses.
2. **Articulate the establishment of local area partnerships** to work on how services can be connected, integrated or enhanced by sharing staffing, resources or jointly designed services in ways that improve outcomes for “shared” customers – youth, job seekers and businesses.
3. **Establish agreement at the local level to design and coordinate service delivery systems** through the OSCC Required Partners and non-required partners to ensure that Massachusetts businesses and job seekers, including those individuals with disabilities, low-income status, Veteran status, education or language barriers, and other individuals “shared” by the MOU partners achieve/demonstrate measurable outcomes in the areas of education, training, job placement/retention, and wages.
4. **Establish a definition for and set of shared costs and infrastructure costs** to support newly designed partnerships and service delivery between the required WIOA partners, such as Massachusetts Rehabilitation Commission (MRC) Area Offices, non-WIOA partners and/or affiliated centers, and the local Workforce Boards/One-Stop Career Centers in local areas as authorized by WIOA.

## II. MISSION

To coordinate the education, workforce and business services of the OSCC Required Partners and non-required Partners through the One-Stop Career Centers to support job-driven career pathways for individuals that lead to a more informed, educated, and skilled workforce that meets the 21<sup>st</sup> century needs of businesses.

## III. ONE-STOP CAREER CENTER REQUIRED PARTNERS (OSCC Required Partners)

- A. The Workforce Innovation and Opportunity Act (WIOA) required partners are defined by WIOA in Section 121 (b) and WIOA Regulations 20 CFR Part 678.400 as mandatory partners in the One-Stop Career Centers and include:
1. **The Adult Program (Title I of WIOA)**, as part of the Department of Career Services (DCS), Executive Office of Labor and Workforce Development (EOLWD);
  2. **The Dislocated Worker Program (Title I)**, as part of the Department of Career Services (DCS), EOLWD;
  3. **The Youth Program (Title I)**, as part of the Department of Career Services (DCS), EOLWD;
  4. **The Adult Education and Family Literacy Act Program (Title II)**, as part of Adult and Community Learning Services (ACLS), Department of Elementary and Secondary Education (DESE) Executive Office of Education (EOE);
  5. **The Wagner-Peyser Act Program** (Wagner-Peyser Act, as amended by Title III), as part of DCS, EOLWD;
  6. **The Vocational Rehabilitation Program** (Title I of the Rehabilitation Act of 1973, as amended by Title IV), as part of the Massachusetts Rehabilitation Commission (MRC) and Massachusetts Commission for the Blind (MCB), Executive Office of Health and Human Services (EOHHS);
  7. **Federal-state unemployment compensation program**, as part of the Department of Unemployment Assistance (DUA), EOLWD;
  8. **Trade Adjustment Assistance for Workers Programs** (Activities authorized under chapter 2 of Title II of the Trade Act of 1974 (19 U.S.C. 2271 et seq.)), as part of DCS, EOLWD;
  9. **Jobs for Veterans State Grants Program** (Programs authorized under 38, U.S.C. 4100 et. seq.) as part of DCS, EOLWD;
  10. **Temporary Assistance for Needy Families Program** (42 U.S.C. 601 et seq.) as part of Department of Transitional Assistance (DTA), EOHHS;
  11. **Employment and Training Programs under the Supplemental Nutrition Assistance Program**, (Programs authorized under section 6(d)(4) of the Food and Nutrition Act of 2008 (7 U.S.C.2015(d)(4)), as part of DTA, EOHHS;
  12. **Senior Community Service Employment Program** (Programs authorized under title V of the Older Americans Act of 1965 (42 U.S.C. 3056 et seq.)); and

**B. Additional non-required Partners** suggested for local area consideration in the development of the local MOU include:

1. Non-profit/Community Based Organizations
2. Massachusetts Office of Business Development
3. Massachusetts Department of Higher Education
4. Massachusetts Department of Veterans Services
5. Commonwealth Corporation
6. Business associations
7. Philanthropic Organizations
8. Veterans Service Officer (VSO)
9. Ex-Offender Program (Sec. 212 of the Second Chance Act of 2007)
10. Job Corps
11. Youth Build

#### **IV. ASSURANCES:**

The following Assurances are required to be incorporated into each local MOU.

Local Boards and the OSCC Required Partners and non-required Partners agree to conduct the following activities at a local level:

1. Enter into a local umbrella MOU with the local Workforce Board relating to operation of the One-Stop delivery system.
2. Participate in the operation of the One-Stop delivery system consistent with the terms of the local umbrella MOU, the requirements of WIOA, and the requirements of Federal laws authorizing the programs and activities.
3. Define “shared” customers between Partners to create a clear understanding of how multiple providers, services and resources should support youth, job seekers, and businesses.
4. Redesign the One-Stop Career Center customer flow and service practices across partner agencies, including ensuring the accessibility and availability of services to “shared” customers.
5. Utilize robust technology tools to scale-up practices and provide more significant supports for individuals with barriers to employment, including basic skills assessment, remediation, and career development tools.
6. Track and evaluate the outcomes for individuals who face barriers to employment.
7. Use a portion of the funds available for programs and activities to maintain the One-Stop Career Center system, including infrastructure and shared costs of One-Stop Career Centers, through methods agreed upon by the local board, chief elected official, and partners. If no consensus on methods is reached, the Governor, after

consultation with the chief elected official, local board and state board shall determine the portion of funds to be provided (WIOA sec. 121(a) (h) (1) (C)).

8. Provide representation on the local workforce development boards as appropriate and/or participate in local workforce development board ad hoc activities/events or on standing committees.
9. The local umbrella MOU will be reviewed, and if substantial changes have occurred, renewed, not less than once every 3-year period to ensure appropriate funding and delivery of services. The local umbrella MOU must be updated to reflect any change in the One-Stop Career Center required partner infrastructure cost contributions.

## **V. LOCAL UMBRELLA MOU**

The Workforce Innovation and Opportunity Act (WIOA) Sec. 121 (c) and WIOA Regulations 20CFR Parts 678.500-510 require that a Memorandum of Understanding be executed between Local Workforce Development Boards (Local Board) and the OSCC Required Partners, with the agreement of the chief elected official.

The Local Board will act as the convener of MOU negotiations and together with OSCC Required Partners and non-required Partners, the umbrella MOU will shape how local One-Stop Career Center Services are delivered.

### **A. Memorandum of Understanding Content Development Process**

The Local Board will convene representatives of the OSCC Required Partners and non-required Partners and other stakeholders in the local workforce area to develop shared service strategies for youth, job seekers and businesses and identify related shared customer flow.

Local strategies will include but not be limited to operational and service workflows, related referral processes, coordinated staff development and training, marketing and community integration, co-locations of staff (physical or virtual) and the nature and provision of related infrastructure and shared costs.

These strategies will be designed locally to meet the service, resource and technology needs of the career center and take into consideration the individual characteristics, service needs and resources of each of the OSCC Required Partners.

Strategies should be both data- and demand-driven to advance the development of local service strategies and the needs of businesses and job seekers.

The umbrella MOU will include agreements on the specific infrastructure and shared program costs including the method by which revenue and costs will be supported by each partner.

Cost calculations will take into consideration the proportionate share of use by each partner consistent with budgets, mandates and program limitations and must be spent solely for purposes allowable according to the partner-authorizing statutes and other applicable legal requirements, including Federal cost principles.

## **B. Memorandum of Understanding Content**

The local umbrella MOU must include but is not limited to:

1. A description of the process to develop an umbrella MOU.
2. A description of the needs and size of the WIOA priority populations and other key customer groups in the region identified by the umbrella MOU Partners. At a minimum, WIOA requires that each local MOU address: unemployment insurance claimants; low-income adults including TANF and SNAP recipients, homeless; Adult Education participants (Title II); individuals with disabilities (Vocational Rehabilitation Title IV); Veterans; older workers; re-entry populations; and, youth, including youth with barriers to employment.
3. A description of the continuum of services available for each priority population in the local workforce area based on a customer-centered design or career pathway model. Include a map for customer flow across MOU partners for each priority population. The description should include:
  - a. A definition of shared customers between MOU Partners (both OSCC Required Partners and non-Required Partners) along the service continuum (*e.g. the characteristics and estimated numbers of individuals who could be co-enrolled between Adult Education Title II and One-Stop Career Center, etc.*).
  - b. The types of supports and services available for each priority population through the MOU partners (both OSCC Required Partners and non-Required Partners) that promote the education, training and career advancement of individuals receiving services. Stipulate the roles of the MOU partners in providing supports and services.
  - c. Methods for referring individuals or business customers between the partners for appropriate services and activities.
4. A description of the continuum of services available for business customers in the local workforce area based on a customer-centered design or career pathway model. Include a map for the business customer flow across MOU partners in the local area, including the types of supports and services available, the roles of the organizations in providing integrated services and referrals between organizations for the business customers.
5. A description of the access to technology and materials available through One-Stop Career Center delivery system. Include exploration of access to One-Stop Career

Centers services (in-person, virtual, etc.) during times when specific customers from OSCC Required Partner programs are available (e.g. evenings and weekends). [This issue would be locally negotiated based on resources and approved at a state-level when staffing contracts are involved.]

6. A plan for coordinated staff development and training.
7. Assurances of participation of the OSCC Required Partners in the competitive selection process for the One-Stop Career Center lead operator/service provider in the local workforce area.
8. A final plan or interim plan to fund joint costs:
  - a. Funding of infrastructure costs of One-Stop Career Centers
  - b. Funding of shared services and operating costs of service delivery system

NOTE: Local funding agreements must satisfy the requirements of section 121(h) of WIOA for purposes of funding the One-Stop system in PY 2017.

NOTE: State partners are working on agreement to utilize the current integrated budget format to show in-kind and shared costs, including infrastructure costs as a way to record joint costs.

9. Duration of the MOU including commencement and termination date, and include the clause “unless otherwise terminated by agreement of all parties or superseded.”
10. Assurances that the MOU review will occur not less than every three years. WIOA Sections 121(c) (g) require that the MOU shall be reviewed not less than once every 3-year period to ensure appropriate funding and delivery of services, also including effectiveness, physical and programmatic accessibility. WIOA Regulations Subpart C 20 CFR Part 678.500 further requires MOU renewal following the 3-year review if substantial changes have occurred.
11. The MOU will contain the assurances outlined in Section IV of this policy guidance.
12. The MOU may include other provisions agreed to by all parties that are consistent with all partner programs’ services and activities, authorizing statutes and regulations.
13. The MOU must include all requirements as set-forth in the WIOA umbrella MOU policy guidance.
14. The local MOU will reflect an agreement of the MOU partners to jointly review the WIOA mandated performance metrics for the region or metrics negotiated as part of any shared and infrastructure contract costs between a local area (Board) and the mandated OSCC partner, including incentives and penalties.

- The MOU is fully executed when it contains the signatures of the Local Workforce Board, OSCC Required Partners, and the Chief Elected Official (CEO) and stipulates the duration for which the MOU is in effect.
- As stated above, the MOU must be updated not less than every 3 years to reflect any changes in the signatory official of the Board, One Stop Career Center Partners, and Chief Elected Official (CEO) or changes to infrastructure cost contributions.

### **C. Infrastructure and Shared Cost Funding**

Infrastructure and shared costs are used to support the coordinated efforts of each One-Stop Career Center and its required Partners to ensure job-driven career and service pathways for shared customers, as well as the general operation of the OSCCs. WIOA sec. 121(h), sec. 121(i), WIOA Regulations 20 CFR 678, and Subpart E 20CFR 700 -760 require that One-Stop Career Center partners contribute jointly to fund infrastructure costs, and use a portion of the funds available to support their programs, activities and services operated through a local comprehensive One-Stop Career Center consistent with the proportional burden, program mandates and limitations and the state infrastructure cost default funding caps, in cases where local consensus is not reached.

These supporting costs are defined as shared and infrastructure costs. These are two different types of costs (see next section for definitions). The proportion of the shared and infrastructure costs paid by each OSCC Required Partner (Section III of this guidance) must be in accordance with Federal cost principles, which require that all costs must be allowable, reasonable, necessary, and allocable to the program and all other applicable legal requirements.

The Core Partner funding of costs is intended to:

1. Maintain the One-Stop delivery system to meet the needs of the local area;
2. Reduce duplication by improving program effectiveness through the sharing of services, resources and technologies among Partners;
3. Reduce overhead by streamlining and sharing financial, procurement, and facilities costs;
4. Encourage efficient use of information technology;
5. Ensure that costs are appropriately shared by OSCC partners by basing contributions on proportionate share of use, and requiring that all funds are spent solely for allowable purposes;
6. Support the development and implementation of career and service pathways within the career center in coordination with required partners; and
7. Ensure that services provided by One-Stop center are allowable under the Partner's program.

Section XI of this guidance provides the Required Partners' agency-specific guidelines to be utilized during local MOU negotiations to assist in determining the proportionate share

of shared and infrastructure costs (shared costs are defined in VI. 1 and infrastructure costs are defined in VI. 2) for each OSCC Required Partner's program.

These guidelines are consistent with individual Partners' mandates, budgets and program limitations and take into consideration the default caps on required contributions delineated in WIOA 121 (h) and WIOA Regulations 20 CFR Part 678.735. Once contributions are identified locally via successful MOU negotiations or at the state level if local consensus fails, the method of transferring negotiated Partner funds/contributions to the OSCC system may be via direct contract from the Partner to the local area or to the area via funds/contributions transferred from the partner to EOLWD, as appropriate.

## **VI. COSTS DEFINED**

In addition, state partners are encouraging all of the MOU Partners to see shared costs as a way to quantify and articulate the costs associated with better integration of services from the customer perspective in order to demonstrate the in-kind and cash resources that Partners utilize to set up new programming. The federal WIOA law and regulations focus on utilizing contributions from the mandated One Stop Career Center Partners as the way to provide necessary resources to ensure access to Partner program services through the One-Stop Career Centers in at least 1 comprehensive One Stop Career Center in the region. Section XI. outlines an "approach" to setting up a dialogue in each region that starts with team building, asset mapping, service design and then the consideration for how the local areas approach shared and infrastructure costs.

Additional federal guidance on costs is forthcoming and may result in further refinement of this policy.

### **1. Shared Costs**

Shared costs are costs jointly identified by the local Workforce Boards, One-Stop Career Center Operators, and OSCC Required Partners to provide services to shared customers (co-enrolled participants) across program staff and facilities. One-Stop Career Centers and OSCC Required Partners will develop the appropriate activities within the MOU for the shared customer pools. Activities and services include, but are not limited to:

- Intake
- Needs assessment
- Basic skills assessments
- Identification of appropriate services to meet needs
- Referrals to other One-Stop Career Center Partners
- Business services
- Support for programs to invest in or create access to assistive technologies

Shared costs WIOA 121 (i) and WIOA Regulations 20 CFR Part 678.760) must be determined as part of the Local Umbrella MOU and may be comprised of cash and non-cash resources.

Potential in-kind shared costs may include:



- Co-location of staff
- Technology (e.g. Partner donation of computers/software)
- Event costs
- Materials provided to the OSCC from the Partner program (e.g. books, curriculum, testing materials, etc.)
- Cost paid by the Partner program for services to the customer (e.g. education/training, tuition, staff salaries, etc.) used by the program Partner to benefit the “shared” customer (i.e. the leveraged cost from the Partner that is paying for services for the customer)

Partners will convene locally within MOU planning teams and agree to the roles and responsibilities each Partner will have in the development of an integrated service delivery strategy that meets the needs of customers and businesses. Shared costs will be identified to fully realize the agreed upon service delivery strategy, i.e., staffing, space, technology, etc.

## **2. Infrastructure Costs**

Each required Partner must support the One-Stop delivery system by jointly funding the OSCC infrastructure for at least one comprehensive One-Stop Career Center in a region through Partner contributions whether or not they are physically located in the OSCC.

One-Stop Career Center infrastructure costs are defined as non-personnel costs necessary for the general operation of the center, including:

- Facility rental costs
- Utilities and maintenance
- Equipment (including assessment-related and assistive technologies for individuals with disabilities)
- Technology to facilitate access to the One-Stop Career Center (including planning and outreach)
- Common One-Stop Career Center delivery system identifier costs (signage and other identifier-related)

Infrastructure costs are funded either through:

- A local One-Stop Career Center infrastructure funding mechanism determined by a local agreement between the Local Board, Chief Elected Official (CEO) and OSCC Required Partners; or
- A State One-Stop Career Center infrastructure funding mechanism set by the Governor, after consultation with the CEOs, Local Workforce Development Boards and State Board that determines the OSCC Required Partner contributions.

## **VII. LOCAL ONE-STOP INFRASTRUCTURE FUNDING MECHANISM**

1. In the local funding mechanism, the Local Workforce Development Board, Chief Elected Official(s), and OSCC Required Partners agree to amounts and methods of calculating amounts each required Partner will contribute for One-Stop Career Center infrastructure funding, include infrastructure funding terms within the MOU and sign the MOU.
2. The local infrastructure funding must meet all of the following requirements:
  - a) The infrastructure costs are funded through cash and fairly evaluated in-kind Partner contributions and can include any funding from philanthropic organizations or other private entities or through alternative financing options.
  - b) Contributions must be negotiated between the Local Board, CEOs and OSCC Required Partners.
  - c) The proportionate share of funding from each OSCC Required Partner must be based upon a reasonable cost allocation methodology whereby costs are charged to each partner in proportion to relative benefits received, and must be allowable, reasonable, necessary and allocable.
  - d) Partner shares must be periodically reviewed and reconciled against actual costs incurred.

## **VIII. STATE ONE-STOP INFRASTRUCTURE FUNDING MECHANISM**

In the State One-Stop Career Center infrastructure funding mechanism, the Governor, after consultation with the Chief Elected Officials, State Board and Local Workforce Development Boards determines the OSCC Required Partner's contributions, based upon a methodology where infrastructure costs are charged to each Partner in proportion to relative benefits received and consistent with the Partner's programs' authorizing laws and regulations including Federal cost principles, and other applicable legal requirements.

WIOA Section 121 (h) and WIOA Regulations 20 CFR Part 678.735 includes the limitation for the Required Partner contributions based on a percentage of their Federal funding allocation. These limitations do not apply at the outset to the local funding mechanism, instead are a cap on required contributions determined by the Governor if consensus is not reached at the local level between the Local Workforce Development Board, Chief Elected Officials and WIOA Required Partners.

## **IX. MOU IMPASSE**

The local Workforce Board must report to the State Board, Governor, and the appropriate WIOA relevant state agencies if MOU negotiations with OSCC Required Partners, not pertaining to infrastructure funding, have reached an impasse. Impasses related to infrastructure costs must be resolved using the State infrastructure cost funding mechanism as defined above.

The Local Workforce Development Board and Partners must document the process and efforts that have taken place in MOU negotiations up to the point of impasse.

The State Required Partners may consult with the appropriate Federal agencies to address the impasse related to issues other than infrastructure costs.

If the Local Board and the Local OSCC Required Partners cannot execute an MOU that meets the statewide expectations outlined in the statewide MOU, the Departments administering WIOA funding and departments administering One-Stop Career Partner programs will finalize the agreement for the local area through an approved dispute resolution process as provided for by the State Board and the Governor.

### **Interim Infrastructure Funding Agreement**

In accordance with WIOA Regulations 20 CFR §678.510 (b), if agreement regarding infrastructure costs is not reached when other sections of the MOU are ready, an interim infrastructure funding agreement may be included instead.

An interim infrastructure funding agreement must be finalized within 6 months of the signing of the MOU. If it is not finalized within that timeframe, the Local Board must notify the State Board and the Governor as described in WIOA 121 (h) and the WIOA regulations 20 CFR Part 678.725) and the state infrastructure mechanism will trigger.

The Local Umbrella MOU must be fully executed and in effect on July 1, 2017.

## **X. PARTNER AGREEMENTS**

Local Boards and OSCC Required Partners and non-required Partners agree to address the following items and review and revise as needed:

1. **Agreement to participate on a local MOU Planning Team**, including representation from OSCC Required Partners and non-Required Partners (Title I, II, III, IV, TANF/SNAP, Unemployment Insurance, SCSEP, Veterans and other locally identified partners such as higher education, community-based organizations serving special populations etc.);
2. **A strategy and process to share information on the labor market** analyzed by the Workforce Board between the local MOU Partners to align education and training programs with high-demand career pathways (lead by local Workforce Boards);
3. **The development of career pathway maps or service flowcharts for youth 16-24** across WIOA Youth programs, local One-Stop Career Centers, Adult Education (Title II)/DESE, TANF/DTA, MRC/MCB, YouthWorks, and other key partners in the local area. Local MOU Partners can customize the template for a Youth Career Pathway developed by the WIOA Steering Committee's Youth Committee (ATTACHMENT C- Service Flowchart for Youth Career Pathways). The "flowchart" will identify the roles for each Partner in supporting career pathway development specifically for youth.

In order to implement the elements of career pathways models that require shared program design, service delivery, staffing or infrastructure costs, local areas could consider the following for shared resources:

- a) The development of a WIOA youth procurement process to include how services will be aligned as a method to leverage resources and to provide a continuum of services for out-of-school youth.
  - b) Identify and implement strategies for referrals and co-enrollment of youth 16-24 across Core WIOA Programs.
  - c) Leveraging resources collaboratively for the purpose of expanding access to credentials and work-based learning for low-skilled individuals and out-of-school youth 16-24 (local Partners can pursue joint applications for “sector” initiatives, expanded use of federal On-the-Job Training funding, expand “pathways” funding on specific populations and career pathways, align programming with YouthWorks, etc.)
4. **Develop or refine service flowcharts for unemployment insurance claimants** through the Reemployment Services and Eligibility Assessment (RESEA) program (ATTACHMENT C - Service Flowchart for RESEA). The Workforce Development Boards, One-Stop Career Centers and the Department of Unemployment Assistance will continue to refine the service flow for individuals receiving unemployment insurance who are required to participate in the RESEA Program.
5. **Develop career pathway maps or service flowcharts for low-skilled, low-income individuals for “shared customers” between service providers.** This could include the local One-Stop Career Centers, Adult Education (Title II)/DESE, TANF/DTA and other key partners such as community-based organizations serving immigrants, refugees or homeless individuals.

Local MOU Partners can customize the template developed by the WIOA Steering Committee (ATTACHMENT C - Service Flowchart for Low-Skilled, Low-Income Individuals). The local area Partners will identify the roles for each Partner in supporting career pathway development specifically for low-income, low-skilled adults, limited English proficient adults and incorporate Career Pathway Guidelines developed by Adult and Community Learning Services (ACLS) for ABE/ESOL programs.

In order to implement the elements of a career pathway model that requires shared program design, service delivery, staffing or infrastructure costs, local areas could consider the following ideas for shared resources:

- a) Leverage resources collaboratively for the purpose of expanding access to credentials and work-based learning for low-skilled individuals (local partners can pursue joint applications for “sector” initiatives such as the Workforce Competitiveness Trust Fund or Workforce Training Fund, expanded use of

federal On-the-Job Training funding, expand the ABE Career Pathway models piloted in regions, “pathways” funding on specific populations and career pathways, etc.)

- b) Align and map out the supports for individuals from different programs along a career pathway to support long-term, credential attainment.
  - Staff across agencies work on a cross-agency, “case management” team to connect child care resources, public benefits, education and training through the Employment Services Program (ESP), SNAP, Employment and Training, One-Stop Career Centers (including the Community College Navigators), Adult Education, Community Colleges and other partners.
  - Priorities for customer access to Adult Education enrollment, One-Stop Career Center ITAs, community college grants or other resources are created for “shared” customers who are moving along a career pathway, subject to consideration of any particular program restrictions or requirements.
  - Leverage the Career Ready 101 tools across partners for individuals with barriers moving along a career pathway. ABE, OSCC, and Community Colleges can collaborate to provide access to Career Ready 101 to individuals who are “shared” customers across programs, including TANF/SNAP, MRC, MCB, Veterans and other partners.
- c) Expand existing Career Pathways Models in regions. Workforce Boards, One-Stop Career Centers and WIOA partners (TANF, MRC, MCB, Veteran’s etc.) work with ACLS to support the ABE Career Pathways models and offer comprehensive services for “shared customers”.
- d) Out-stationing of staff across Core Program sites (One-Stop Career Centers, Partner or community sites) based on career pathway maps and customer needs.
  - On-site expertise of Core WIOA program staff at One-Stop Career Centers to develop integrated assessment, referrals, targeted workshops and access One-Stop Career Center resources to support a career pathway for individuals e.g. basic skills, high school equivalency preparation, ESOL, Career pathway programs, Career Ready 101, National Career Readiness Certificate (NCRC), Community College Navigators (information on higher education options/financial aid), financial counseling, job fairs, employer industry panels job seekers, etc. Local partners agree on a job description for out-stationed personnel to meet local customer needs to help navigate the broader workforce system (e.g. understand One-Stop services and CORE Programs), refer to guidance set by state agencies.
  - Staff work together to develop on-site workshops for job seekers at One-Stop Career Centers provided by staff from WIOA Partner programs (OSCC, Adult

Education, DTA, Higher Education, etc.) tailored to individuals with limited education and skills that provide information on specific resources for this population (e.g. high school equivalency preparation, ESOL, Career Pathway programs, transition to college opportunities), Career Ready 101, National Career Readiness Certificate (NCRC) child care vouchers (DTA), public benefits counseling, transportation (DTA), Community College Navigators (information on higher education options/financial aid), financial counseling, job fairs, employer industry panels job seekers, etc. (Offered at various sites.)

- One-Stop Career Centers ensure adequate and designated space for the out-stationed staff in each region for each program. Career Center staff provides training and ongoing support to the out-stationed personnel.

6. **Develop career pathway maps or service flowcharts for adult individuals with disabilities who are “shared customers”** between local One-Stop Career Centers, and Title IV Vocational Rehabilitation through MRC and MCB and other Partners. Local MOU Partners can customize the template developed by the WIOA Steering Committee (ATTACHMENT C - Service Flowchart for Individuals with Disabilities). The local MOU Partners will identify the roles for each Partner in supporting career pathway development specifically for individuals with disabilities.

In order to implement the elements of a career pathway model that requires shared program design, service delivery, staffing or infrastructure costs, local MOU Partners could consider the following for shared resources:

- a) Adoption of best practices from the Disability Employment Initiative grants, such as employer-driven training, on-the-job training, resource teams for career counseling (Integrated Resource Team) and other collaborative initiatives;
- b) Align and map out the supports for individuals from different programs along a career pathway to support long-term, credential attainment. (Attachment C - Case Studies of Career Pathways for Individuals with Disabilities);
- c) Creation and implementation of workshops for job seekers with disabilities at One-Stop Career Centers covering specific resources, SSI and VR benefits counseling, pre- and post-employment support services offered through VR, job fairs, employer industry panels for job seekers, etc. (Offered at various sites.)
- d) Access to support and adaptive technologies;
- e) Out-stationing of staff across Core Program sites (One-Stop Career Centers, Partner or community sites) based on career pathway maps and customer needs;
- f) Facilitate financial support for ABE programs to invest in assistive technologies for customers with disabilities.

7. **Develop career pathway maps or service flowcharts for Veterans** who are “shared customers” between local One-Stop Career Centers and the Department of Veterans’ Services and other key partners. Local MOU Partners can customize the template developed by the WIOA Steering Committee (Attachment C - Service Flowcharts for Veteran’s). The local area Partners will identify the roles for each Partner in supporting career pathway development specifically for Veterans.

In order to implement the elements of a career pathway model that requires shared program design, service delivery, staffing or infrastructure costs, local Partners could consider the following for shared resources:

- a) Creation and implementation of workshops for job seekers who are Veterans at One-Stop Career Centers covering specific resources, Disabled Veteran Outreach Program (DVOP)/Local Veterans Employer Representative (LVER), Department of Veterans resources, use of TORQ for career counseling, Career Ready 101, NCRC testing, employer industry panels job seekers, resources for Veterans with disabilities (e.g. access to support and adaptive technologies) etc. (could be offered at various sites.)
  - b) Creation of a referral processes for directing Veterans with Significant Barriers to Employment (SBE) to local DVOPs and other appropriate services.
8. **Develop career pathway maps or service flowcharts for businesses** that seek to partner with the public workforce system and other MOU Partners to meet their talent sourcing, talent development, and pipeline development needs (Attachment C - Service Flowcharts for Business Services). Specific strategies and system collaboration could include:
- a) Develop a local business talent assessment, utilizing regional labor market data, regional economic development agencies, and business intelligence gathered from interactions with business representatives and MOU partners.
  - b) Develop a coordinated, streamlined regional strategy for business partner outreach and follow up.
    - o Utilize MassBizWorks as a starting place to develop a regional consultation process to coordinate partners, access statewide training for regional business services staff and share information.
  - c) Share feedback directly from businesses that utilize public services.

## **XI. APPROACH TO AN INTEGRATED SERVICE DELIVERY SYSTEM**

The OSCC Required Partners support an integrated service delivery system that is customer focused and meets the needs of priority populations as well as local businesses. As such, the OSCC Required Partners will convene locally to discuss and agree to their roles and responsibilities toward ensuring an integrated service delivery system.

The most critical first step for the local umbrella MOU team in each region is the process of building a sense of collaboration and trust across the partners. While many regions have long histories of partnership, the Commonwealth is expecting

each region to look at service delivery and support to job seekers and business through a customer-centered design focus that will require new thinking and new ways of partnering.

It is critical that Local Workforce Development Boards lead Partners through a discussion of vision for the region, a dialogue on needs for each priority population, and a basic mapping process of how existing services can fit together to support an individual along an integrated, career pathway that may span several years and systems. This type of dialogue and system mapping will begin to lay out a picture of how each Partner organization is bringing resources to the table as “shared” costs and will start to outline the type of infrastructure funding that can be contributed to the comprehensive One-Stop Career Center in the region.

During discussions on service delivery design and customer flow among local Partners, resources and costs will be identified to fully realize the service delivery strategy, i.e., staffing, space, technology, etc. The approach to infrastructure and shared cost funding may differ by Partner agencies. As a result, discussion among OSCC Required Partners at the state level outlined examples and the parameters that each state agency/Partner supports and encourages for their local representative on the MOU under which local negotiations with respect to infrastructure and shared costs will occur.

Below are examples of the ways in which each Required Partner and the Workforce Development Boards are encouraged to discuss and plan for in a region. The state partners encourage the local Partners to put forward their best thinking that translates into integrated and coordinated services that best meet the need of a particular customer group. The information and ideas below were provided by each of the state agencies to include in the joint policy. All local Partners are encouraged to discuss these options when discussing integrated service delivery strategies and customer flow:

### **Department of Career Services (DCS)**

Discussions related to integrated service delivery strategies and customer flow must be based on the seamless delivery of multiple services to youth, job seekers, and businesses. Operations Managers and other DCS representatives must consider the individual service needs of shared customers and business customers as well as how access to Partner services will be coordinated. Service coordination should be guided by the required Career Center services as outlined in [MassWorkforce Issuance 100 DCS 08.104: Career Services Under the Workforce Innovation and Opportunity Act.](#)

The Department of Career Services provides shared costs through allocations of funds and or co-located staff to assist local areas to carry out the provision of the services identified above as well as infrastructure/overhead costs for these



services. Local Boards should determine staffing levels and infrastructure costs through the local MOU development process.

### **Department of Unemployment Assistance (DUA)**

The Unemployment Insurance (UI) program provides temporary income assistance to Massachusetts workers who are unemployed through no fault of their own and who are able to work, available for work and looking for a job. Career Centers play a vital role ensuring UI claimants are successfully preparing for and securing re-employment. Local Boards along with One-Stop Career Center Required Partners should ensure that the re-employment goals of the UI claimants are embedded within its job seeker/customer flow strategy.

This design should cover the fundamental requirements of the UI/ES partnership, including but not limited to:

- Introduction to Career Center Information;
- Re-Employment Services Eligibility Assessments (RESEA);
- Re-employment services, including career readiness;
- Completion of a Job Profile;
- Provision of Labor Market Information (LMI);
- Referral to Training Services, if applicable;
- Assessment for and, if applicable, follow-up information regarding the Training Opportunities Program (Section 30); and
- A strong incorporation of online tools to ensure, whenever practical, that UI mandated Career Center visits focus on career center services, rather than introductory information and assessments.

The Workforce Innovation and Opportunity Act require that Career Centers provide information and meaningful assistance to customers filing a claim for unemployment compensation.

To assist Local Boards in guiding this service delivery strategy please note that WIOA defines “meaningful assistance” as providing assistance using “staff well-trained in UI claims filing and claimant rights and responsibilities, available in the One-Stop centers to provide UI Claim filing assistance, if requested” or if needed due to barriers to access (LEP, disabilities, etc.); or providing assistance by phone or via other technology, as long as the assistance is provided by trained and available staff within a reasonable time.

The Departments of Unemployment Assistance and Career Services provide shared cost through allocations of funds and/or co-located staff to assist local areas to carry-out the provisions of the services identified above as well as infrastructure overhead costs for these services. Local Boards, in conjunction with Partners, including DUA, should determine staffing levels and infrastructure costs through the local MOU development process. DUA supports continued

increases in the leveraging of technology to deliver WIOA and UI services, in collaboration with Local Boards.

DUA staff will work in partnership with the Local Boards to ensure that reemployment services are provided to UI Claimants for whom such services are required as a condition for receipt of UI benefits. The services provided must be appropriate to the needs of UI claimants who are referred to reemployment services under any Federal or State UI law. DUA supports funding components for RESEA and other funds which allow for funding on both a usage and successful performance basis.

Access to re-employment services will be made available through the One-Stop career center and will include:

- UI eligibility services;
- Administration of the work test;
- Eligibility assessments;
- UI Claimant registration for employment services;
- Assistance in finding a job;
- Placement services;
- Referring UI Claimants to, and providing assistance for training education resources and programs including assistance under Title IV of the Higher Education Act, the Montgomery GI Bill, Post – 9/11 GI Bill, and other Veterans Educational Assistance, training provided for youth, and adult and dislocated workers, as well as other employment training programs under WIOA, and for Vocational Rehabilitation Services under Title I of the Rehabilitation Act of 1973.

DUA staff will contribute to an integrated service delivery strategy at the OSCC in the following ways:

- DUA will ensure that OSCC staffs are trained in UI to allow staff to assist claimants in navigating the process.
- DUA staff may co-locate at selected OSCCs.
- Allow OSCC staff to assist UI claimants in applying for UI benefits by navigating the UI online application.
- Ensure OSCC visitors have access to “meaningful assistance” from UI staff in order to resolve issues and questions related to their claim.
- UI Staff will support OSCCs with administration of the required RESEA services.

### **Massachusetts Rehabilitation Commission (MRC)**

MRC Area Directors will, when negotiating a joint partner local umbrella MOU, agree to work together with local partners to ensure Massachusetts meets the requirements of the Workforce Innovation and Opportunity Act in ensuring that Massachusetts residents, who are individuals with disabilities, have increased

access to and measurable outcomes in the areas of training/credentialing and employment.

A. The Massachusetts Rehabilitation Commission will:

- Ensure continued MRC staff representation on state and local Workforce Development Boards (WDBs), including membership on sub-committees of the WDB;
- Maintain regular communication and interaction via face to face meetings at the career centers and MRC, and via email and/or telephone to ensure collaboration in the development of strategies to support career pathways for individuals with disabilities, including students and youth with disabilities, to enter and retain employment and to support appropriate cross agency referrals;
- Work collaboratively to identify consumers with disabilities who are appropriate for job driven training and employment opportunities offered by workforce development/career centers;
- Work with One-Stop Career Centers to ensure access to career center space for information sessions, meetings with potential or shared consumers and “job driven” training initiatives, as appropriate;
- Provide annual input and feedback as part of the process of the required assessment of physical and programmatic access of One-Stop Career Centers for people with disabilities

B. Provision of Massachusetts Rehabilitation Commission (MRC) Services

The MRC provides specialized vocational rehabilitation services consistent with collaboratively developed Individualized Plans of Employment (IPE), approved by qualified vocational rehabilitation counselors employed by the MRC, to individuals with significant disabilities who have been determined eligible. As such MRC will work with WIOA partner agencies for referral for MRC services and vice versa.

C. List of Services

The following is a general list of services available to individuals with disabilities who are determined to be eligible for MRC Vocational Rehabilitation Services.

- Vocational counseling, guidance and job placement assistance.
- Vocational training, including college training necessary to obtain entry-level employment.
- Rehabilitation Technology services.
- Vehicle Modification and Adaptive Housing services.
- Job coach and on-the-job training services.
- Assistance in developing a Plan for Achieving Self Support for SSI recipients.
- Vocational and Community Integrated Employment Services including vocational evaluation and assessment, skills training, job driven training, job placement, job support services and initial employment services, including job coaching.
- Physical and Mental Restoration services including provision of medical treatment and medical aids and devices.

- Occupational Licenses, tools and initial stocks and supplies for work.
  - Assessment and support services needed in conjunction with the Individual Plan for Employment (IPE).
  - Benefits Counseling.
  - Supported Employment.
- D. Considerations in providing Vocational Rehabilitation funding for services:
- Eligible individuals must be persons with the “most significant disabilities” for any services to be provided to them according to the current MRC Order of Selection. Periodically, purchased services are subject to a waiting list. Other eligible individuals may receive information and referral services only.
  - The family and consumer participate in paying for services based on Financial Need determination.
  - The MRC Vocational Rehabilitation Program first uses comparable benefits to fund services such as MassHealth, health insurance, college Pell Grants and available services from other agencies for which the individual is eligible.
- E. Organizational Requirements:
- The determination of eligibility for MRC services, development and approval of IPE’s, approval and authorization of the purchase of vocational rehabilitation services, can only be performed by qualified vocational professionals, as defined in the Act, employed by the MRC.
  - The supervision of MRC staff may only be performed by qualified supervisory staff, as defined in the Act, employed by MRC.
  - The budgeting, allocation and expenditures of MRC funds must only be performed by management and supervisory personnel employed by the MRC.
  - The Commissioner of MRC must be directly and solely responsible for the management and operation of the MRC.

F. Universal Access/Accessibility

The MRC shall not participate in any aspect of the Local Development System that does not provide for the equal, effective and meaningful participation by individuals with disabilities. However, MRC will provide expertise and advice to the local workforce partners regarding reasonable accommodations and accessibility.

The Massachusetts Rehabilitation Commission has identified local representatives to enter into discussions with regard to integrated services that meet the needs of the shared customers in the OSCCs.

Representatives will participate as members of each area’s local MOU Team. Local conversations will culminate in a vision for shared customer flow and provision of services to shared customers and appropriate related operating costs including both shared and infrastructure costs.

The local plan of service and associated costs will be reviewed by the MRC Central Office for approval before inclusion in the MOU to ensure that costs are reasonable, allocable, allowable and necessary for the provision of agreed-upon services.

### **Massachusetts Commission for the Blind (MCB)**

MCB Regional Directors will work in partnership with the Local Workforce Boards to support the needs of legally blind and visually impaired consumers who seek career center services through the One-Stop Career Centers (OSCCs). Access to MCB programs, services, and resources will be made available at all OSCCs. Local areas will determine how MCB programs and services are accessed through the OSCCs based on the volume of customers and the availability of MCB staff. Legally Blind and visually impaired or consumers will receive access to MCB services at the OSCCs in one or more of the following ways:

- Based on need, MCB staff will be physically present at the OSCC to provide services.
- OSCC staff will be appropriately trained to provide information to legally blind and visually impaired consumers about programs, services, and activities available through MCB.
- OSCC staff will make a direct link between the legally blind and visually impaired consumer and MCB staff to schedule an appointment, or to receive useful information about programs and services.

MCB will support an integrated service delivery strategy in which OSCC staff will provide career center services to legally blind and visually impaired customers by:

- Assisting the Local Boards with training OSCC staff to use assistive technology with visually impaired or legally blind consumers who seek career center services.
- Providing training to OSCC staff on accessibility requirements for legally blind and visually impaired consumers.
- Assisting with accommodations related to workshops for legally blind and visually impaired consumers.
- Providing training to OSCC staff so that staff have basic knowledge of programs, services, and resources available through MCB.
- Ensuring that MCB Employment Services Representatives and OSCC Business Service Representatives collaborate so that legally blind and visually impaired consumers receive appropriate job matching by reviewing

consumers skills, communicating employer qualifications and organization culture, and sharing employer contacts.

- Providing sensitivity training to OSCC staff.

The Massachusetts Commission for the Blind has identified local representatives to enter into discussions with regard to integrated services that meet the needs of the shared customers in the OSCCs.

Representatives will participate as members of each area's local MOU Team. Local conversations will culminate in a vision for shared customer flow and provision of services to shared customers and appropriate related operating costs including both shared and infrastructure costs.

The local plan of service and associated costs will be reviewed by the MCB Central Office to ensure that costs are reasonable, allowable and necessary for the provision of agreed-upon services to shared consumers.

### **Adult Community Learning Services (ACLS)**

Adult and Community Learning Services (ACLS) ensures meaningful access to Adult Basic Education (ABE) services through One-Stop Career Centers (OSCCs) by funding outstationing services in all 16 workforce areas.

The role of ABE outstationed staff is to serve as liaisons between regional ABE programs and local OSCCs. The outstationed staff is expected to:

- schedule and maintain posted hours at their assigned OSCC
- develop and monitor two-way referral systems, processes, and procedures with OSCC staff
- maintain accurate records of customer intakes, assessments, referrals, and other services provided
- connect eligible ABE students looking for employment or training to OSCCs
- be available by phone or email on days when not on site
- schedule appointments for OSCC customers seeking ABE services on the day(s) ABE outstationed staff are on-site
- train OSCC staff on ABE program intake, assessment, and referral procedures
- take OSCC walk-in customers and phone calls when on-site
- disseminate information about OSCC services to regional ABE programs (e.g. making presentations at ABE programs, organizing informational trips to OSCCs, hosting webinars, or emailing information to ABE programs about OSCC events and services)
- provide accurate and comprehensive information about OSCC services
- keep current with all OSCC services.

The purpose of shared services is to provide easier access to ABE for OSCC customers. Similarly, ABE students who have acquired the necessary basic skills can benefit from OSCC services. Two examples that support shared services are outstationing and co-

location of services. Examples of co-location are offering ABE or ESOL class at the OSCC or having regular OSCC services available at the ABE program.

In many works force areas, ABE and OSCC staff jointly present on OSCC services at ABE programs, sometimes at night when many ABE classes are in session since many ABE students work during the day and cannot attend events scheduled during regular business hours at OSCC.

ACLS shared costs can be through allocation of funds, co-location of staff to assist local areas in carrying out the provisions of the services identified above, and/or non-cash and in-kind shared services negotiated at the local level to ensure that ABE and OSCC services benefit shared customers. In addition, ACLS currently provides in-kind support in the form of ABE staff out stationed at OSCCs in all sixteen workforce areas.

WIOA caps ABE cash contribution to OSCC infrastructure at 1.5% of its federal allocation (depending on federal allocation for Title II, approximately \$150,000 for FY18) to the OSCC system. ACLS will determine how these funds will be distributed to each region based on the relative benefits received by ABE customers in each of the state's 16 workforce areas, as well as adhere to the Title II authorizing statute and the Federal cost principles requiring that costs are reasonable, necessary, and allocable (criteria for the distribution TBD). These dollars will be reserved at the state level for distribution through an ISA with EOLWD.

### **Department of Transitional Assistance (DTA)**

The Department of Transitional Assistance (DTA) and its local designees will work in partnership with the Local Workforce Development Boards to maximize the opportunity for DTA clients<sup>1</sup> to obtain workforce development, education, and supportive services through the One-Stop career centers (OSCCs) that will enable them to move towards employment and longer term economic self-sufficiency.

Access to information on DTA programs, services, and resources will be made available at the OSCCs. Local areas will determine how DTA programs and services are accessed through the OSCCs based on the volume of customers, the needs of the local catchment area and the availability of DTA staff.

Strategies for providing access to DTA information at the OSCC may include but not be limited:

- DTA staff will be physically present at the OSCC to provide services.
- OSCC staff will be trained to respond to and/or make referrals for current or potentially eligible DTA clients about programs, services, and resources available through DTA.

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<sup>1</sup> This includes those receiving assistance through Temporary Assistance to Families with Dependent Children (TAFDC) and/or the Supplemental Nutrition Assistance Program (SNAP).

- DTA will collaborate and support an integrated service delivery strategy in which OSCC staff will provide career center services to DTA clients by:
  - Providing training to OSCC staff on the eligibility, work participation and other requirements of the TAFDC and SNAP Programs.
  - Providing training to OSCC staff so that they are knowledgeable of the services and resources provided by DTA and its community partners.
  - Working jointly to address key challenges for TAFDC and SNAP clients to participate in OSCCs activities and resources such as transportation, child care and/or others identified by the client.
  - Assisting in conducting workshops for DTA clients.
  - Making appropriate referrals to the OSCC to ensure that DTA clients become shared customers with the workforce system and obtain the related services they need.
  - Working jointly to ensure that TAFDC and SNAP clients receive appropriate employment supports, training opportunities, coaching and “on the job” follow-up.
  - Working jointly to ensure that TAFDC and SNAP clients receive appropriate job matching by sharing information on client goals, strengths and challenges.

Each local DTA office (“Transitional Assistance Office” or TAO) will establish a protocol and procedure for making referrals to their identified OSCC. Each TAO will also identify a liaison to work in partnership with the OSCC.

The Massachusetts Department of Transitional Assistance has identified local representatives as members of each area’s local MOU Team to enter into discussions with regard to integrated services that meet the needs of the shared customers in the OSCCs. At this phase of implementation, local and regional collaborations should be focused on integration and coordination of existing information, staff, resources and services. Local DTA staff should work in partnership with the Local Workforce Board, the OSCC and other community partners to envision, design and develop a streamlined and easily accessed local/regional array of employment supports, training opportunities and job placement assistance. Discussions regarding the allocation or reallocation of resources (TANF, SNAP, and/or Employment Support Services) for infrastructure or other needs will continue to occur at the state level. When available, further guidance regarding resources and funding for FY2018 and beyond will be provided.

### **Senior Community Service Employment Program (SCSEP)**

**Common goal:** When acting in their capacity as an OSCC Required Partner, MA-SCSEP sub grantees must collaborate with One-Stop Career Centers (OSCC) to maximize opportunities for participants to obtain workforce development, education, and supportive services to help them move into unsubsidized employment. MA-SCSEP sub grantees are required to serve as a proactive liaison between the SCSEP system and the One-Stop Career Centers (OSCC) in their service areas.



**Co-location:** MA-SCSEP sub grantees must continue to have a staff person at the OSCCs for a set number of hours per week to provide SCSEP program information or services to customers. Staff must regularly schedule and maintain posted hours at their assigned OSCC, develop and monitor processes and procedures with OSCC staff and the SCSEP programs in the region of how customers will be identified and referred to SCSEP, and maintain accurate records of customer intakes, assessments, IEPs, community services assignments, referrals, and other services provided.

**Shared Customer:** In addition to providing basic career services, SCSEP grantees and sub-recipients must make arrangements through the One-Stop delivery system to provide eligible and ineligible individuals with referrals to WIOA intensive and training services and access to other activities and programs carried out by other One-Stop Partners. MA-SCSEP sub grantees are required to connect SCSEP individuals looking for employment or training to OSCCs to ensure they become shared customers with the workforce system and obtain the related services they need.

**Collaboration with the Nationals:** SCSEP sub grantees must also collaborate with the National SCSEP Grantees and Sub grantees. This collaboration may be in the format of cross-training of front line staff, joint job fairs and informational sessions, and provide two-way referrals to the program with the shortest waiting list.

**Shared cost:** Shared costs can be through allocation of funds, co-location of staff to assist local areas in carrying out the services identified above, and/or non-cash and in kind shared services negotiated at the local level to ensure that MA-SCSEP and OSCC services benefit shared customers. The Administrative costs, as specified in the 20 CFR Part 641 § 641.856, of the SCSEP federal funds may be used for the shared infrastructure costs. Programmatic activity costs, as defined in 20 CFR Part 641 § 641.864, of the SCSEP federal funds may be used in the shared costs.

## **XII. MOU PLANNING ACTIVITY TIMELINE**

Suggested time line for planning activities related to the development of the Umbrella MOU.

Planning Activities	Time Line
Develop strategy for local MOU planning team <ul style="list-style-type: none"> <li>• Share LMI for planning and decision making</li> <li>• Identify and describe data on priority populations</li> </ul>	November – December 2016
Identify <u>shared</u> customers	December – January
WIOA Statewide Convening on MOUs Convene teams/build collaboration, discuss issues, learn about examples of integrated services, etc.	December 6 <sup>th</sup> 2016

Career Pathway Planning for Priority Populations: UI claimants, individuals with disabilities, youth, low-income adults, older workers, Veterans, etc.	January – April 2017
Development of Business Service Models	January – April 2017
Identification of Customer Centered Design	January – April 2017
Describe how customers and businesses will access technology and materials (in-person/virtual)	January – April 2017
Describe referral process to Partners	January – April 2017
Training across Partner programs	January – April 2017
Discussion of data sharing and outcome reporting across partners	April – May 2017
Identify infrastructure and shared costs across programs (in conjunction with FY18 planning)	April – May 2017
Final Signatures	June 2017

\*See page 5, section B *Memorandum of Understanding Content* for a description of the planning activities listed above.

### **XIII. AMENDMENTS TO THE MOU**

- A.** The MOU may be modified by mutual agreement of the WIOA Required Partners and the Local Workforce Development Board (example: funding changes). Any such modification will be preceded by a 30-day written notice to all partners of the intent to modify this agreement, the purpose of such modification, and the Workforce Development Board meeting at which the modification will be discussed.
- B.** Any individual party to the umbrella MOU may request a modification to the agreement by making such request in writing to the Board Chair. If such a request affects any other party to the agreement, the Board will provide notification to the other parties.
- C.** The MOU may be modified at any time to include additional One-Stop Career Center partners (mandatory or non-required) who will sign the agreement and appropriate attachments at the time they are being added. All parties to the umbrella MOU will be notified in writing of the intention to add parties to the agreement.
- D.** If a Required WIOA Partner appeal to the State regarding infrastructure costs results in a change to the One-Stop partners infrastructure cost contributions, the MOU must be updated to reflect the final One-Stop partner infrastructure contributions [WIOA §678.500(e)].