SCSEP Grantee Orientation Day One Transcript

Burnett, Lauren S - ETA CTR 0:03
And you are currently muted. If you agree to being recorded at this time, you may turn on your camera, at which time the agreement prompt will pop up on your screen where you can accept.
So I'll give you all a moment to do that. If you've unmuted yourself, please re-mute.

Burnett, Lauren S - ETA CTR 0:24
This meeting is now being recorded. At the conclusion of the SCSEP Grantee Orientation, all recordings will be available on the CoP. Our Q&A will be at the end of each presentation. Should you have any questions, please don't hesitate to type them in the chat and they will be addressed in the order it is received. When adding your question to the chat, please add the grantee of whom you represent as well.
To ensure that everyone can participate fully in today's SCSEP Grantee Orientation, we would like to share a few captioning tips. Live captioning must be enabled individually by doing the following. Select the three dots located between the apps and camera buttons. From the drop down, select language and speech. Under language and speech, select show life captions. When enabled, you will see a disclaimer: captions will be shown in English.
One last reminder. We kindly ask that you keep your microphones muted throughout today's meeting to ensure a seamless experience for our moderators.
So once again, welcome to day one of our SCSEP Grantee Orientation.

Wilson, Toni K - SCSEP 1:40
Alright, well welcome SCSEP.
I'm so glad that everyone is here today.
For those who haven't met me, my name is Toni Wilson. I'm the one here waving, in I don't know if this is orange or red, and I am the unit chief for the Senior Community Service Employment Program known as SCSEP, and I want to get us started with our division chief. Division of National Programs, Tools and Technical Assistance is my pleasure to welcome Steve Rietzke.

Rietzke, Steven - ETA 2:19
Thank you, Toni.

Wilson, Toni K - SCSEP 2:20
All right, before we jump in, Steve, we're gonna make sure if we could just remind

people to please mute.
And our tech people will make sure that gets settled.

Rietzke, Steven - ETA 2:31
Thanks Toni.

Wilson, Toni K - SCSEP 2:32
Alright, thank you so much, Steve.

Rietzke, Steven - ETA 2:34
Yeah. Well, thank you, Toni, for that introduction and welcome to all of you.
Thank you for joining us today.
I'm excited that I can join Toni in welcoming you all to our grantee orientation.
You know you all are the 2024 SCSEP grant class, so it's great to see the national grantees and the set aside, grantees here.
Congratulations again on all the work that it took to go through the competition in 2024.
Welcome to the state grantees. It's great to see you all here and thanks to you all for the work that you put into the state planning process this year. So, you know, we're really kind of at the beginning of this 2024 to 2027 grant cycle. It's great to see a lot of familiar names and in the attendee list a few faces. I wish I could see all your faces in front of me, but we'll settle for the Teams window.
I also want to just give a shout out to my boss, Heidi Costa, our Associate Administrator in the Office of Workforce Investment, who's joining to say hello or to wave hello to you all. I won't put her on the spot, but she wanted to join as well to see you all and I suppose I should have started with this.
I'm Steve Rietzke. I'm the division chief for national programs, tools and technical assistance in the Office of Workforce Investment and ETA's National Office.
We call our division DNPTTA for short. And as Toni said, she leads one of the units in our division that manages SCSEP. You know, we really appreciate all the work that you all do for America's older workers. I'm really enjoying seeing your thoughts in the chat about what your favorite part about SCSEP is. So much great work in the way that you're working with older workers, the outcomes that you're helping them to achieve, the presence that you have in the community and the work that you do with host agencies. So, thank you all for the work that you're doing. The work that you will continue to do as you as you work through your SCSEP grant in this cycle.
I also wanna say thanks to the SCSEP team here. Toni and her team, the team at TwoTech, the team at BCT Partners. Definitely a lot of really great effort that our team is putting in to making this a good session for you all. And I'll tell you that they really share

the passion that you all have for achieving strong outcomes for the older workers that you're serving so thanks to the team for all the work that you've put into this session. And you know, I really hope that everyone gets a lot out of it.

I think that, you know, we're calling this an orientation. Some of you probably been around SCSEP a long time and might be thinking, oh I don't need an orientation, but I think whether you've been with SCSEP a long time, whether you're just joining a grantee that's returning or maybe you and your organization are brand new to SCSEP, I think the sessions over the next few days are going to be a good refresher for folks who already have a lot of SCSEP experience and a good introduction or orientation to a lot of material that'll be great for folks who are newer. I also want to recognize right up front. I know that we're coming to you with this session at a time of change, right? Obviously, we had a change in administration about a week ago.

And so, you know, we are kind of working through some of those changes at the federal level. I know that there have been a number of policy announcements over the past week or so. I know that you all have questions about those things. I guess my caveat right up front for this session and over the next couple days is that we just don't have additional guidance on those announcements yet, right. So, I know that a couple of the big ones were the TEN, the training employment notice 21-24 that requires grantees to cease DEIA specific activities as well as the OMB that you may have seen in the news last night, regarding pauses or delays in federal grant funding.

Again, I know that you all have more detailed questions on those items. We're certainly happy to accept those questions, but at this point, we're definitely working on additional guidance related to those and we're just not at a point where we're going to be able to answer those specific questions right now.

So I thank you for your patience in that vein. Like I said, I think we want to hear your concerns, but in terms of when we'll be able to provide more specific guidance, it won't be right now. So, thank you for your patience there. But otherwise, what we're really hoping to cover here is a lot of great material about some of the basics of SCSEP. Some good tips and tricks. You know, I probably don't have to tell you that SCSEP has a lot of insurance and outs, a lot of different requirements, a lot of parameters that are in the statute that you have to follow and really, our team here, we want to do our best to help you do your best. We're really invested in the success of you all as grantees and we want to do whatever we can to be helpful to you in understanding both how to comply with federal requirements and understanding like, what are your peers doing? What are some of the best practices? What's some of the research out there? In terms of services to older workers in terms of sector-based training strategies, things like that. So we won't cover every last thing in the next three days, but you know, as the team will tell you and elaborate on more, our job in the National Office and out in the regions is

really to help you be the best you can be, in terms of your work as a SCSEP grantee and to get the best outcomes that we can for the older workers that you're serving. So, thank you again for being here.
We're excited to hear about the great work that you're doing. I know there's a lot of exciting work happening in the digital literacy space in that sector-based space. We're excited about connecting up our performance system with the WIPS system and excited that it's the 60th anniversary of the Older Americans Act this year.
So I really hope that you all have a great virtual conference this week and we look forward to working with you over the course of this grant cycle.
Toni, I'll hand it back to you.

Wilson, Toni K - SCSEP 10:48
Alright, thank you so much, Steve.
We really appreciate you.
We appreciate the partnership work that you do with SCSEP, so thank you again.
All right, everyone.
So let's get started.
Next slide please.
Before we go over today's agenda, I do want to just kind of set the tone for the next three days. I do want to flag that this is virtual. We did do this based on kind of an abbreviated version of what you usually would do if we were all in person for a week.
We're going to kind of make sure that people at least leave with some foundational information and any updates, and we will follow up with a few recorded deep dive recordings on specific items, that'll walk you through. This will give you an opportunity to have something that you can share with any new staff that come in or can share with your subcontractors. So, we'll be providing that information after our conference. We also have a SCSEP core monitoring supplement guide that we will be talking about a little later, but that is an opportunity to see a lot of the questions that you have. It'll have some answers in there also where you can find the citation and some tips, so we'll be sharing that, it'll be in the chat. It will also be on our CoP, and we'll be sharing all of the materials that you see, the PowerPoints et cetera will be shared after the conference. So, for those that are concerned in reference to notes, et cetera, that information will also be included, and we'll have a transcript of this. That's part of our recording this and so this will be posted. So once again in, it is going to be a resource that you use to share with staff that you might want to help with trainings on different pieces. So, we're trying to do as much as knowing that we need to capture this moment, but that the training needs to expand and go forward.
So we're trying to balance both. So, I just wanted to flag that we are also, and I'll get into

day one, but just wanted to flag that, in kind of a nutshell for day one, going to be focusing on some general information around the program. Program interview would be doing a little bit of history and background. Some of the objectives give you a chance to see who are the structure and staff. Each section will have Q&A, so we do ask people to put questions in the chat. We'll have an opportunity to answer questions and at the end of the day, we'll also have an opportunity to ask some questions and where we're not able to answer questions, we will be following up with an FAQ that will go with this. So, if it's something that we're not able to get into a deep dive right now, we'll be sure to follow up. So please put your questions in the chat. Also, our goal is if we are limited to meeting in person, I would rather have it in person, doing peer-to-peer things versus kind of this general us talking to you. So, our goal is to have some peer to peers in the future. Hopefully we might be able to do those in person. So, as we are putting those together, some of the things that we've been hearing about is working with sub grantees. Some just in reference to the state, some just within reference to the national ways that States and nationals can work together, recruitment So there's been numerous things, but we asked throughout, if you have a peer-to-peer idea, you can just put peer-to-peer idea and you can put that in the chat. Collecting those also, we want to kind of get a sense of what peer to peers you guys would be interested in as we pull those together. At minimum, we release do those virtually in a way that we can all interact with each other. As I said, we're trying to see if we can possibly do that in person. So just wanted to flag that aspect of it. Excuse me. So, day one, as I described in day two, we're going to get mainly into all of the. I'm so sorry. I need to drink something. I apologize. Day 2 we'll get into things such as all of your optional policies and ATSS and things of that sort we'll be getting into that, and we'll also do a little work in reference to the resources that are available to you. And then on day three, we'll give a little update in reference to the state of GPMS and then we'll focus in reference to performance and making sure everybody's on the same page of all of our performance things and what they mean and have that foundational information. This will not be a GPMS training. So just so you're aware of that and in that case, not everybody on this call, will we know that that kind of expands on who you need training for? So, we will be following up with specific trainings both on the GPMS system and also for those that are in the demo, those nine grantees. There'll be a set of training for that, so just wanted to flag those pieces and just kind of set the foundation for the day. So, with that, we'll jump in today's agenda. We've already done our welcomes and introductions. And I will be passing it over to Byron in just a second. He's going to be getting into an intro on SCSEP, little bit of a program interview. We're going to touch base and reference to some history and background.

Some key objectives and goals of the SCSEP program and then the Q&A and please

before I pass it over to Byron, we are aware that this is a little longer than like our average calls or webinar. So, we have added a break in there. So, kind of halfway through, we'll do like a 15-minute break so everybody can get up and get water, which is clearly what I need. So, everyone can get some and then we'll continue.
Our plan is to end by 4. If we end a little early, I know everyone has a lot going on in their programs, but just wanted to kind of flag that that is the plan for the day. So, with that said, next slide please, I am going to pass it over to Byron Kline who is one of our workforce analysts here at the SCSEP program, Byron.

Kline, Byron - ETA 17:46
Great. Thank you, Toni.
It's great to be with you all.
I'm Byron Kline, National Office Liaison with regions two, three and six. I'll talk more about that in a minute, but it is great to be here with you. I'm going to start off with some basics of SCSEP. As Steve mentioned earlier, we have a lot of new folks who are just beginning their roles with SCSEP, so please indulge us if we go over some things that you already know. Let's kick things off with starting with the DOL regions. As you know, DOL divides the country and territories into regional offices. Each region has a national office liaison. For example, I said I'm the NOL, National Office Liaison for two, three and six. My colleague Irene Adams serves as the National Office Liaison for Regions one, four and five.
Next slide please.
So to date, there are 20 national grantees and 56 grantees from the US States and Territories. That's a total of 76 SCSEP grantees altogether.
Next slide.
This slide shows the relationship between the Department of Labor, including DOL's Employment and Training Administration, otherwise known as ETA, the Office of Grants Management, OGM, the Office of Workforce Investment, OWI, and lastly the Chief Evaluation office. Each of these offices and divisions work closely with your federal project officers, along with the Grant Officer. And last but not least, the national program office team, that's us. Collectively, we work together to support you, the grantee.
Next slide, please.
So you heard us talked about DNPTTA, the mission of the Division of National Programs, Tools and Technical assistance is to contribute to the implementation of an integrated national workforce investment system. That system provides workers with the job, search, assistance and information on labor markets, on occupations, on careers and on supportive services, that folks need to get and keep good jobs that deliver

employment or I'm sorry, the program that delivers employment and training services to targeted population and that improves the workforce systems capacity to deliver integrated high quality programs to job seekers and employers.
Like next slide please.
The older workers unit manages and oversees SCSEP grants. We review program and performance data on an ongoing basis through GPMS, and we continuously look to grow our capacity to deliver services to older workers.
Next slide please.
So now our introduction to the Older Workers unit and our national office team.
Next slide.
So you've already met Toni Wilson, our fearless leader of the SCSEP unit. Next part of the team are the SCSEP workforce analysts. You have Irene Adams, you have Ali Slaughter, who is our development specialist, she focuses on all things performance. We have our newest member of the team Shawnte McGee and myself, Byron Kline.
Next slide please.
So the SCSEP National office team has six primary roles, one, to support the federal project officers, two, to provide guidance on SCSEP policies, three, to facilitate technical assistance to our grantees, and four, provide training to grantees as well, five, to collect data via GPMS, and last to review grant optional special requests.
Later on this morning and in the coming days, my colleague Ali Slaughter will do a deeper dive on performance data and Irene Adams and Michi McNeace will have more to say about OSR's, or Optional Special Requests.
Next slide please.
So the role of the FPO is to be your first point of contact and assistance for all grant related matters. They provide assistance with programming policy compliance, and they conduct oversight and review of grant performance via their monitoring function. Lastly, FPO's sometimes play a role in both facilitating and, in some cases, delivering technical assistance.
Next slide.
So for SCSEP, our TA providers are TwoTech incorporated. Michi McNeace, serves as our project lead to TwoTech, is responsible for providing TA trainings to the SCSEP community as a whole, and in some instances targeted TA to individual grantees.
We are very grateful for TwoTech's wealth of knowledge and leadership.
Next slide.
And we also work closely with BCT partners who are responsible for the ongoing implementation of the grantee performance management system, also known as GPMS, along with their partner organization, Mathematica and the Charter Oak group. Together they support all our performance, data collection and reporting functions.

Once again, we are grateful for BCT's leadership and support along with their partners at Mathematica and the Charter Oak Group.
Next slide, please.
So as a recap, we, the National Program office team, we oversee SCSEP as part of DNPTTA. We support the FPO's, we provide TA we collect your performance data and along with our tier providers we provide overall clarification and guidance on all SCSEP policy.
Next slide.
So the SCSEP unit support for FPO includes reviewing grant submissions and modifications along with TA and training together with our SCSEP contractors BCT and TwoTech.
Next slide.
The units managing and collecting performance data involve several reporting tools and documents, including the quarterly performance and narrative reports, also known as QPR's and the QNR's. Our customer satisfaction surveys and much, much more. Again, Ali slaughter and Ron Scheck will delve into that a little later. Lastly, our policy guidance is governed by federal regulations, Funding Opportunity Announcements or the FOA's, along with TEGL's and TEN's.
Next slide.
So you've seen this slide already, but I just want to recap all of these entities that make up DOL. All work closely with the FPO, the grant office and the program office to support you, the SCSEP grantee.
Next slide please.
Ok, so now I wanna talk about the purpose of SCSEP and let's start at the beginning with the funding opportunity.
This funding opportunity for SCSEP now solicits applications for SCSEP national grants for the four-year cycle, beginning with program year 2024. Notably, SCSEP is the only federally sponsored employment and training program that specifically targets low-income older individuals who seek to enter or reenter the workforce.
Program participants receive paid work experience at local public or nonprofit agencies for approximately 20 hours a week, while in community service assignments and other training activities. Our participants gain valuable work experience, providing assistance to community-based organizations, and in turn, employers benefit from an expanded pool of experience, dependable workers in their local regional economies. The dual goals of the SCSEP program, and this is very important, are to promote youthful opportunities through work, experience, training and community service activities, and to move SCSEP participants into unsubsidized employment.

Next slide.
So when we look at SCSEP's history, we start with its authorization under the Older Americans Act of 1965. SCSEP, as the employment program, is designed to foster individual economic self-sufficiency and to promote useful employment and training opportunities through community service training assignments for unemployed, low-income persons, particularly those who have poor employment prospects. That includes people who are age 55 or older, and the goal is to increase the number of persons who can and want to benefit from unsubsidized employment. SCSEP continues to provide important employment and training opportunities for low-income seniors to improve their employment outcomes and contribute to the overall enrichment of communities across the country. SCSEP provides various community assignments and job training opportunities at nonprofits and at public facilities. Over the years, SCSEP has enhanced their service to participants by providing occupational work skills and aptitude assessment, skills development and other job training opportunities and employment assistance through American Job Center. Program grants are awarded to eligible applicants, which include states, US territories and public and private nonprofit entities other than political parties. The relative amount of funding for each type of eligible applicant has historically occurred at proportions of 22% to state and territorial agencies and about 75% to national grantees.
OK, next slide.
So organizational definitions and just to be clear, these are the types of entities that are eligible for SCSEP, nonprofit organizations and nonprofit organization by definition, is an agency, institution or organization which is or is owned and operated by one or more corporations or associations of which no part of the net earnings and yours or may lawfully in your, to the benefit of any private shareholder. Federal public agencies must demonstrate that they have the statutory authority to receive other federal grants, also known as gift authority, and lastly, tribal organizations. These organizations that are recognized governing body of any Indian tribe or any legally established organization of Indians, which is controlled sanctions or chartered by such a governing body.
Next slide please.
So the intent for our SCSEP, is to fund projects that provide services to eligible SCSEP participants who have poor employment prospects. As we mentioned before, folks who would benefit from unsubsidized employment in the public or private sector and who are not job ready SCSEP eligible individuals, must meet the following conditions first, be age 55 or older. Second, have an income of no more than 125% of the federal poverty guidelines and third, be unemployed at the time of program enrollment.
Next slide.
Now this is key when selecting eligible individuals for participation in SCSEP. Grantees

and sub recipients must give priority to individuals who have one or more of the following characteristics. This is listed in 20 CFR 641.520. First priority are 65 or folks who are 65 of age or older. Folks who have limited English proficiency have low literacy skills, reside in rural areas. Our veterans or eligible spouses of veterans for purposes of the jobs for Veterans Act, folks who have low employment prospects, people who have failed to find employment after using services provided under the Workforce Innovation and Opportunity Act of 2014, otherwise known as WIOA, people who are homeless or at risk for homelessness, and this is the one that was most recently added to SCSEP in terms of our priority, are people who are formerly incarcerated individuals as defined by 20 C640-1140. We'll talk about that more later.

Next slide, please.

So if you were to boil down the SCSEP service delivery model, to an elevator pitch, you should remember these six takeaways. First, SCSEP is a community service work-based job training program for older Americans authorized by the Older Americans Act. Second, its target population are individuals 55 and older with a family income of no more than 125% of the federal poverty level. Third, participants in SCSEP gain work experience in a variety of community service activities at nonprofit and public facilities.

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Fourth, SCSEP provides 30 million community service hours. Fifth, participants work on average about 20 hours a week and last, SCSEP training is meant to serve as a bridge to unsubsidized employment opportunities for older workers.

Next slide.

So, a key part of the SCSEP service delivery model, as I mentioned are our essential partners. Let's start with the host agencies. Host agencies serve as the actual training worksite for our SCSEP participants. They work in coordination with WIOA agencies, including American job centers and local workforce development boards. Also, SCSEP coordinates with state entities like state departments of Health and Human services, is an administration for community living, along with other aging programs.

Next slide.

So here's a graphic representation of the SCSEP service delivery model. We look at each component, participant services, host agency partners, workforce and aging partnerships and employer engagement. We look at them separately and we're going to start with participant services.

Next slide.

So when it comes to participant services, the goal is to recruit and serve eligible low income, older adults from the targeted most in need in minority populations, whose individuals with whom have the greatest economic needs, pay wages and benefits as required by federal, state and local laws. SCSEP provides comprehensive services and

appropriate community service assignments that are related to the participants employment goals. SCSEP provides additional skill training that align with their employment goal and is documented in their IEP's, their Individual Employment Plans. We provide appropriate services through shared resources, if possible, that are necessary to enable participants to successfully participate in the program and retain employment. SCSEP coordinates with other aging and workforce partners. As I mentioned earlier, the goals provide additional referrals and related resources for participants. Lastly, SCSEP is designed to assist the participants in obtaining unsubsidized employment and adhere to the project duration requirements.
Next slide.
The next, host agencies like I mentioned, they are public or private, nonprofit organizations, 501 C3's. When grantees recruit host agencies, you should keep in mind this is where participants will receive their soft skills training and development. Host agencies should reflect current in demand, labor market industries. Host agencies must also provide a safe training environment and adhere to maintenance of effort requirements. Maintenance of effort just to be clear, this refers to the requirement placed upon federally funded grant programs that a recipient demonstrate that the level of funding for particular program, remains relatively constant from year to year.
Next slide.
So with respect to workforce and aging partnerships, we work in coordination with WIOA. SCSEP is required partners, so grantees need to be familiar with WIOA requirements in addition to the myriad of services that American job centers provide. AJC's can assist in SCSEP participant recruitment, working close in collaboration with workforce investment boards.
Next slide.
So here's a general list of Aging partnerships organizations I've mentioned. Department of Aging's Area Agency on Aging, Aging and Disability Resource Center and also advisory groups.
Next slide please.
Lastly, when we talk about employment engagement, this includes cultivating strong relationships with both local and national employers.
It means developing mutually beneficial partnerships where the employers have a clear understanding of what SCSEP is and what it isn't. Also important is creating on the job experiences for SCSEP participants that can lead to them directly hiring our people. And lastly, marketing SCSEP to employers in a way that gets them more involved with SCSEP participants.
Next slide.
So now I'm going to shift gears as we round out this beginning presentation to a key

resource for grantees. Our monitoring guide SCSEP supplement, otherwise known simply as a SCSEP supplement or the supplement. This tool was designed expressly for FPO's when they go out on monitoring visits. It directs them on what things to look for when monitoring grant programs in general but also SCSEP, specifically the core monitoring guide supplements are program specific monitoring guides that complement the CMG. The SCSEP Supplement identifies additional program specific compliance requirements along with additional instructions. Additional tips, questions and tools and resources which may be used to assess a SCSEP grant recipients progress and provide information about grants implementation or applicable program administrative regulations. Someone's gonna put a link in the chat to the actual supplement on this particular slide. The SCSEP supplement to the core monitoring guide is a link itself.
Next slide please.
So the supplement can appear sort of daunting at first. It's 187 pages of complex details about SCSEP grants and some general things about grants in general.
However, each topic area provides links to relevant regulations to relevant questions about SCSEP. All things that the grantees can use to assess their progress and prepare for SCSEP monitoring visits. There are tips for developing and adhering to policies practices and SCSEP procedures here. On this slide we listed a few select key topics, priority of service. The page numbers that are attached to them. Eligibility and enrollment, host agencies, partnerships, performance, reporting and again, we'll talk more about that later in data validation.
Next slide.
Here are just a few more key topics about budget modifications, sub recipient monitoring, staff positions, grievance and complaint systems and match policies and procedures. Again, all of these can be found there at those respective page numbers.
And lastly, our next slide please.
This is just an example of what a SCSEP supplement topic page may look like. There's again, a link to the supplement that now appears in Community of Practice, so feel free to take a look at it. The SCSEP National office team played an integral role in creating this supplement, so also feel free to ask any of us where to find the information and supplement, we almost know it by heart, all 187 pages, so we're happy to show it to you.
That's it for me.
I'm going to turn things back to Toni for any Q&A. Thank you.

Wilson, Toni K - SCSEP 39:39
Thank you so much Byron for that foundational information, definitely appreciate it.

Just before we jump into Q&A, I definitely want to underscore this document that is in the chat. It does include a lot of your very specific questions. We will be sending this out after the call, but between this, your FOA, your regs and our Community of Practice and then always your FPO, most, if not all of your questions should be able to be addressed. So just wanted to flag that information. So that's something that you know can be shared. Also, I know in reference to Q&A in the chat, we did get a few questions and reference slides. Just a reminder that we will be sending these out after the call. We have a whole section just on this conference and it'll include slides, materials, links, et cetera, that you will be able to quickly use for yourself or send out. So just wanted to flag that piece. Let's see. Is there any other questions that we can ask for today? I did want to note that maybe, unlike in the past, there is not going to be a deep dive in the financials on this. We'll be doing some recording. There are recordings that we'll share with your financial teams. So, for those that were thinking that you needed to have your financial staff on the call, they are welcome, but it will be high level. Most of their questions will be able to be answered in that core monitoring guide. So, I just wanted to flag that question.
Let's see.
Alright, I think for right now that's what we have outside of things we're gonna be talking about later in the slides. So, I will stop there once again before we move on to the next piece. If you do have questions, please put them in the chat. If we can't answer them immediately, we'll be having an FAQ. In addition to, as you're thinking through, if it sparks an area that you feel would be a great peer-to-peer, please put that as I said, note peer-to-peer ID and put that in the chat too 'cause we're collecting those, all right. Next slide.
Alright, so this is my pleasure again to introduce two great team members. We have TwoTech and Irene Adams and they're going to be talking to us in reference to the SCSEP grantee's responsibility and just understanding your grant obligation. I'm gonna pass it over to you, Michi. You're welcome, Michi.

McNeace, Meche - ETA CTR 42:38
Thank you, Toni.
Yeah. Thank you. Thank you. I must say that was a great introduction and overview of SCSEP. It left me a little bit intimidated by whether our session would be worthy enough to follow you all, but we're going to go ahead and try. I want to say good afternoon, everyone. My name is Michi McNeace, and my colleague Joyce Barcley will be co-presenting this session on SCSEP grantee responsibilities, understanding your grant obligations session today. So, during this session we will cover the vital responsibilities that will help you understand your grant obligations, which is of course, we all know,

paramount to the overall expectation and success of your grant. Next slide please.
Our intent is to cover some key areas related to the standard grant responsibility and administration. We also will touch on some SCSEP case management, which includes participant and host agency responsibilities.
Next slide please.
All right, so to get started, grantees responsibilities. Grantees, we know that navigating the world of SCSEP grants can feel a bit overwhelming at times, we would like to provide some noteworthy information to ensure you maximize your overall management of your grant by understanding your responsibilities. Even though we will not be doing a deep dive, we will provide some insight that can help unravel some of the mysteries of grant management. Each grantee who was awarded the SCSEP grantee, is ultimately responsible for the entire grant, whether you administer or have sub-recipients, you're the party responsible from the start of the award. So, with that being said, let us walk you through the grant responsibilities. So, program implementation. Grantees, you are responsible for implementing the program carrying out what is outlined in your grant agreement and the terms and conditions ensuring you adhere to the programmatic assurances as well. As you know, you've signed the programmatic assurances certifying that you will uphold them. The assurances, just like your grant agreement in your terms and conditions, is also legal and contractual obligation. So, achieving the program objectives and also developing and implementing strategies to meet the performance measures. Also, monitoring progress is very important in managing your grant. Let's move on to financial management. Also, very equally important. Grantees must be accountable for the funds you receive, and those funds are used effectively and efficiently to achieve the program goals. Compliance. Grantees must ensure that you, your team, and of course your sub-recipients all know and understand the applicable laws and regulations that govern SCSEP, and that your policies align with those requirements, and reporting it is important. It is very important to submit your reports to DOL on time and your report should reflect current reporting period data and financial information and grantees, you should always be prepared for audits and monitoring visits. So, in essence, adhering to your responsibilities is crucial for the overall success and operation of your program and will ensure that you fulfill the mission of providing meaningful employment and training opportunities for older adults.
Next slide, please.
So let's talk a little bit about program administration. The program administration includes all sub grantees as well. Strong program administration can be considered as a strong foundation upon your SCSEP program is built on. It assures that your program operates efficiently and effectively and in compliance with all relevant regulatory

requirements. Ultimately, maximizing its impact on the lives of participants you serve and then community in which you offer. Program staffing. Having a strong staffing structure, the ability to provide direct services to participants and being accessible to the community and potential and enroll applicants or participants all go into your service delivery model. Does your model ensure overall program coverage across your entire service areas? Will you bring it into compliance with equitable distribution? So, is your staffing model covering all the service areas that you are awarded under your grant, and will this also ensure that you meet your equitable distribution requirements? OK. And then facilities and resources basically assist.

Your boot on the ground team, your direct service team have space for participants to come and visit with them to receive additional training to meet with them to go over their IEP's, do assessment things of that nature. Do you have adequate resources to carry out what is noted in the scope of work? And let's talk a little bit about the policy and guidance. And of course, you need to have solid policies that the grant requires and that you apply those policies equitably across your graph.

This should also apply to your sub grantees. Your policy should align with your sub grantees policies. I'm sure you have heard from members of the program office who have always stated that the grantees policy should be applied across your grant, which means your sub grantee should apply the same policies across the board, but also knowing that there will be some tweaks due to the nature of your sub grantees organization requirements. So, this should be in addition to, and later on I believe, later on today, there will be more conversations about policies and things of that nature. So, system access. Grantees must ensure that they have appropriate systems in place to access the funding system. Also, the data management. Accessing gpms for all users and ensuring that user roles assigns are appropriate for those specific users.

Oh, next slide please.

Then there is a program management. Compliant with regulations, ensuring timely and accurate financial reporting, ensuring participant services are on track and meeting performance goals. As you all know, maintaining accurate records is extremely important and grantees should evaluate your program effectiveness by analyzing your program data, whether program or financial data. And using your internal findings to either course correct to ensure other program success, the overall program success.

Next slide please.

Program oversight. It is no different from program administration, but oversight is a day-to-day operation. Monitoring the finances to ensure your meeting and will meet the PWF requirement and the spending of your overall budget. Staying on top of any under spending, overspending, over enrollment, under enrollment those that impact those spending requirements. Regular monitoring of your performance outcomes, annual

monitoring of your grant is required. You are required to develop a monitoring tool and also have an annual monitoring schedule. So maybe some might ask, where is that required? If it's not in your grant package, it is clearly noted in the programmatic assurances that we mentioned earlier. So, you would need to check that there. There's a section there under administration that clearly states that grantees must have the two items, your monitoring tool and a schedule. Let's talk about some sub grantee management. Even though DOL does not involve or not involved in your procurement process or your contracts with sub grantees, however, there is an expectation that you manage your sub grantees, as required under the terms and conditions of your grant and that you pass through to your sub recipients the same terms and conditions of your grant to your sub recipients. There is a clause in your grant agreement, that's under sub awards. It is based on two CFR 200 which is managing sub awards. It does state that the terms and conditions of the award will be applied to any sub recipients under the award. It also states that grantees is responsible for monitoring the sub recipients, ensuring that the terms and conditions are all sub award packages and that the sub recipients comply with all applicable regulations and terms and conditions of the award. I know this is a lot to digest I'm sure, but I'm getting ready to wind down my portion of this session. So, let's cover some of the key points that we discuss on the next slide.

Next slide please.

So the key points that we hope you take away from this session is about program compliance. Adhere to federal regulations. Comply with all the federal regulations, guidelines and program insurances outlined in your grant agreement. Follow the grants terms and conditions and fulfill all the terms and conditions of your grant agreement. Maximize participants success, such as increase employability, improve self-sufficiency and enhance quality of life of your participants. Financial management. Proper budget management. Develop and adhere to a responsible budget, ensuring program funds are used appropriately and efficiently. Accurate record keeping. Maintain accurate and complete financial records for all programs, activities, and expenditures and of course, timely reporting. Submit timely and accurate financial reports and program reports to DOL as required. Monitoring and evaluation. We should be tracking your progress against the program plan or your scope of work. Monitor key performance indicators and identify any deviation from your plan. Identify and assess potential risks throughout the program. Life cycle analyzing your data and if needed, take corrective actions to keep the program on track. Conduct your own program evaluation. Conduct regular program evaluation to assess program effectiveness and identify areas for improvement and of course, continuous improvement. Regularly evaluating your program performance and the overall operation will ensure

continuation improvement, and if that need be, you can always course correct as we mentioned or you know, implement corrective action plan if needed, but this also helps you to be prepared for any auditing and monitoring that comes your way. By fulfilling these key responsibilities, SCSEP grantees can assure the successful operation of your program, maximize participant outcomes and demonstrate your continual commitment to serving older adults in their communities. So, with that being said, this ends my portion of the presentation.
So I am going to go ahead and hand it over to Joyce.

Barcley, Joyce M - ETA CTR 54:53
Thanks, Michi.
That was a lot of great information. So good afternoon, everyone.
My name is Joyce Barcley, and I'm also with TwoTech, so we're going to talk a little bit now about the responsibilities of the case management process and we're talking about how it's primarily the role of the grantees, case managers and supervisors. However, we know it's really the responsibility of the overall grantee team to get from community outreach to engage qualified applicants, recruiting host agencies for quality community service assignments and working with employers. So, let's talk a bit about the responsibility of the program staff or case management services to both the participants and host agencies. By signing the grant agreements, programmatic assurances, that Michi had been talking about previously, each grantee has certified they will ensure the recruitment of eligible applicants, based on the program eligibility requirements. Sufficient applicant recruitment is critical to ensure the program can meet its goals and equitable distribution requirements, so that recruitment is one of the key factors. Without recruitment, no participants. No participants, no program. So, after intake, case management requires providing comprehensive program orientations for participants to have a clear understanding of the program.
Rules and the participants responsibilities.
A thorough assessment must be conducted to identify the participants educational unemployment history, their employment goals and that information is used to develop the participants IEP. Going forward, assessments are conducted at least twice a year to ensure the IEP is current and outlines the training and services that will guide the participant toward their employment goals. However, if it appears that participants goals may have changed or the employment might not be achieved by the end of their program duration, the employment plan must contain steps that will help the participant transition from the program and connects participants with services they may need in the community without SCSEP support.
The next group for which grantees have recruitment responsibility are our host

agencies, and as we know, host agencies play a significant role in the overall success of not only the participant, but for your program, 'cause without host agencies, there are no community service assignments. We know that recruiting and maintaining enough host agencies and a variety of assignment types is essential to meeting the participants training and employment goals.

Then of course, there's a third group that's helping the program's success, and that's employers. Engaging employers through job development, OJE training and other activities that only helps expand community awareness. But it is important for positive participant outcomes. So now let's talk more about the responsibilities of participants and host agencies to the SCSEP program.

Next slide please.

Participant responsibilities are twofold. First, they have a responsibility to themselves while enrolled in the program. Some of the basic responsibilities are fully participating in all program activities and adhering to their assignment workplaces rules. Participants must be reliable and punctual and contact their supervisor when they're not able to go to their assignments. They must also work toward their employment goal and participate in job search activities. Participants, though, also have responsibilities to you, the grantee, such as submitting their timesheets on time following your procedures for reporting absences, informing their supervisor or case manager if there are any problems on the site, training related injuries, either inside the community service assignment or in non-CSA training. And just as the participants have responsibilities, so do host agencies.

Next slide please.

Host agencies required to provide a meaningful, safe and healthy training environment for participants. Along with that, they're required to provide supervision and not leave participants without someone to ask for help, guidance, and of course to verify and sign time sheets. Host agencies also help participants with job search, especially if there are positions within their own agencies for which the participant qualifies, or the participant could qualify for by changing their assignment to gain those jobs. Lastly, but certainly not least, host agencies must ensure that there is no violation of maintenance of effort and never give the participants the impression that they’re employees of the host agency.

Next slide, please.

So in summary, the bottom line for case management is to recruit and enroll sufficient number of eligible participants to establish employment plans that include training and support services needed by the participant to progress toward employment and to monitor participant progress in those assignments. Also, recruiting a variety of host agencies that provide meaningful and safe work experience and to develop and

maintain relationships with community partners to help achieve program goals.
Now we'll move to the Q&A portion end of this presentation.
Next slide. Thank you.

Wilson, Toni K - SCSEP 1:00:53
Thank you so much Michi and Joyce, we really appreciate this information. I know you guys are really good on this and just as a reminder, TwoTech is also our technical assistance contractors. So where we're having challenges in these areas, in addition to working with your federal project officer, you can flag for your FPO where you may need some additional assistance.
So we appreciate that.
Once again, if you have any comments or questions, please put those in the chat.
We'll stop here and see if there are any questions.
Let's see.
I know there was a question and reference in a specific reports that we would need to run in reference to monitoring and evaluation outside of the IEPS.
I'm not sure if anyone's on the call that is able to answer that at this time.
If not, we'll make sure that we have that in our FAQ.

McNeace, Meche - ETA CTR 1:01:49
Toni, I could jump in here real quick.

Wilson, Toni K - SCSEP 1:01:51
Thank you.

McNeace, Meche - ETA CTR 1:01:52
You're welcome. And yes, there are several reports in Gpms under the management report section, under the report section in Gpms that you can run to be included with your monitoring. There is, like the participant current and exited report, host agency reports. We also have participant extracts, checking your IDL reports. So, there are a good handful of reports that you can use to help with your monitoring to just go into gpms and run those reports.
OK.

Wilson, Toni K - SCSEP 1:02:32
All right. And as we had mentioned earlier, we will be doing a later gpms training.
You'll hear a little more about state of Gpms and so there'll be opportunities to get into a little more detail of those reports as we move into that space.

All right.
Well, it looks like most of our questions were answered.
I know there are some questions in the chat that have not been answered, but they will be addressed in later parts of the presentation, so we're just holding on that.
But please once again put anything you have in the chat for questions.
All right, next slide please.
So with that said, we are going to continue on with SCSEP requirements and compliance and it's my pleasure to introduce Irene Adams. Irene and she is one of our workforce analysts here at SCSEP and probably one of our longest serving staff members. So, I know many of you know Irene.
So, Irene, you're up.
I think we should probably take you off of teams, so you don't look like one of these playoff football games. So, we'll highlight you on your own. Alrighty.

Adams, Anita (Irene) - ETA 1:03:53
Alright, thank. Thank you, Toni.
Yes, 16 years in SCSEP this year. I celebrated the 16th anniversary on January 8th.
So I'm glad you didn't say the oldest. Thank you.
Thank you.
My name is Irene Adams, and as I said, I've been with SCSEP for 16 years and I am the National Office liaison for regions one, four and five, those are fabulous regions, and I love them. As well as many of our grantees in this segment, we will be discussing federal regulations governing SCSEP compliance requirements for grantees, reporting and documentation standards, and WIOA coordination.
Next slide please.
Is authorized under the older Americans Act of 1965.
We refer to the Older Americans act as OAA, and you will hear me say OAA.
throughout our presentation, we will be submitting in 1973 to establish as Title 5, which created the Community Service Employment Grant program, which is later known as SCSEP.
The OAA was amended in 2006 and 2010 and was last authorized under the Cares Act of 2020. The OAA's reauthorization of 2024, all those signed by a unanimous Senate, was not ratified last December under the continuing resolution CRHR 10545. The OAA will continue operating under the same conditions as 2024. New reauthorization was slated to be effective in March of 2025. Grantees are required to comply with the rules and requirements specified in the notice of award. You can find program requirements in the FOA or TEGL that you are responding to, as well as the statute, executive orders, governmentwide regulations, agency regulations and other agency policy guidance, for

example TEGL's and TEN's. The terms are also outlined within your NOA. You can find this information as well as the order precedents, that is the hierarchy of authority, in part A section A1 of your NOA, which is a notice of award. We use these acronyms all the time, assuming that you know what they are.
NOA is a notice of award
Next slide.
Lost my cursor here, sorry.

McNeace, Meche - ETA CTR 1:07:07
Irene, can I help you on this one?
I think Jada needs to go back two slides.

Adams, Anita (Irene) - ETA 1:07:13
OK.

McNeace, Meche - ETA CTR 1:07:14
So you talked about this, right?

Adams, Anita (Irene) - ETA 1:07:17
Right.

McNeace, Meche - ETA CTR 1:07:19
All righty.
So this would be the next one.

Adams, Anita (Irene) - ETA 1:07:29
Compliance guide.
Other compliance resources include title two of the Code of Federal Regulations. The 2024 uniform guidance updates that were published by the Office of Management and Budget became effective on October 1, 2024. The updates aim to improve the management of federal grants and make the process more efficient and accountable. Some key changes of the uniform guidance include community engagement. It clarifies the federal agencies should conduct community engagement as part of their grant activities. If you notice the changes in our process and the look of our notice of funding opportunities, it required NOFO's, we call them NOFO's, to be standardized simplified and written in plain English. It established threshold amounts, and increased threshold amounts for single audits, equipment and unused supplies. It provided for de minimis indirect cost rate, which increased the maximum rate of indirect cost without

negotiating an alternative rate. It updated because principles as well as changed the process for prior approval for request, and it enhanced the audit requirements.
Next slide.
Ah, you've seen this before.
These are the due dates for 9130's and the periods that are covered for the report. Remember, 9130's are the financial reports that are reported on an accrual basis. The instructions for assessing both the outline financial reporting system and cash drawdowns using the HHSPMS can be found in the transmittal memo, accompanied with your NOA. For additional guidance on ETA's financial reporting, please reference ETA 9130 financial reporting resources. I'll put that link up in a few minutes. Also, SCSEP grantees are required to submit 9130 and programmatic quarterly narrative reports within 45 days of the quarter end. A final financial report must be submitted within 120 days after the program year end. The last or the fourth QNR will service as the final performance report. Grantees are required to use the standard forms and instructions for these reports and should use the standard reporting processes for submissions. You can find further information in reporting and documentation in Part E of your NOA.
Next slide please.
This, of course, is the schedule for QNR's. QNR's must summarize project activities, employment outcomes, and other deliverables and related results of the project. Also, if you have an ATSS approved, that is an additional training and supportive service waiver. If you have an approved one, then your QNR should include a report out on the progress of that ATSS and the description of your accomplishments.
Remember, these reports should provide both quarterly and cumulative information on the award expenditures of activities.
Next slide please.
WIOA coordination.
SCSEP is a required partner of the Workforce Innovation and Opportunity Act.
We call that WIOA. WIOA is a law that is designed to improve the public workforce system by assisting job seekers, including those who are low income, on public assistance or lacking basic skills, to obtain employment and careers, helping employers, hire and retain skilled workers.
What does this look like?
Well, SCSEP is a part of the one stop delivery system. SCSEP services and activities are coordinated with WIOA activities and grantees and states work together to minimize duplication. The presence of MOU's that address reciprocal arrangements and the contents of the SCSEP and WIOA individual employment plans, IEP's. And here's something new. The National Center of Leadership for the Employment and Economic

Advancement of People with Disabilities, that's LEAD, is a policy development center that delivers policy research and recommendations, technical assistance and demonstration projects that promote and facilitate the adoption and integration of WIOA programs policies and practices. The LEAD center has developed a new resource that provides States and local workforce staff with tools to improve collaboration with key partners, reporting to grant providers and partners and service provisions. It includes details on an exemplary effort in Wisconsin to illustrate the potential of such partnership. I am putting the link to that effort in this chat, that you can go and see and check it out. Some takeaways from this section include WIOA's coordination is crucial to the programmatic success States and national operating and those states should. I'm sorry. Let me start again.
WIOA Coordination is crucial to your programmatic success. States and nationals operating in those states should collaborate with the WIOA, One Stop American jobs centers and the local workforce boards, particularly in the state planning process. Quarterly financial and narratives are required to monitor the progress of your program. Be mindful of the due dates and information required for these reports.
You will hear about the migration of reports to WIPS in the performance segment presented by my colleague, Ali Slaughter, later.
Here are a couple of links that. To the financial reporting and to the QNR, the template that we are using at this time. And we'll move to questions and answers. Any questions? If there are any questions, please include them in the chat.

Wilson, Toni K - SCSEP 1:14:51
Alright, thank you so much, Irene.
I appreciate you going over that information for everyone.
Just a few things to highlight or flag.
I know there was a question in reference to the grantee handbook.
I know I put the PDF in the chat, but it sounds like some people are not able to open it, so we're going to make sure we have that on our Community of Practice and we'll share that link. So hopefully we can get that in the chat before today is over. But we'll make sure everybody does have that.
Also.
I know for especially those that are new and as you bring in new staff, there is a SCSEP alphabet soup document has all the acronyms and what they mean. So that's a great document to have on your desktop. You can easily just do Ctrl F and find things. We will try our best to try to make sure we define, but that's a good resource to have. So that's that is in there for you.
And then thank you, Irene, for that LEAD resource. We also did a presentation on this on

one of our grantee calls and I know that was recorded. So, we do have some information on that on our Community of Practice also if anyone is looking to do a deeper dive.
Alright. And I know that there is a series of questions in reference to the PMS system. As Steve had stated at the beginning of the call, and just for clarity, we don't have any further guidance.
That is correct.
The system is currently unavailable under the administration. It has been put on pause. We don't have any further guidance at this time. We will keep everyone posted. If you have any additional questions, please go through your FPO. All those things are being channeled through the FPO, but I just wanted to kind of make sure that that was answered in reference to the PMS being currently unavailable. Our understanding it is temporary, so we will keep you posted on that.
Alright.

Adams, Anita (Irene) - ETA 1:17:17
Community of practice.

Wilson, Toni K - SCSEP 1:17:17
And yes, yes, yes.
So the Community of Practice, which is our older workers, which is all of our SCSEP Community of Practice. The Great news is that tomorrow we'll be doing a full walk through, but we can put a chat. I mean put a link to the CoP. One of my colleagues will put that in there to make sure you can link to that in the meantime, and there will be a page in reference to all things from this, but we'll also do a great walkthrough tomorrow on some great resources, including things that are outside of SCSEP. ETA is doing some great work in this. Various products that they've used based on work that they've done with businesses sector strategy, recruitment, lots of resources, so we'll want to make sure that we have an opportunity to both share what we have on our page and some other things.
So that's just a little preview.
All right. Are there any other questions?
Right. I think for right now there are no other questions.
Once again, a reminder, if you do have any questions, please put those in the chat.
And we'll be sure to collect them.
We're also going to be doing an FAQ, and I know we've gotten a few, but if you have things that you'd like to see, a peer-to-peer, please put that in.

Next slide please.
So with that said, we're all going to stretch our legs for a minute, hopefully get something a glass of water, maybe a little caffeine if needed.
Michi. I'm gonna pass that to you for a second.
We're talking.
How long did we say?
About 15 minutes.
Just wanna make sure I have that right.

McNeace, Meche - ETA CTR 1:18:57
And Jada will put up that time clock.

Wilson, Toni K - SCSEP 1:18:57
Alright, alright.
So we got a time clock here, so everybody can kind of just, you know, feel free to turn off your screens, walk away for a minute, and we'll reconvene in about 15 minutes.
Our plan is to go to four today, though I believe we'll probably end up going until 3:30. So it'll give everybody a chance to get back to their work.
So we'll see you on the other side. Thank you.

Wilson, Toni K - SCSEP 1:34:19
Alright.
Welcome back everyone.
Before we jump in, just wanted to flag that we did put into the chat.
I know that we put the ETA, the grantee handbook, which is on our SCSEP Resource Hub page. That page that I was talking about where we'll be posting all things from our sessions so you can find that. I put the actual link, versus the document. I know some of you weren't able to open the document, so there is the link and that should make it a lot easier, and I see we have a few additional questions we're gonna be finishing up one other piece and then we're going to move to Q&A. So just in reference to planning the rest of afternoon, I think we'll be wrapping up a little shortly, but we do have several questions. So that'll take some time, and if you have some more, please put those in the chat.
All right, so let's get started.
So next we're going to be discussing the overview of our funding sources. We're going to get into some of the financial reporting and accountability. Once again, this is a little more high level, so don't panic. Your financial teams do not, just clear that I'm saying. not need to be on the call. This is more high level, and hopefully for the past six months,

they've been doing this work. So, if there are some additional questions, we have that core monitoring supplement guide should be able to answer and same with the ETA grantee handbook that's in the chat. We're also going to discuss a little bit around the SCSEP cost categories, including that administrative and programmatic cost and monitoring your and total expenditures. And then we will wrap up with some closeout process and then as I said, we will finish today with some Q&A, and we have some in the hopper. You're free to put some in the chat and then we'll talk about what we're going to focus on for tomorrow afternoon. All right. So, with that said, next slide please. Alright, so let's jump in, in reference to funding and financial management.
So Irene has agreed to partner with me on this section. Or maybe it's me partnering with Irene as I'm sure it's more in that case. So, I will pass it over to Irene.

Adams, Anita (Irene) - ETA 1:37:09
Well, thank you, Toni.
In this next session, we'll discuss an overview of the funding source, the financial reporting and accountability, that which includes allowable and unallowable costs, budget requirements and a little description of the SF424, SF424A and budget narrative, and how they match and why they are important. We'll be discussing SCSEP cost categories, administrative and programmatic cost. The difference between and the dynamics of the two and modern team.
PWFB. Now PWFB is another one of those alphabet soup that we have that's participant wages and fringe benefits. So, monitoring participant wages and fringe benefits to total expenditures, and then we'll just give you an overview of the close out process. I know there's been a lot of things about that exactly how that is, how that pops off. And so, we'll just give you a slight overview of that as well, OK.
Let's move forward next slide please.
SCSEP is funded through congressional appropriations. If you didn't know that you know we get held up in Congress waiting for them to pass a budget. Congress approves the budget, which includes the DOL funding. What we do here at DOL, we come back, we compile a budget and send it to Congress for them to scrub and then they put all the agencies together and they begin to scrub those budgets and try to figure out who needs what and when. Federal agencies create budget requests and submit them to the White House Office of Management and Budget. OMB refers to agencies request as it develops the budget proposal for the President. The President then submits the budget proposal to Congress early the next year. Proposed funding is divided among 12 subcommittees, which hold hearings. Each is responsible for funding what different government functions, such as defense spending or energy and water. The House and Senate create their own budget resolutions, which must be negotiated and merged.

Both houses must pass a single version of each funding bill. Congress sends the approved funding bills to the president to sign or veto, and then voila, the federal funding accountability and Transparency Act. FFATA or Transparency Act, along with other financial accountability requirements, are outlined in part E of your NOA. So, after step 6, which is, Congress sends the approved funding bills to the President to sign or veto, then the money is moved to the Department of Treasury for disbursement which we have been for so long trying to get you guys to be funded before, on or before July one and we've been doing it lately. We've been on point lately, but sometimes it gets like hung up because of course SCSEP isn't the first. No worries. The Department of Labor High on the list of who gets funded first. What Treasury does the highest priority is our veterans and defense. So, they make sure they they're taken care of first and then it goes down into a certain thing. But we're not last, but we're definitely not first on the list. So, in case we're a little late on getting your funding out, you know that is not us. We're waiting for treasury to actually put the funds into our accounts, so then we can make an award. We cannot obligate the government before we have the money. So, when we, during that period, we real closed mouth about what's in the TEGL and all of that because we cannot obligate the government first, OK.
Next slide.
I think this is you, Toni.

Wilson, Toni K - SCSEP 1:41:25
It is.
I couldn't get off mute fast enough. Thank you so much, Irene.
So I just wanted to touch base on allowable and unallowable cost. So, in reference to our finance reporting and accountability. The 2CFR part 200U guidance that provides a very comprehensive framework for what's allowable and unavailable cost for the federal grants. Let me be clear. That is your guidance. That is what you are listing in reference to what is allowable and unallowable. We are not using this time to go through the whole uniform guidance, but I did want to highlight a few things, which is some of the allowable cost. Keep in mind, generally cost must be reasonable allocable, necessary and consistent. Reasonable, that's where it's not excessive in relation to the goods or services that you received. If it's allocable, is it directly or indirectly benefiting the Federal award. Was it necessary, was it required for the performance of the award and was it consistent? Was it consistent with the accepted accounting principles and the terms and the conditions of the award? So, you want to make sure that you are looking through the lens of your allowable cost. Things that are unallowable generally are cost that are prohibited by law or regulations, and we want to make sure that you have a copy of your regs and always keeping that in mind as I also said, the core

monitoring supplement guide has a clear section on this so you can review that. We've also put in a chat a copy of the CFR, the uniform guidance itself. So, if you don't have a copy, that should be on your desktop. So, as I said, reiterating, generally costs that are unallowable or prohibited by law or regulations, are not necessary for the performance of the award. Not reasonable or admirable, incurred before the award period. So, you can't do things that are outside of the period of performance and are related to unallowable activities. So, anything that any activities are not allowed under your grant would be considered under these unallowable clause.
All right.
Next slide please.
Irene, I think you're on mute.
So you might need to start over there.

Adams, Anita (Irene) - ETA 1:44:08
Thank you very much, Toni.
I couldn't get off fast enough myself. I started dancing 'cause it was my turn to speak. Once the funds are awarded, we send out a TEGL. Without annual planning guidance and within that TEGL, we require certain forms. Those forms include the standard form SF424 and 424A, and a budget narrative. All grantees must submit these completed forms in order to receive SCSEP money. These forms contain vital information about your grant, including match amounts, who's authorized to sign documents that commit grantees to the funds and to the activities. It also requires you to include your service areas to ensure that service is consistent with your authorized positions and equitable distribution. The budget and the budget narrative provide how the funds will be spent. Through line items, the information in your budget narrative must explain how each line item is going to be spent and provide any information on the amounts and where these funds will be going, will be spent on. The budget must be consistent with activities and any waivers you receive, and we'll talk about those later, we'll talk about two types of waivers that impact the budget. That's the ATSS and the increasing administrative cost limitation. To impact the budget, we'll talk about that later.
So don't fret, don't panic. We got you on that, but they must be consistent and submitted. These forms are submitted as if these waivers were approved. OK, so it must reflect your administrative cost limitations and your PWF reductions.
Next slide please.

Wilson, Toni K - SCSEP 1:46:09
Right. So, in reference to cause categories.
Section 640-1853 of the Reg states, all costs must be classified as administrative cost

or programmatic activity cost. So, the SCSEP budget breaks down by this administrative cost or programmatic activity cost. Under the administrative cost, it's a 13% limit and you can request to increase to 15% Through your OSR. Now, under the programmatic cost, 75% is for participant wages and fringe benefits. You can request to reduce no less than 60 to 65% under an OSR or ATSS that Irene had mentioned. I do want to flag that participant wage and fringe benefits, this is probably the biggest issue that I see in closeout, where people have not met that and are not having discussions until after the grant is closed. You need to watch and make sure your participant wages and fringe benefits are met. If for any reason you are doing an OSR or and ATSSS, and it is being reduced, you need to make sure that you have that officially in your grant package and is amended, and that is part of your packages and is agreed upon. Otherwise, you would need to pay back that difference, so can't stress that piece enough. I just want to flag that 75% participant wages, I know our close off always says just take that off the top. Make sure that that's done and then go from there.
All right, I'm going to pass this back over to Irene.
Irene, you're back on mute.
So if you can start over again.
We'll get it there.

Adams, Anita (Irene) - ETA 1:48:15
I know, I know.
Here, we just wanted to show you how the cost categories are broken down in the pie chart. Also, participant wages fringe benefit, PWFB, comes from the programmatic cost, which reduces the whole grant funding 87.5% down to 75%, which leaves around 11.5% to use toward cost under this category.
Next slide please.
So, here we are.

Wilson, Toni K - SCSEP 1:48:54
Oh no, I'm doing this. I was on mute.

Adams, Anita (Irene) - ETA 1:48:56
Oh no, go ahead. Sorry, I'm sorry.

Wilson, Toni K - SCSEP 1:48:57
No, it's all you. It's all you.

Adams, Anita (Irene) - ETA 1:48:58

Go ahead. Is it?
Nope, no it isn't.
It's yours.

Wilson, Toni K - SCSEP 1:49:00
All right, it is.

Adams, Anita (Irene) - ETA 1:49:01
That's yours, I skipped.

Wilson, Toni K - SCSEP 1:49:02
We are got it.
So monitoring your PWFB's versus your total expenditures. So, monitoring participant wage fringe benefits against your total budget expenditures can be as crucial to one, ensure that your program can operate within your allocated funds and avoid any potential funding shortfalls. This is also a way to make sure you're managing any overspending and underspending of your PWFB's and other costs. As I mentioned earlier, that is an area where we see the most in close outs. So, if you're monitoring this along the way, this is a way to stay on top of that too. It also allows for a timely adjustment to the budget if needed. So if you're monitoring and staying in communications with your FPO, there it allows you time to make adjustments. Adjustments if and where needed, and you know, as long as it's possible and to help meet the close out requirements that states in 2020 CFR 641-873 that the SCSEP recipient is in compliance with this provision if at least 75% of the total expenditure of SCSEP funds provided to the recipient was for wages and benefits. So once again, making sure that that's done in reference to the closeout piece, I'm going to pass it over to Irene, who's going to talk a little bit about the close out piece.

Adams, Anita (Irene) - ETA 1:50:37
And next slide please.
I just stayed off of mute.
Just kept quiet.
Next slide please.
Oh.
Thank you.
So this is a short, a small look at the close out process. And what? How this is kicked off? So, what happens is the grant, the close out officials receive notice that the grant is near its period of performance. That happens there around mid-June. Then the notices

are sent to the grantees to confirm that, yeah, this is the period of performance, and this is when the grant ends. Once you guys have confirmed that the status is confirmed with the program office and the FPO, when I say status confirmed, sometimes there's a little mix up about whether or not you had a waiver and those waiver documentation should be submitted with any of your close out documentation and you will also receive notification of the things that you need in order to close out. So, with that on the right there, you have all of the documentation that's necessary in order for you to proceed with close out documentation for all your direct and indirect costs. Your approval letters for your OSR's and the grant agreement or cooperative agreement for the de minimis rate, indirect cost rate, OK.
The de minimis rates. So, I'm going to give you two little links here. One, is for closeout packs. The first one is for closeout packs and the next one is for sam.gov's overall grant close outs and things that you need. So, the first one is ETA, and the second one is overall sam.gov requirements. So, you should see ETA's grant closeout web page for further information on the close out process. Grantees responsibility at closeout may be found at 2CFR 200.344.

Adams, Anita (Irene) - ETA 1:53:13
Me.

Wilson, Toni K - SCSEP 1:53:16
Alright, we're gonna.
And please, there we go back on mute.

Adams, Anita (Irene) - ETA 1:53:21
OK.
Thank you. Thank you, Toni.
And also the close out information can be found in Part E section E6 of your notice of award, giving a lot of information about the close out process and where you can find it. The only liquidation that can occur during close out is the liquidation of a crude expenditures, not obligations for goods and or services received during the period of performance specified in the award. Property certification detail statement of cost and inventory forms for purchases over $5000 must be included. Not having documentation for direct or indirect costs will result in cost being disallowed and subduction not having documentation of a waiver and you cannot ask for ATSS during close out. And there's a reason for that, and the regs require that an ATSS you with the submission of ATSS, you have planned activities, and you can't plan activities after the fact. So, we don't provide ATSS waivers once you are in close out. So, you need to really take a look at your needs

and look at your PWFB spending. And make sure that you adhere to what you were approved for whether it's less than 75% or if you must meet the 75%, you must monitor and do so. We can't stress that enough, Toni stressed it. We can't stress that enough, so please make sure you monitor your PWFB so that you are not paying back money in the in the long run. OK. I think that's it. I think we can move the questions and answers Q&A.

Wilson, Toni K - SCSEP 1:55:20
Alright, thank you so much, Irene. Before we get to the collection of questions that we have throughout the chat. I know we have some that are just for this section, so we can probably start there.
I did want to flag OSR. As you can see, that's optional special request. We're having a whole section on that tomorrow, so we're not going to do any kind of deep dive there, but did want to flag. That's what it means. So please tune in tomorrow if you're not familiar with that and you'll get some more information. Alright. And then Irene, let's see, I wanted to start with you on a few of these questions before we get to the. Can you confirm that the 75% is the total grant package including the match?

Adams, Anita (Irene) - ETA 1:56:06
The 75% is on expenditures. This total program cost, your match is what you have to put in, which is 10% unless you are territory, and you don't have to meet match. But no, the 10% match is what you have to put in, not your expenditures on participants.

Wilson, Toni K - SCSEP 1:56:29
Right. So that's 75% does not include that match, and if you do have any questions, once again we remind you to you know, your FPO is your friend. They're there to help make sure that you have the assistance you need to have a successful grant. So please make sure that you reach out to them, if you're having some challenges in this area.
All right, let's see. The next question we have.
Is it required to submit an ATSS, in order to pay for supportive services or can supportive services be paid for without an ATSS or OSR. I know we're going to be going into some of this tomorrow, but I don't want that one just kind of hanging there.

Adams, Anita (Irene) - ETA 1:57:15
Yeah, if you have the funding to provide supportive services. Some of these other grantees on the call would probably love to know how you're doing that. But you don't have to have an ATSS to provide supportive services. There's a couple of them that are required in the program like the like, the physician, the doctor's visit, the initial doctor's

visit. So that's a supportive service that is covered in the grant itself, but no, you don't. An ATSSs is not required. But it would help you out a lot if you had one.

Wilson, Toni K - SCSEP 1:57:55
Alright. And we're gonna get in more detail of that tomorrow, but just wanted to flag that one. All right, so we're wrapping down to the Q&A, and we have probably about a dozen questions. So, we're gonna get started on that. Please, if you have additional questions, you can add them to the chat. We'll be do our best to answer most of them today. Anything we can't, we'll make sure that we follow up on an FAQ and we will be following up with an FAQ on all of the questions that have been asked, with their answers. So that'll be part of the attachment with all of the slides on that resource hub that we have put into the chat.
So, I'm gonna get started.
So with the team, if you guys can be ready and jump in and where we can answer some questions, I'm gonna start out with you, Irene. I know there's a lot of these.
That's the good part of being one of the senior members, you have a lot of the senior answers. So, for one, is how can we improve collaboration between state and national SCSEP grantees to make it a better program?
You're on mute. So, you wanna start that over?

Adams, Anita (Irene) - ETA 1:59:13
I love that one because the FPO's and I encourage you to start contacting the nationals that's operating in your state immediately as soon as those awards are made. If you need contact information for the nationals operating in your state, then please reach out to us and we will put you in touch with them. But how do you start?
You start with a conversation about SCSEP. What are they doing? How are they providing services? Is there different ways to start a conversation there? They are your friend. So, you need to start a relationship with them, especially now that they are operating in your state and they need to take a part, nationals, need to take a part of your state planning process. They need to provide input to your state plan and if I'm not mistaken, the guidance for modifications will probably go out at the end of this year.
At the end of this year is not the time to initiate a conversation, now is the time.
Start trying to contact them now. If you need help fostering that your FPO and NOL can help you do that.

Wilson, Toni K - SCSEP 2:00:31
Alright, thank you so much, Irene.
Just real quick, a NOL, is our national office liaisons like Irene.

Irene, please stay off mute 'cause I got another question for you. But I did want to flag that that question was also a great one in reference to a potential peer-to-peer.

Adams, Anita (Irene) - ETA 2:00:43
OK.

Wilson, Toni K - SCSEP 2:00:50
I'm sure that that's something a lot are working through and like to hear some good sources, so I'm going to flag that as one of those to put into our hopper for peer to peers.
Our next question is for you Irene, though anyone can jump in. But I'm directing this to you. What does SCSEP define as a part time training assignment? Or is the number of hours at the discretion of the grantee.

Adams, Anita (Irene) - ETA 2:01:15
The number of hours is it.
Well, the number of hours, the part time part is prescribed in our Regs, it's embedded in there. That is part time, Community service work. And Michi can really.
Because Michi and Joyce actually have administered the program. They could probably give you a deeper answer than I can, but part time is embedded in our Regs and 20 hours a week is up to whatever's part time, right, Michi? I'll let you jump in and answer that.

McNeace, Meche - ETA CTR 2:01:51
Thanks Irene.
So yes, the Reg's doesn't indicate specific hours, but it does, like Irene said, notes part time. So, when you consider part time, you're looking at what is considered part time within your state labor law requirements. But the Regs do state that the department gives a benchmark of 1300 hours per year. So that average is around.
20 to 22 hours per week, so hopefully that helps. Keep in mind part time is part time.

Wilson, Toni K - SCSEP 2:02:27
Thank you, Michi and Irene.
I appreciate it, Michi, if you can stay on, I have a question to you around federal holiday paying participants. Do you have any information you can share on that?

McNeace, Meche - ETA CTR 2:02:40
Yes, we know that the federal regulations is kind of kind of confusing at this, but in

section 641.565, is when it talks about the wages. It has one section speaks that grantees must pay, compensate participants for when a host agency is closed for federal holiday, and they are scheduled to work. So that means you would pay. You could either pay that participant or have off the hours, but it also has a section in the regulation that could be somewhat confusing where it talks about grantees and sub recipients may not provide payment or otherwise compensate participant for unused benefits such as sick leave or holidays. So, the way that I believe this applies, and it has been this way for quite some time, is that it's stating that grantees sub recipients cannot have a sick leave benefit policy that includes holidays, where you know in regular employment you get your PTO or your sick leave. And then everybody automatically gets paid for holidays. So, this is what I believe this section of the regulations is saying, because and above where it says grantee and sub recipients must provide compensation for scheduled work hours, during which a host agency business is closed for a federal holiday which may be paid or in a form of rescheduled work. So, I guess we can try and clarify it better, but I hope I kind of did a decent job.

Wilson, Toni K - SCSEP 2:04:28
I think you did a decent.

Adams, Anita (Irene) - ETA 2:04:29
It's all about, yeah, it's all about making up the hours. If you're gonna pay them for it, then they have to work it at some other time so that it's justified them being paid.

Wilson, Toni K - SCSEP 2:04:42
Thank you so much, Michi and Irene.
We appreciate that and if there is anything else add that we'll make sure we add that to the FAQ. But I think we've captured that. All right, I'm going to pull on Ali for a second. Let me see and Irene get a glass of water. So, Ali, we have a question in reference to can a participant who is on the county line in a rural area be enrolled in an adjoining county. If not, can they work in the adjoining county?

Slaughter, Alison S - ETA 2:05:15
Why everyone, good afternoon. Wonderful question.
If a participant must be enrolled in the county that they live in, and the grantee must be serving that county in order to enroll that participant. However, if there is a host agency that is easier for them to get to or closer, that is in a different county, then they can certainly be completing their CSA at that host agency in a different county.

So the important part is that they're enrolled in the county that they live in, but they can complete that host agency, or CSA, assignment in a different county.

Wilson, Toni K - SCSEP 2:05:52
Alright, thank you so much. Ali.
Irene, before I jump to you, just wanted flag that some of the questions are more what we would do under a peer-to-peer. I just want to acknowledge there's some in reference to ideas around match, in kind or match. Just some ideas in reference to how to meet that. That is something that we can do through a peer-to-peer and will be and that for monitoring, supplement guide has a little bit tips on that in there. So, I encourage you to check that out. There's also some questions in reference to kind of when to do virtual trainings versus in person, not in person trainings, especially around transportation issues. That is another good one that will be looking at in reference to our peer to peers. And then just some ideas in reference to helping grantees, I mean participants, in reference to ownership around their employment and maximizing their time in the program. So those are kind of all more general how people are doing in their program, which is going to be a great opportunity for us to do some peer-to-peer. As I had mentioned earlier, hopefully we can do some of those in person. But our plan is to do those between now and throughout the grant, but definitely at least a few of those before we hit the end of this year's grant cycle.
All right. So, Irene, hopefully you are up and ready.
I have another question for you, which is, can you explain the process of what happens once the TEGL is released to apply for the next program year?

Adams, Anita (Irene) - ETA 2:07:51
Sure. OK.
So the TEGL is released.
First of all, you'll hear me say on the all grantee call before when the TEGL is in process, OK and I will still like give you some things that you could be working on before the TEGL is released. So, the TEGL is released, and you have 30 days to respond with an SF424 and SF424A, a budget narrative, a program narrative, which includes your minority report as well as other documentation about your grant, like any optional special request. Once those are submitted through E Solutions, grant solutions. E solutions was the old version of the grant solution. Once it's uploaded, the system should notify the FPO that you have submitted documents. That doesn't always happen, so it’s just good for you to just send a copy of your submission to your FPO, just in case. So once that's done, the FPO and the NOL review your budgets and your OSR’s and there is a review we may get on the phone and call you to clarify or ask you for some revisions of

some of what you have submitted and then you resubmit them back through E-solutions, and with a copy to your FPO. Once they are reviewed, we get all of the recommendations. We concur on the approval of your documentation or what you have submitted, and we refer it to the grant officer 'cause we don't really approve we sort of ask the grant officer to sign off on your ATSS and your grant application and once that's done, the Grants office builds your NOA, your notice of reward, based on the approvals and then you receive your notice of award, which you won't get until we actually have the money in the bank.
So that's the process. Was there anything unclear in that process that you needed clarified? Whoever asked that question?

Wilson, Toni K - SCSEP 2:10:25
Let's see.
It didn't list, but if you do, please add that to the chat. If you do not mind. I believe it was the great state of Georgia. So, if you do have something you'd like to follow up, you can put that in the chat.
All right. Our next question, once again, Irene, I'll give you a break for a second and pull Ali up. So, Ali, will there be any PEARL reporting requirements that need to be captured in the Americans One stop operating system? Are SCSEP participants required to be co-enrolled in WIOA adult title one?

Slaughter, Alison S - ETA 2:11:07
Hi again everyone, another great question.
We'll breakdown some of the acronyms.
So PEARL, is the participant, individual record layout and it is all of the data elements that not only SCSEP reports on, but also all of those that other ETA focused programs including WIOA, report on and actually some of the Department of Education programs. For SCSEP, we share some of those elements with our WIOA partners.
So you do see some similarities. It sounds like the person who asked this question might also be involved in operating some WIOA programs at the state level.
So to answer the question in sort of two parts, no, SCSEP participants are not required to be co-enrolled in WIOA adult title one, but they can be co-enrolled.
They're a mandatory partner and so we encourage that. And co-enrollment, if it's applicable and needed for that participant. As far as the reporting across both programs, we do fall under the common exit rule for participant if they are co- enrolled, we are just getting our reporting system up to date into the into WIPS, which is where all other ETA programs report, including WIOA, so we can provide more guidance as we get set up in that system about reporting co-enrollment.

Now we don't. We aren't reporting co-enrollment through our WIPS file in SCSEP, but again you can have that co-enrollment across both programs.

Wilson, Toni K - SCSEP 2:12:48
Alright, thank you so much, Ali.
I appreciate that.
Alright, I believe I do know that there is a question in reference to the 10/21/24 which Steve mentioned at the beginning of our session. Just reiterating that the question is guidance on the 10/24 and how it relates to current state plans in the program overall, what is out is the current guidance and my understanding is that any additional guidance will be coming out from ETA. We will be sure to make sure that that gets shared and communicated with all grantees, if we do have anything that comes down. So, nothing has changed there. I just wanted to flag that.
Let's see. I think we've answered the majority of the questions that are here. I know there were some questions around outreach and recruitment, just in the sense of I think people are more flagging it as a peer-to-peer. That is hopefully one of the early ones that we plan to do. I know that's a consistent challenge across the board. So, we are looking for any of those grantees that feel like you have a best practice in this particular space. We'd love for you to be part of more like a guest speaker, even though it's a peer-to-peer, we'll all be sharing, but it's always great to be able to share a best practice. So, I encourage you to look at your organizations and you can just let your FPO, who will let her NOL's know that information.
Right. Right. Team, am I missing anything?

Slaughter, Alison S - ETA 2:14:35
Toni, we did have two additional questions from our chat today if I could address one at Irene. How long does a person have to be unemployed to qualify for the program?

Adams, Anita (Irene) - ETA 2:14:52
Yesterday.
Whenever, as long as they can prove unemployment. I'm sure that they can enter the program. You might want to be careful about that, because I believe that the income eligibility may count in that month. So yeah, and that sort of might take them over the limit of how much money they are making. But I don't believe there is a time period of when you can enter the program after being unemployed.

Wilson, Toni K - SCSEP 2:15:34
Thank you, Irene.

And Ali, did you have anything else?
You said that there were, but you said there were two, but I don't see any others that we can answer today. Don't forget we still have two more days. Tomorrow we're going to be focused on OSR's, kind of ATSS and be working on your IDL's and then our third day we'll give a brief on the state of gpms and we're going into performance. So, some of these questions, though, I understand people would like all of them answered today, but we'll need to make sure that we focus on that under our presentation.
Alright.
Anything else?
Alright, so with that said.
We are close to the 3:30, as I said, I knew we would. We gauged 3:30-4, so I'm happy to give people some time back. I know there's a lot going on and people could probably use the extra time. Some of our days, possibly on our third day, we can go to the full 4, so it varies there. So hopefully no one's mad at me if we end at 3:30. As I said earlier, we will be capturing all of these FAQ's. If your questions were not answered yet, they have not been ignored. Some of it will be answered during the last day and some of it is going to be answered throughout our presentations. And as I said, we do have that SCSEP core monitoring supplement guide. Please take a look at that. And we have our resource hub. We'll be posting this information from today and including over the next two days of information and we'll make sure we have a nice roll up with links on that and we're still collecting in reference to any peer to peers. What we'll be doing both in peer to peers and for some of this information, we'll be doing what we call a webcast which is kind of a 20-minute walkthrough of excuse me, 20-minute walk through of a specific topic. So, like take example, you'll hear some things on the third day about various reports, it'll be a full recording from A-Z on what you need to do. So, it both will have an opportunity to learn it here, but for some it'll also be a great resource that you can share with your staff. So, we're trying to think in that sense, what we find is that most that are on the calls you tend to need to be able to share those with all of your staff and stuff, so we're trying to create a nice portfolio of general information versus what side things you can share with staff and sub grantees? So just wanted to note that.
So, with that said. Happy first day SCSEP. I'm so glad to see all the new faces and all of the familiar faces. I look forward to meeting with everybody again tomorrow. And I look forward to some future peer to peers and really getting to get into what people are doing out in the field. So, we will touch base with everyone tomorrow and we want to have a great evening and be safe.
Thank you so much everyone.
Thank you again to the team. Thanks, Frodo team.
Thanks to TwoTech.

Thanks BCT and Steve for jumping on these calls and putting this together, you know, I appreciate you.
I wouldn't ask to be in any other boat than with this team, so thanks again.
Good night, everyone.

Bronson, Bradley K - ETA CTR stopped transcription