

February 2025



# Preparation for PY25 MOU Narrative, Budget, and Negotiator roles

# Overview

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**Impartial Lead Negotiator**

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**Program Negotiator**

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**MOU and Budget Spreadsheet**

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**Signature Page**

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**Direct Linkage Checklist**

# Purpose of Annual MOU Budget



- The annual one-stop operating budget is an essential component of the local MOU, which serves as a contract between required partners in the local area.
- The one-stop operating budget encompasses agreements on how required partners will share in two types of costs:
  - 1) infrastructure costs to which required partners must contribute to fund the operations of one-stop centers within the local area and
  - 2) local service delivery system costs that are identified by and agreed upon by required partners in the local area



# **Impartial Lead Negotiator**

# Lead Budget Negotiator



- The local workforce board chair will designate the lead negotiator.
- The lead negotiator will develop a general schedule for negotiations of the one-stop operating budget.
- They will identify the essential information needed to be gathered to support negotiations.

# Example of Information Gathered for the Negotiations



1. A list of all required partners participating in the local workforce area;
2. All contracts affecting or affected by the one-stop operating budget negotiations;
3. All lease information for the one-stop centers;
4. Actual costs incurred by required partners in the prior program year under WIOA;
5. The number of FTEs that required partners committed to the operation of the local one-stop delivery system in the prior year, as well as any information required partners collected to demonstrate the demand for their services at the one-stop centers in the prior year; and
6. The number of comprehensive one-stop centers, designated affiliate centers, designated specialized centers or other service locations in the local area.

# Lease Information for One-Stop Centers



1. Information on the term of the lease;
2. Specific cost items covered by the lease; and
3. Actual cost in the prior program year for all one-stop center infrastructure line items not covered by the lease.

# Initial Meeting



- At the initial meeting, the impartial budget negotiator and required partners will review and discuss actual costs from the prior year, the demand for services at the one-stop centers from the prior year and expected new needs for the upcoming program/budget year.
- The impartial budget negotiator will obtain assistance as needed to prepare a draft budget for future consideration by all required partners. The draft budget must be consistent with the MOU Guidelines.



# Initial Meeting



- The impartial budget negotiator will ensure a draft budget is presented to all required partners at least two weeks prior to a second meeting of budget negotiations.

# Second Meeting



- At the second meeting, the required partners will review the draft budget—which encompasses the infrastructure funding agreement—and make agreed-upon revisions.
- The impartial budget negotiator will prepare a final budget that allocates agreed-upon infrastructure and local service delivery system costs proportionately among required partners. These costs will be allocated among required partners in accordance with the agreed-upon cost allocation methodology and consistent with the MOU guidelines.
- The impartial budget negotiator will distribute the final budget at least two weeks prior to a third meeting of budget negotiations.

# Third Meeting



- At the third meeting, required partners will be asked to approve the final one-stop operating budget.
- The final, approved one-stop operating budget – which encompasses the infrastructure funding agreement – will be incorporated annually into the MOU through amendment procedures specified in the MOU.

# Amendment Year



- The amended sections of the MOU must be submitted using the “Cover Page for Submittal of MOU Amendments and Annual One-stop Operating Budgets” (provided as Appendix H to these guidelines), which specifies that the parties to the MOU mutually agree to the amendment and that all other terms and conditions of the MOU remain in effect.
- The “Cover Page” is provided as Appendix H to these guidelines and will be available as a fillable form on the WIOA Implementation portal.
- The completed Cover Page, the amended sections of the MOU and one-stop operating budget will be submitted to the individual designated by the MOU guidelines consistent with Section 5 of these guidelines.

# Questions



# QUESTIONS?



# Program Negotiator

# Program Budget Negotiator



- All required partners who are parties to the MOU will be empowered to make commitments on behalf of their partner agencies, including staff or other local representatives.
- Each required partner participating in the MOU development and negotiation process will designate a specific individual with authority to commit financially and programmatically on behalf of the required partner.

# Program Budget Negotiator



- All individuals participating in the development and negotiation of local MOUs will negotiate as equals and in good faith to reach agreement and to bring about a unified vision for the local one-stop deliver system.
- This includes participating in required partner meetings from the beginning of each negotiation period and addressing issues or requests for changes during each step of the development and approval of the MOU and one-stop operating budget.



# Commitment by Required Program Partner



Commitment to provide required career services by partner:

- Required partners in each local area are also required to complete a local version of the service matrices to identify each required partner's commitment to make required career services and other activities available in each service location during regular business hours.
- Commitment to make services available: Final Rule (20 CFR Part § 678.305(d)) requires that all required partners in a one-stop center make their programs and services available during all regular business hours.

# Commitment by Required Program Partner



Commitment of service delivery methods by partner:

- When negotiating each required partner's commitment to make services available in specific service locations in the local workforce area, the individual responsible for leading MOU negotiations must consider three allowable methods for delivery of career services and other required partner programs and activities.

# Commitment by Required Program Partner



The allowable methods are:

- Having a required partner program staff person physically present at the comprehensive one-stop center;
- Having a staff member from a different required partner physically present at the comprehensive one-stop center and cross-trained to provide information and services on behalf of another required partner; and
- Establish a direct linkage to program staff who can provide meaningful information and services through on demand technology.

# Cost Sharing Agreement



The MOU will include budget narrative explaining and supporting the annual one-stop operating budget spreadsheet to identify how required partners are sharing one-stop center infrastructure costs (i.e., the infrastructure funding agreement) and other, additional costs of the local workforce delivery system.

# Questions



# QUESTIONS?



# **MOU and Budget Spreadsheet**

# MOU and Budget Overview



- The MOU will include a budget narrative explaining and supporting the annual one-stop operating budget spreadsheet to identify how required partners are sharing one-stop center infrastructure costs (i.e., the infrastructure funding agreement) and other, additional costs of the local workforce delivery system.
- Cost sharing decisions and the infrastructure funding agreement will be documented in an approved one-stop operating budget using the prescribed spreadsheet.
- An electronic, fillable version of the most recent version of the one-stop operating budget spreadsheet will be available on the WIOA Implementation portal.

# Section 7 of the MOU Narrative



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

- In the spaces provided below:
  - *Explain the programs and services that correlate with the boxes checked in the Career Service Matrices.*
  - *For each program, describe the staffing plan around which services will be provided by in-person staff, cross-trained partner staff (include the partner's name) or contract provider (include the provider's name), or direct linkage (include the specific method of direct linkage).*
  - *For each program, describe whether services will be made available to walk-in customers, or whether an appointment will be required.*
  - *Describe how each required program's services are provided in real time in all service locations during all regular business hours.*



# Section 7 of the MOU Narrative



**IDES/Trade Readjustment Assistance** – IDES administers Trade Readjustment Allowances, a benefit under the TAA program, providing income support to persons who have exhausted their unemployment compensation and whose jobs were affected by foreign trade.

TRA staff provide the following basic career services: outreach, intake, orientation; referral and coordination with other programs; information and meaningful assistance with UI claims.

TRA services are provided to walk-in customers by on-site staff, Monday through Friday, and in real time during the regular business hours of 8:30 AM and 4:30 PM.

# Section 7 of the MOU Narrative



## CAREER SERVICES AVAILABLE THROUGH THE LOCAL COMPREHENSIVE ONE-STOP CENTER(S)

### BASIC CAREER SERVICES

REQUIRED PARTNERS	Eligibility for Title IB	Outreach, intake, orientation	Initial Skills Assessment	Labor exchange services, including job search and placement assistance	Referral and coordination with other programs	Workforce and labor market information and statistics	Performance and cost information on providers of education, training and workforce services	Performance info for the local area as a whole	Information on the availability of supportive services	Information and meaningful assistance with UI claims	Assistance establishing eligibility for financial aid for non-WIOA training and education
Trade Readjustment Allowance (TRA)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

# Section 7 of the MOU Narrative



**SCSEP** – National Aging Company administers services for older adults who seek employment and training assistance, as well as civic engagement. Through this service, NAC partners with community-based non-profit and government organizations to provide participants with training and opportunities to improve their skills and obtain self-sufficiency.

SCSEP staff provide the following basic career services: outreach, intake, orientation; initial skills assessment; referral and coordination with other programs.

SCSEP services are provided to customers via direct linkage through a phone line. Walk-in customers can call the phone line (XXX-XXX-XXXXX) Monday-Friday during the regular business hours of 8:30 A.M. – 5:00 P.M.

# Section 10 of the MOU Narrative



## 10. PROCUREMENT OF ONE-STOP OPERATOR (Governor's Guidelines, Section 1, Item 8(j)) (§ 678.600-635)

*[NOTE: Ensure that the following content agrees with and aligns to the budget spreadsheet and notes.]*

- *Name the procured one-stop operator and identify the agreed-upon one-stop operator model for each one-stop center in the local area. The operator may be a single entity (public, private, or nonprofit) or a consortium of entities (if the consortium of entities is composed of one-stop partners, it must include a minimum of three of the one-stop partners).*
- *Describe the functions and scope of work of the one-stop operator as defined in the Request for Proposal or as planned for the competitive procurement process.*
- *Describe the payment provisions, including the term, frequency and method of payment for one-stop operator services.*
- *For each shared cost center, state the total cost of the one-stop operator and the required partners which are contributing to that cost.*
- *For each shared cost center, explain the method of contribution(s) (e.g., cash, non-cash, third-party in-kind) each required partner is contributing to the cost of the one-stop operator. Example: A consortium partner contributes a non-cash contribution in the amount of the market value for specific services under the One-Stop Operator Agreement.*

# Section 13 of the MOU Narrative



## **13. COSTS AND COST SHARING OF SERVICES (Sec. 121 (c)(2)(ii) (Governor's Guidelines, Section 1, Item 1(c); Section 2) ((§ 678.510(a), §678.755 and §678.760)**

*Please complete the Infrastructure Funding Agreement (fillable MOU budget spreadsheet) and submit annually with the MOU or MOU Amendment.*

*In the space below and following the Governor's Guidelines – Revision 4, provide the following narrative:*

4. *Describe in the narrative the agreed-upon method that each partner will contribute as a proportionate share of costs to support the services and operations of the local service delivery system.*
5. *Affirm in the narrative that each required partner meets the minimum FTE commitment of .25 FTEs in each comprehensive one-stop center and each designated affiliate site.*
  - a. *If all required partners agree for a partner to commit to less than .25 FTE, then the local board may submit a waiver using the waiver request form included in the Report of Outcomes template (Appendix G of the Governor's Guidelines – Revision 4).*
6. *Describe in the narrative whether and which staff will be cross-trained to provide services on behalf of another required partner.*
  - b. *For each required partner providing cross-trained staff to deliver services on behalf of another partner, confirm how the contributing partner's shared cost allocations will be reduced in correlation with the number of FTEs that will be cross-trained to provide another partner's programs.*
7. *Please describe the invoicing process and any special deadlines for determining actual costs for each partner included in this MOU. (Please note that CSBG's grant cycle requires the partner to pay all actual costs within 30 days of the partner's 12/31 invoicing deadline and within 30 days of its 6/30 invoicing deadline each program year.)*

# Section 10 & 13 of the MOU Narrative Matches the Budget Spreadsheet



**Notes on cost allocation methodology if not FTE:**

FTE Cost Allocation Method is used.

**Notes on partner responsible for payment (payee):**

Each partner's method of contribution is cash. .25 FTEs for SCSEP is split evenly between NAC and IL Aging. The .25 for Perkins is shared between Southern CC (75%) and Southwest CC (25%).

**Notes on one-stop operator:**

Southwest Community College was awarded the OSO contract for LWIA 8. This contract is from 7/1/2024 through 6/30/2027.

**Notes on non-cash and third-party contributions:**

N/A - all cash payments.

**Other notes:**

# Budget Spreadsheet



		Required Partner FTEs Committed to Provide Onsite Program Services	Onsite FTEs Who Will be Cross-trained to Provide Program Services on Behalf of Another Partner				Total Onsite FTEs	Offsite FTEs Providing Program Services in the Center via Direct Linkage	TOTAL FTEs		
			Contributing Partner 1 Providing Services on Behalf of the Partner in Column B (If applicable)	FTEs Cross-trained to Provide Other Program	Contributing Partner 2 Providing Services on Behalf of the Partner in Column B (If applicable)	FTEs Cross-trained to Provide Other Program					
Commerce	Title IB - Adult, Youth, & Dis. Workers	4.00				4.00		4.00	Title IB - Adult, Youth, & Dis. Workers	Commerce	
	TAA	1.00				1.00		1.00	TAA		
	CSBG	1.00				1.00		1.00	CSBG		
IDES	Title III - Wagner-Peyser	0.50				0.50		0.50	Title III - Wagner-Peyser	IDES	
	Title III - MSFW	0.25				0.25		0.25	Title III - MSFW		
	Veterans Services	0.25				0.25		0.25	Veterans Services		
	UI Comp Programs	1.50				1.50		1.50	UI Comp Programs		
	TRA	0.50				0.50		0.50	TRA		
ICCB	Title II - Adult Education	1.50				1.50		1.50	Title II - Adult Education	ICCB	
	Career & Tech Ed - Perkins	1.00				1.00		1.00	Career & Tech Ed - Perkins		
DHS	Title IV - Vocational Rehab	1.00				1.00		1.00	Title IV - Vocational Rehab	DHS	
	TANF - DHS	-				-	0.25	0.25	TANF - DHS		
Aging	SCSEP	-				-	0.25	0.25	SCSEP	Aging	
DOC	Second Chance	-				-		-	Second Chance	DOC	
HUD						-	0.25	0.25	HUD		
	Title IC - Job Corp					-		-	Title IC - Job Corp		
	Title ID - National Farmworkers					-		-	Title ID - National Farmworkers		
	Title ID - YouthBuild					-	0.25	0.25	Title ID - YouthBuild		
	Other 1					-		-	Other 1		
	Other 2					-		-	Other 2		
	Other 3					-		-	Other 3		
	Other 4					-		-	Other 4		
<b>TOTAL - SHARED COST FTEs</b>		<b>12.50</b>				<b>12.50</b>	<b>1.00</b>	<b>13.50</b>			

# Budget Spreadsheet





# Questions



# QUESTIONS?

The graphic features a large white circle on the left side, containing the text 'MOU Signature Page'. The background is composed of several overlapping geometric shapes: a dark red triangle in the top-left corner, a light gray trapezoid in the top-right, and a dark blue trapezoid in the bottom-right. A semi-transparent orange ring surrounds the white circle, and a semi-transparent purple ring is positioned below it. The overall design is modern and professional.

# **MOU Signature Page**

# MOU Signature Page



## TITLE IB – ADULT, DISLOCATED WORKER, YOUTH

_____ Signature	_____ Printed Name
_____ Title	_____ Date
_____ Organization	

*If submitting an electronic signature, check the box below. Failure to do so will result in a rejection of the signature page.*

By checking this box, I affirm that I have followed the protocol for submitting an electronic signature as described in the Governor's Guidelines to State and Local Program Partners Negotiating Costs and Services Under the Workforce Innovation and Opportunity Act (WIOA) of 2014 and any supplemental guidance for negotiating annual costs and services under WIOA.

## INDIVIDUAL WHO NEGOTIATED THE LOCAL MOU FOR TITLE IB IF DIFFERENT THAN THE SIGNATORY ABOVE

_____ Signature	_____ Printed Name
_____ Title	_____ Date
_____ Organization	

# Questions



# QUESTIONS?



# Direct Linkage Checklist

# Direct Linkage Checklist



## IDENTIFYING INFORMATION

<b>LWIA:</b> <b>8</b>
<b>ONE-STOP CENTER ADDRESS:</b> <b>1234 SOUTH STREET</b>
<b>COMPREHENSIVE ONE-STOP CENTER NAME:</b> <b>THE WIOA CENTER</b>
<b>NAME OF PARTNER AND/OR AFFILIATED REQUIRED PROGRAM:</b> <b>YOUTHBUILD</b>
<b>CONTACT PERSON:</b> <b>JOHN SMITH</b>
<b>CONTACT PHONE NUMBER:</b> <b>217-555-5555</b>
<b>DATE OF DIRECT LINKAGE CHECKLIST COMPLETION:</b> <b>1/3/2025</b>
<b>NAME(S) &amp; TITLE(S) OF INDIVIDUALS COMPLETING THE DIRECT LINKAGE CHECKLIST:</b> <b>JOHN SMITH</b>
<b>LOCAL AREA LEAD MOU NEGOTIATOR:</b> <b>JAMES THOMAS</b>

# Direct Linkage Checklist



DIRECT LINKAGE COMPLIANCE CHECKLIST	
<b>1. DIRECT LINKAGE VIA PHONE</b>	
<i>If direct linkage via phone technology is being utilized at this center, please determine whether all of the following minimum criteria are being met. If phone linkage is not being used, please mark "N/A."</i>	
Please list the specific partner services being provided via phone-based direct linkage technology:  <b>One Stop Partners or customers can contact counselor</b>	
<p><b>Minimum Criterion 1:</b> Direct connection at the one-stop center via phone using:</p> <ul style="list-style-type: none"> <li>A specific, dedicated phone number connected directly to designated partner staff</li> </ul> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</p> <p><b>Action Necessary for Compliance if No:</b> [ ]</p>	<p><b>Support for Determination (check any that apply or explain "other" in comments):</b></p> <p><input checked="" type="checkbox"/> The current MOU accurately reflects the method of direct linkage service delivery being used at the comprehensive one-stop center in compliance with the dedicated phone number requirement (Criterion 1).</p> <p><input type="checkbox"/> The local partner is <i>currently</i> utilizing phone linkage in compliance with the dedicated phone number requirement (Criterion 1) for all appropriate customers during regular business hours.</p> <p>Please provide the phone number of the dedicated phone line being used to deliver services: [ ]</p> <p><input type="checkbox"/> Other – describe below the basis used for determination: [ ]</p> <p><b>Comments:</b> [ ]</p>

DIRECT LINKAGE COMPLIANCE CHECKLIST	
<p><b>Minimum Criterion 2:</b> Direct connection at the one-stop center via phone ensures:</p> <ul style="list-style-type: none"> <li>Phone coverage during normal business hours on all normal business days</li> </ul> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</p> <p><b>Action Necessary for Compliance if No:</b> [ ]</p>	<p><b>Support for Determination (check any that apply or explain "other" in comments):</b></p> <p><input checked="" type="checkbox"/> The current MOU accurately reflects the method of direct linkage service delivery being used at the comprehensive one-stop center in compliance with the phone coverage requirement (Criterion 2).</p> <p><input type="checkbox"/> The local partner is <i>currently</i> utilizing phone linkage in compliance with the phone coverage requirement (Criterion 2) for all appropriate customers during regular business hours.</p> <p>Please provide the name of the formal staff member providing phone coverage: [ ]</p> <p><input type="checkbox"/> Other – describe below the basis used for determination: [ ]</p> <p><b>Comments:</b> [ ]</p>
<p><b>Minimum Criterion 3:</b> Direct connection at the one-stop center via phone with:</p> <ul style="list-style-type: none"> <li>Voicemail or other capability enabling customers to leave a message if access to services via phone is unavailable at the time of contact</li> </ul> <p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</p> <p><b>Action Necessary for Compliance if No:</b> [ ]</p>	<p><b>Support for Determination (check any that apply or explain "other" in comments):</b></p> <p><input checked="" type="checkbox"/> The current MOU accurately reflects the method of direct linkage service delivery being used at the comprehensive one-stop center in compliance with the voicemail requirement (Criterion 3).</p> <p><input type="checkbox"/> The local partner is <i>currently</i> utilizing phone linkage in compliance with the voicemail requirement (Criterion 3) for all appropriate customers during regular business hours.</p> <p>Please provide any relevant details about the voicemail system being utilized, including the name of the device: [ ]</p> <p><input type="checkbox"/> Other – describe below the basis used for determination: [ ]</p>

# Direct Linkage Checklist



## INDIVIDUAL COMPLETING CHECKLIST ON BEHALF OF LOCAL PARTNER SIGNATURE(S)

*John Smith*

Signature

John Smith

Printed Name

Manager

Title

01/3/2025

Date

Youth Build

Organization



# Questions



# QUESTIONS?

# PY 2025 MOU Activity Timeline



- Utilize most recent MOU Template (Same from PY24)

Activity	Proposed Date
Final Guidance for PY25 MOU negotiations issued	<b>December 2024</b>
PY 2025 Pre-Program Year Planning form due	<b>December 31, 2024</b>
<b>PY 2025 Report of Outcomes Due (with preliminary budget and any waiver requests)</b>	<b>April 15, 2025</b>
PY 2025 Final MOU and Budgets due	<b>May 30, 2025</b>
LWIAs make any needed changes to MOUs and Budgets (based on TA Team feedback)	<b>October 2025</b>
<b>Final reviews are completed, and plans are uploaded to the IL workNet portal</b>	<b>November 2025</b>

**WIOA Implementation Documents & Updates Webpage:**  
<https://www.illinoisworknet.com/WIOA/Resources/Pages/Public-Documents.aspx>

# Questions? Comments?



**Contact KEB at (217) 789 – 0960**

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