



Memorandum of Understanding (MOU)

An overview of the currently published policy package



Discussion Points

Agenda

- MOU Basics
- MOU Required Components
- Unplanned MOU Updates
- State Funding Mechanism
- MOU-Specific Documents
- Operating Budget Documents



MOU Basics

What is it and what it includes

- An MOU is an agreement between the local workforce development board (local board) and the partners in a local one-stop delivery system
- Three Primary Components include:
 - MOU Terms and Conditions
 - Infrastructure Funding Agreement (IFA)
 - Operating Budget (OB)



MOU Basics

Defining the IFA and OB

- IFA: Each required partner must contribute based on the program's proportionate use and relative benefit received.
 - Local boards may define own methodology if it is consistent with Uniform Guidance and WIOA regulations.
- OB: The result of MOU negotiation and IFA process.
 - WIOA requires an annual PA CareerLink® OB.
 - The OB may include separate budgets for each PA CareerLink® comprehensive, affiliate, or specialized centers.



MOU Required Components

Referenced in the MOU Guide, WIOA Sec. 121(C), and 20 CFR Part 678

- List of all partners
- A description of the MOU development process
- Access to services
- **Collaborative Professional Development**
- IFA
- OB
- Methods of referral and data sharing



MOU Required Components

Continued...

- Methods ensuring needs of specific targeted populations are addressed
- MOU Time Period
- Assurances
- Signatures
- Other Provisions



Unplanned MOU Updates

- Amendment or Modification
 - Requires all MOU parties to review/agree to changed elements of MOU
 - Non-substantial changes (e.g., minor revisions to the budget or adjustments made due to annual reconciliation of the budget)
 - Due within 90 days of qualifying event



Unplanned MOU Updates

Continued...

- Substantial changes requiring a renewal
 - Requires all MOU parties to review/agree to all elements of MOU AND re-sign
 - Substantial changes (e.g., changes in one-stop partner or changes due to the election of a new CEO)
 - Due within 180 days of qualifying event



State Funding Mechanism (SFM)

- If the local board, CEO, and one-stop partners reach an impasse related to infrastructure cost funding, despite L&I's informal dispute resolution assistance, the SFM is triggered in alignment with 20 CFR 678.730.
- The SFM may be appealed if determination is inconsistent with the requirements in WIOA sec. 121(h)(2)(E).



MOU-Specific Documents

- MOU Policy
- MOU Guidance
- MOU Negotiator and Signers Contact List
- MOU Template
- MOU Negotiation and Outcome Notification
- Optional WIOA Service List
- MOU Authority and Signature Page



MOU Template

- Essentially is a sample MOU.
- Includes portions of the local MOUs and IFAs developed by the U.S. Department of Labor.
- Used as a reference guide or basic template when developing an MOU.



MOU Negotiation Outcome Notification

- This document indicates if consensus or impasse occurred.
- Must be emailed to RA-LI-PACL-FINOP@pa.gov on or before March 10th or anytime a MOU is modified.



Optional WIOA Service List

- Could be used to fulfill the required MOU component of *Access to Services*.
- Nearly all required and permissible local areas or activities are prefilled.
- For additional guidance on using this optional form, please refer to Page 4 of the MOU Guide



MOU Authority and Signature Page

- Certifies agreement and legal authority to bind their respective agency to: MOU, IFA, and OB.
- For additional instruction, please refer to Page 9 of the MOU Guide.



Operating Budget Documents

- PA CareerLink® Operating Budget Bulletin
- PA CareerLink® Operating Budget Template
- Operating Budget – Financial Status Report Template
- PA CareerLink® Staffing Survey Template



PA CareerLink® Operating Budget Bulletin

- Supplements primary OB guidance found within the MOU Guide.
- Contains information to help local boards develop the OB and complete the OB-FSRs.



PA CareerLink® Operating Budget Template

- If technical support is needed while completing this document, contact BWDA's PA CareerLink® Finance and Budget Unit's resource account at RA-LI-PACL-FINOP@pa.gov.
- For detailed guidance on preparing this template, please refer to pages 5-9 of the PA CareerLink® Operating Budget Bulletin.



Operating Budget – Financial Status Report

- The mechanism local grantees or fiscal agents are required to use when reporting actual, site specific, expenditures.
- Refer to pages 9-10 of the PA CareerLink® Operating Budget Bulletin for further requirements.



PA CareerLink® Staffing Survey Template

- A staffing survey with a current partner list, according to the survey's effective date, should be submitted with each new program year (PY) and any budget modifications.
- Refer to pages 8-9 of the PA CareerLink® Operating Budget Bulletin for further requirements.



Thank you!



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