Notice of Availability of Funds

By the Employment Development Department
On behalf of the California Labor and Workforce Development Agency

Workforce Innovation and Opportunity Act Employment Social Enterprise Program Year 2024-25

Solicitation for Proposals



December 2024

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This Employment Social Enterprise Program is funded by a grant award totaling \$10 million (100%) from the U.S. Department of Labor, with \$0 (0%) financed from non-federal sources.

ESE PY 24-25 SFP i December 2024

Proposal Package Instructions and Attachments

The following list contains the full Solicitation for Proposals (SFP) instructions and required attachments for the Employment Social Enterprise (ESE) for Program Year 2024-25 (PY 24-25) funding opportunity.

Download each attachment link individually before saving the SFP to your computer. Applicants should carefully read the SFP for the required elements and follow the Proposal Package Instructions in Appendix A to meet all proposal package requirements.

Required Attachments:

- Cover Signature Page (DOCX)
- Exhibit A Project Narrative (DOCX)
- Exhibit F Budget Summary (DOCX)
- Exhibit F2 Budget Narrative (DOCX)
- Exhibit G Supplemental Budget (if applicable) (DOCX)
- Exhibit I Project Work Plan (DOCX)
- Exhibit J Partner Roles and Responsibilities (DOCX)
- Exhibit K Performance Goals Matrix (DOCX)
- Executive Summary (DOCX)
- Indirect Cost Declaration (DOCX)
- Negotiated Indirect Cost Rate Agreement (NICRA) (if applicable) *
- Optional Commitment and Partnership Agreement Letters*

^{*}Does not include a template

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1. Overview

The Employment Development Department (EDD), in coordination with the California Labor and Workforce Development Agency (LWDA), announces the availability of up to \$10 million in *Workforce Innovation and Opportunity Act* (WIOA) Governor's Discretionary funds, made available through the Employment Social Enterprise (ESE) Program Year 2024-25 (PY 24-25) Solicitation for Proposals (SFP).

The inaugural ESE SFP was released in PY 22-23 on June 26, 2023. Building on that success, the ESE PY 24-25 grants will continue to support the design, development, and implementation of employment social enterprise¹ programs. These programs aim to enhance transitional employment services and assist individuals facing significant barriers to employment.

The ESE PY 24-25 grants will focus on promoting job training opportunities and transitional employment through social enterprise initiatives, targeting the hardest-to-serve individuals to help them achieve economic self-sufficiency and life stability.

A. Background

According to a national survey, ESEs play a vital role in creating an inclusive economy². ESEs provide viable employment opportunities for individuals facing systemic employment barriers, including:

- Newcomers and refugees: These individuals often encounter limited employment opportunities and are relegated to lower-wage jobs due to the devaluation of their credentials, lack of social capital, cultural differences, and language barriers.
- Formerly incarcerated individuals: This group faces significant challenges in finding quality employment, even more than a decade after reentering society. Many earn wages below the poverty line, while others reoffend due to exclusion from the formal economy.
- **Single mothers:** Single mothers experience considerably higher unemployment rates compared to mothers in a two-parent households. They often struggle to re-enter the workforce after childbirth and face limited access to affordable child care, a challenge exacerbated by the pandemic.
- People with disabilities who experience limited or low-skilled employment opportunities are at risk of automation due to inaccessible workplaces.

¹ Employment social enterprises (ESEs) are market-facing, revenue-generating businesses that sell goods and products and provide transitional employment and 360-degree support to people breaking through employment barriers. ESEs help people stabilize their lives, build their skills, and succeed.

² https://redf.org/wp-content/uploads/REDF-2021-National-Policy-Recommendations.pdf

According to the Toronto Enterprise Fund³, ESEs have successfully increased employee income, improved attachment to the labor market, enhanced health housing security, and helped keep people out of the criminal justice system. Quality, long-term employment transforms lives and strengthens community wealth. ESEs support individuals in stabilizing their lives, building their skills, developing work history, and achieving success.

ESE businesses also stimulate the national economy, combat multi-generational poverty, and address economic, gender, and racial disparities. Additionally, ESEs reduce taxpayer costs by decreasing rates of incarceration, recidivism, and homelessness, while also reducing reliance on safety net programs. Research shows this approach works. It leads to greater economic security and mobility for participants and provides a social return on investment of \$2.23 in benefits for every \$1.00 invested.

ESE employees represent a diverse group, including millions of individuals with histories of incarceration, homelessness, mental illness, substance abuse, and limited education. An impact study of 134 ESEs across 30 states found that nearly 70% of ESE employees were people of color (42% Black, 26% Latinx), underscoring the valuable role ESEs play in addressing racial injustice and advancing racial equity across the economy⁴. This highights the importance of developing the ESE Program and launching the second round for PY 24-25.

B. Purpose

The ESE PY 24-25 SFP invites proposals that expand on existing ESE programs or collaborate with the state's successful ESE initiatives. These programs have a proven track record of improving the lives of people who face significant barriers to employment by providing job-readiness training, vocational skills development, employment opportunities, and support for maintaining employment.

These programs will build on the success of the ESE model as the first step toward employment stability and success for the target populations, serving as a priority program intervention.

The ESE programs should continue to align with statewide efforts across multiple agencies and departments to enhance access to and retention in transitional employment through Social Enterprises (SE)⁵. These initiatives support recruitment, wrap-around services, case management, and job placement for participants in the ESE program.

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³https://socialinnovation.org/news/2021/06/20/employment-social-enterprises-breaking-it-down-so-we-can-build-the-next-economy/

⁴ https://redf.org/wp-content/uploads/REDF-2021-National-Policy-Recommendations.pdf

⁵ Social enterprises (SEs) are competitive, revenue-generating businesses with a clear social mission to

The ESE PY 24-25 SFP also seeks innovative projects that effectively provide jobs, support services, and on-the-job training to participants while generating revenue through the sale of products or services. These projects should demonstrate how they reinvest earnings into their businesses and employees by offering stable, good-paying jobs and essential support services. This approach aims to help participants overcome significant barriers to employment, fostering long-term success and stability. Through this approach, ESE programs will help participants transition into the workforce by first placing them into a supportive work environment. This approach enables participants to earn wages while gaining valuable work experience, enhancing job skills, while accessing comprehensive supportive services. These services may include wraparound support such as housing assistance, childcare access, mental health services, job coaching, and more. When participants are ready to take the next step, the ESE programs will help them find and keep their next good job⁶ and continue building on their success.

ESE programs are encouraged to propose and test innovations and work with their partners to support transitional employment, education, job training, upskilling, and placement programs, which are critical for long-term stability and success.

C. Availability

Applicants may apply for funding ranging from \$500,000 to \$2,000,000. The EDD anticipates awarding 5-20 projects. The state may choose to exceed the maximum award amount based on the availability of funds. The period of performance for projects funded under this SFP will range between 18 to 24 months, with an anticipated start date of May 2025 and an end date no later than March 31, 2027. This period of performance includes all necessary implementation and start-up activities. Grant funds will not be available for more than 24 months, and no obligation of funds will be allowed before or after the grant period of performance. Any funds not expended for budgeted grant activities during the grant agreement shall be reverted to the state.

D. Target Populations

Applicants may choose to serve population(s) based on the service area's needs, including but not limited to the individual with a barrier to employment listed and defined below.

1. **Justice-involved individuals**⁷: A justice-involved individual is defined as an adult who (a) is or has been subject to any stage of the criminal justice process and for whom services

hire and train people who are striving to overcome employment barriers including homelessness, incarceration, substance abuse, mental illness, and limited education.

⁶ Detailed information relating to the Good Jobs Champions Group definition can be found on the Aspen Institute website.

⁷ WIOA Public Law 113-128, Section 3(38)(a) and (b)

under the WIOA may be beneficial or (b) requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.

- 2. **Disconnected Young Adults⁸:** Disconnected young adults are individuals, typically between the ages of 16 and 24, who are not in school or employed and are at risk of long-term unemployment.
- 3. **Long-term-unemployed individual**⁹: Long-term unemployment refers to individuals who have been unemployed for at least six months and are seeking re-entry into the workforce.
- 4. Older workers: An "older individual" is defined as someone age 55 or older.
- 5. **People with Disabilities (PWD)**¹⁰: A person with a disability is an individual who has a physical or mental impairment that substantially limits one or more major life activities, has a record of such an impairment, or is regarded as having such an impairment.
- 6. **Veterans**¹¹: A veteran is a person who served in the active military, naval, or air service and was discharged or released under conditions other than dishonorable. Veterans may belong to one or more of the following priority groups: campaign, disabled, recently separated, veterans with significant barriers, and other covered veterans.
- 7. English Language Learners (ELL): As defined by the WIOA Title II, Section 203(7), an English language learner is a person who has limited ability in speaking, reading, writing, or understanding the English language, and (a) their native language is a language other than English, or (b) they live in a family or community environment where a language other than English is dominant.

E. Eligibility

Applicants

Eligible applicants include ESE organizations that collaborate with one or more of the following: public workforce development agencies; human service agencies; public and private non-profit

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⁸ WIOA Public Law 113-128, Section 129(a)(1)(B)

⁹ The term "unemployed individual" means an individual who is without a job and who wants and is available for work. The determination of whether an individual is without a job, for purposes of this paragraph, shall be made in accordance with the criteria used by the Bureau of Labor Statistics of the Department of Labor in defining individuals as unemployed.

¹⁰ 42 U.S.C. Section 12102 1(a)(b)(c)

¹¹ 38 U.S.C. Section 101

organizations, or a community-based organizations (CBO). Individuals are not eligible to apply. Applicants who were awarded ESE PY 23-24 funding may re-apply for funding. However, participants served through the PY 24-25 funding must consist of new individuals.

Definition of Eligible Applicants

An Employment Social Enterprise (ESE) is defined as a nonprofit or for-profit organization that meets the following:

- **Organizational Structure**: Organized as a social purpose corporation, a benefit corporation, or as a distinct entity incorporated within a larger organization.
- Mission-Driven: Demonstrates evidence of a mission to provide access to employment and social support through on-the-job training and life skills training for a direct labor force consisting of individuals with a "barrier to employment," as defined in Section 3102 of Title 29 of the United States Code, as it read on January 1, 2021.
- **Evidence-Based Practices**: Implements data-driven policies and evidence-based practices to guide procedures and measure outcomes effectively.
- Business Operations: Produces or assembles goods, provides services, or a combination of both.

Participant Requirements

- Participants must be at least 18 years old.
- Participants must meet all eligibility requirements outlined in WIOA Title I Adult Program to participate in the ESE PY 24-25 program.

Collaborative Partners

This grant program seeks innovative projects that enhance employment access and job retention for target populations leveraging ESEs in collaboration with strategic partners. Applicants are strongly encouraged to work with other ESEs, public workforce development agencies, human service agencies, and CBOs to provide comprehensive support, including education, training, case management, wrap-around services, and follow-up support.

Applicants should collaborate with organization(s) offering SE programs in the service region(s) and establish connections with workforce development system partners such as:

- Title I Local Areas in the service region(s)
- Title III Wagner-Peyser local offices in the service area

Applicants serving **veterans** are encouraged to partner with the following:

Title III Wagner-Peyser Local EDD Jobs for Veterans State Grant staff

Applicants serving justice-involved individuals are encouraged to partner with the following:

County or California Department of Corrections and Rehabilitation probation or diversion programs such as drug courts, veterans' courts, community courts, or other specialty courts, as well as the Prison to Employment initiative to strengthen linkages between the state workforce and corrections systems.

Applicants serving **PWD** are encouraged to partner with the following:

- Title IV Vocational Rehabilitation-Department of Rehabilitation
- Title III Wagner-Peyser local EDD Youth Employment Opportunity Program (YEOP) for specialization in serving youth with disabilities

Partnerships with Other ESE Employers

Applicants should develop strategic partnerships with other ESE employers to facilitate outreach and assist participants in securing competitive employment.

Efforts should focus on:

- Identifying employers willing to hire ESE participants.
- Targeting employers offering quality jobs (e.g., full-time positions with competitive wages, benefits, and career pathways).

Additional Partnerships

ESEs are well-positioned to partner with (and build) programs that develop in-demand credentials through Registered Apprenticeship Programs or industry-aligned pre-apprenticeship programs. Therefore, the state also encourages applicants to create partnerships with (i) human service programs¹²; (ii) CBOs; (iii) HRTPs; (iv) the Division of Apprenticeship Standards (DAS) or other apprenticeship initiatives; (v) Other State Plan partners; (vi) other WIOA programs; (vii) personal support provider (PSP)¹³; (viii) education and training provider(s) in the service region or same industry sector as the ESE; (ix) special grants such as the Prison to Employment 2.0 Regional Partnership (P2E 2.0); and (x) additional initiatives beyond those required by the program, whenever such additional partnerships are both feasible and relevant

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¹² Human service programs can include CalWORKs, CalFresh, CalFresh Employment and Training (E&T), Refugee Programs, and other programs under the health and human services umbrella. CalFresh E&T does not exist in all counties.

¹³ Personal support providers provide supportive services to participants to help them stay employed or engaged in education and training and incentivize participants through regular reporting and incentive payment for providing proof of employment or training.

to the project. Applicants are encouraged to articulate how these partnerships will execute program phases effectively, ensuring all collaborations align with project goals.

2. Project Design

A. Project Design Overview

Individuals with significant barriers to employment face challenges that make finding and maintaining employment seem unattainable. For these individuals, employment means more than a paycheck-it represents independence, self-confidence, and security. For employers, hiring individuals from these target populations often results in loyal employees who can enhance productivity and staff morale. However, many adults face barriers such as mental health challenges, substance use and addiction, physical or mental disabilities, lack of vocational skills or training, and long-term unemployment.

These barriers can be addressed through transitional employment offered by ESEs, which provide jobs, support services, and on-the-job training. ESEs help participants earn wages while receiving comprehensive services that support job retention.

ESE project designs must outline approaches to identify, engage, and address the barriers and needs of these target populations, providing the employment and supportive services required for success. Additionally, individuals transitioning into the workforce often struggle to secure living-wage jobs immediately. ESE projects can bridge this gap by offering work experience, skill development (both soft and hard skills), and life stability. Enabling participants to transition into unsubsidized employment with a living wage and/or a career ladder to good-quality jobs as outlined in California's Unified Strategic Workforce Development Plan 2024-2027 (State Plan). To achieve these goals, ESE applicants must design programs that include effective outreach, marketing, and inclusive retention strategies to attract and serve the target populations successfully.

B. Goals and Objectives

The ESE program places employment at the core of its strategy to transform how people with significant barriers to employment transition into the workforce. The proposed program model builds on the success of the state's mission-driven businesses focused on hiring and assisting the target populations who face barriers to employment to acquire employment stability and

https://cwdb.ca.gov/plans policies/2024-2027-state-plan/. See the High Road Training Partnerships
 and High Road Project Profiles webpages for examples of innovative projects that align with state goals.
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success by providing funding for the outreach to program participants, support and case management services, and facilitating job placement.

The ESE project will focus on recruitment, wrap-around/case management support, and career advancement to supplement business revenue generated by the social enterprise. The goals of this program should focus on building the capacity of ESEs to provide support services to participants to increase retention and success in the program. Effective projects will also expand the scale and reach of ESEs by leveraging business revenue to fund participant wages.

Applicants are encouraged to reference the **State Plan** to ensure alignment with California's workforce development objectives. The program seeks to address systemic inequities that have disproportionately impacted this grant's targeted populations. Applicants must demonstrate how their project will redirect existing resources and implement innovative approaches to effectively serve these target populations.

Successful proposals will outline how the project is replicable, scalable, and sustainable at regional or systemic levels. Additionally, applicants should describe plans to share lessons learned with workforce development boards, the Regional Planning Units (RPU), the state, and other stakeholders. This knowledge sharing will drive lasting change and improvements across the workforce development system.

C. Strategies

The ESE program strategies should foster innovation, test new approaches, and adapt best practices to equip target populations with essential work readiness skills and vocational training to prepare participants for meaningful employment. Competitive projects will focus on developing skills through ESE programs that lead to good jobs paying at least a living wage, as defined by the Massachusetts Institute of Technology (MIT) living wage standard for local regions.

To achieve these goals applicants may:

- Create new tools
- Borrow methods from other disciplines
- Apply models from other sectors or population-specific strategies to reach the desired outcomes.

Core Invention Strategies

ESE intervention strategies should include, but are not limited to, providing work experience; employment supports and services, while employed, designed to help participants sustain employment, including: (i) job-readiness skills training, job search

assistance, and career counseling; (ii) training to build vocational and/or technical skills; (iii) work supports, such as clothing, transportation, or housing assistance.

Life stability supports while employed should include: (i) financial education; (ii) food security (for example, food pantries, reduced-price meals, nutritional education); and (iii) access to public benefits and tax preparation.

Post-employment support services after leaving the ESE program should include: (i) retention support after the transition into the next good job.

To ensure the quality, effectiveness, and delivery of the projects being funded, competitive proposals should include: (i) assertive outreach, marketing, and retention plans; (ii) equal access; and (iii) the implementation of evidence-based strategies that provide a holistic suite of wrap-around support and case management with a trauma-informed approach designed to address the needs of the workers in the target population.

Through the ESE and strong collaboration with partners, the program will assess each participant's job readiness and provide customized support to foster positive job placement outcomes. This support includes interview preparation, job search assistance, resume building, computer proficiency, and strengthening communication skills, all designed to address the needs of the target population(s), which are essential elements of this program. Based on a solid outreach plan, the ESE must focus on providing transitional employment services that place individuals into employment, typically in a supportive employment environment, to help participants earn wages while preparing them for unsubsidized employment by building work experience and improving job skills. Applicants must help workers achieve sustained employment and earnings gains (toward economic self-sufficiency) and enhance quality. Employment at the ESE allows participants to build their skills and confidence in a supportive environment while earning a paycheck.

D. Supportive Services, Wrap-Around Support, and Case Management

The ESE projects will also offer a holistic suite of wrap-around support, case management, and supportive service interventions designed to address the needs of the target populations to bolster long-term employment stability. Support services may include help with childcare, housing, transportation, financial literacy, or mental health counseling. Wrap-around support and case management should have a trauma-informed approach tailored to the individual's cultural, personal, educational, and professional needs to ensure full engagement in education, credential attainment, upskilling opportunities to increase the likelihood of job placement, and retention in higher-wage jobs as well as wrap-around support that will be provided to transition participants to unsubsidized employment, higher education, or credential attainment in the future.

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Below is a list of examples of the workforce and supportive service interventions that have been successfully piloted in round one of the ESE PY 22-23 program collaborations that meet the requirements listed above:

- **Transitional Employment**: Allows participants to build their skills and confidence in a supportive environment while earning a paycheck.
- **Support Services**: Provide help with childcare, housing, transportation, financial literacy, or mental health counseling to ensure participants can remove barriers to employment.
- **Job Readiness**: Includes interview preparation, job search assistance, resume building, computer proficiency, and communication skills to foster positive job placement outcomes.
- **Competitive Employment**: Serves as the next step for participants on their pathway to economic mobility.
- **Retention Services**: Bolster long-term success, ensuring each participant receives the support they need after being placed into competitive employment.

E. Collaboration with the EDD

The EDD requires key project staff to attend mandatory meetings which may take place monthly, quarterly and/or annually. The EDD Special Initiatives Support Group is responsible for grant administration and oversight. Key project staff must work closely with the EDD team for technical assistance, CalJOBSSM training, and guidance during start-up, implementation, and the grant period of performance. Applicants must also participate in the community of practice meetings and other activities organized by external technical assistance and evaluation providers selected by the EDD to provide technical assistance and evaluate projects. See section VII.C. of the SFP for more information.

3. Application and Program Requirements

All proposals must adhere to requirements, utilize the required format, and include all requested information and attachments. Incomplete submissions will be deemed non-responsive. Proposals that do not meet the minimum requirements will not be scored or considered for funding. Refer to Appendix A for guidance on adequately completing, formatting, and submitting all elements of the proposal package.

A. Required Exhibits and Attachments

Exhibit A: Project Narrative

Exhibit F: Budget Summary

Exhibit F2: Budget Narrative

• Exhibit G: Supplemental Budget (if applicable)

• Exhibit I: Project Work Plan

• Exhibit J: Partner Roles and Responsibilities

- Exhibit K: Performance Goals Matrix
- Cover/Signature Page
- Executive Summary
- Partnership Agreement Letters and Commitment Letters
- Indirect Cost Declaration
- Negotiated Indirect Cost Rate Agreement (NICRA) (if applicable)

B. Registration with the System for Award Management (SAM)

Applicants must register with the SAM to apply for and receive funding for this initiative.

Note – SAM registration must be reviewed and updated every 12 months to keep accounts current, accurate, and complete in the SAM database. To remain eligible for funding, applicants must maintain an active registration in the SAM database. Applicants must ensure that this information is updated before applying for funding. The registration and/or renewal process can take several weeks to complete and requires privileged information, including financial and banking information, which may take time to obtain. The applicant must have all information up to date and accessible through the SAM before applying. Visit the **SAM website** for more information about registration requirements.

C. Partnership Agreement and Commitment Letters

To enhance the project, applicants must submit partnership agreement letters from any proposed partners. Any partner providing the whole or part of the leveraged resources to the program must also provide a commitment letter stating the amount of the in-kind contribution being leveraged for the project. If the applicant is one of the partners and/or provides required leveraged resources, they must provide their letter to document the commitment. See Appendix A for more information on submitting partnership agreements and commitment letters.

D. Performance Goals

Applicants can reference the state's negotiated performance goals in Figure 3. These metrics and rates of achievement are provided as a point of reference for applicants when reviewing their local goals. The state recognizes that local goals may differ from those presented here. Refer to Appendix A, State Negotiated Performance Goals PY 24 and 25 (WSIN23-54), and Local Area Negotiated Performance Goals PY 24 and 25 (WSIN21-14) (October 31, 2024) for more information about performance goals.

Figure 1: State Negotiated Performance Goals

PY 24-25 Negotiated Performance Goals	Adults
Employment Rate 2nd Quarter After Exit	67.5%
Employment Rate 4th Quarter After Exit	65.5%
Median Earnings 2nd Quarter After Exit	\$7,800
Credential Attainment within 4 Quarters After Exit	66.0%
Measurable Skill Gains	60.0%

In addition to the WIOA performance measures, the state requires subrecipients to track total participants enrolled in education, training, and employment. For this SFP, the applicant is encouraged to employ or place participants into jobs with ESEs, which will lead to long-term employment stability as measured by the program outcomes outlined below. Applicants should tailor performance goals to the project needs and employ the ESE participants with wages that meet or exceed the local MIT living wage standard. The project narrative explanation of performance goals must reflect a data-driven local/regional economic analysis that supports the proposed project performance outcomes goals.

Measurable employment and job quality outcomes outlined in the project plan should include the following:

- Number of participants who entered employment in the ESE program
- Median Earnings of participants during employment in the ESE program
- Hourly wages met or exceeded earnings compared to MIT's Living Wage during employment at the ESE or in "next step" jobs
- Average Number of hours worked during the ESE program
- ESE employment retention rates 3,6 and 12 months
- Number of Participants who received job benefits during employment
- Number of participants who transitioned into the next good job at a higher wage than ESE employment (or hourly wages that meet or exceed the local MIT Living Wage
- Number of participants who transitioned to higher education
- Number of participants who completed higher education during the grant period
- Number of participants who enrolled in credential programs
- Number of participants who received credential attainment at or above 55% during the grant period

4. Budgeting and Performance Requirements

A. Funding Request

Applicants may apply for funding of \$500,000 up to \$2,000,000 to serve the target populations. The target populations with high barriers will require more intense support and be more expensive to help; therefore, applicants may serve any number of participants but must provide a reasonable and necessary cost per participant. The average price per participant may vary based on geographic location, target population, service type, and intensity. These funds will support projects that can leverage other resources to maximize the project's impact, earn the maximum return on investment, and foster project replication and sustainability.

The EDD recognizes that new WIOA grantees need more intensive onboarding than those with previous WIOA exposure. The EDD recommends that new WIOA grantees anticipate a 2-month start-up in project timelines to understand the grant, gain full access, and train staff. Key project staff must work closely with the EDD team for technical assistance, CalJOBSSM training, and guidance during start-up, implementation, and the grant period of performance. Therefore, applicants should design a budget and program narrative with flexibility to allow for adjustments in the program and include funding for a dedicated staff to manage a WIOA grant.

B. Leveraging Funds and Resources

Applicants must demonstrate the ability to leverage resources from other sources to support the goals and objectives of this grant. Applicants must have leveraged resources equivalent to 20 percent of the grant award amount.

Leverage is not defined in regulation or any related administrative requirements. For EDD-funded programs, the term means all resources the recipient uses to support grant activity and outcomes, regardless of whether those resources meet the standards required for match. Applicants are encouraged to leverage human capital and utilize other resources to maximize the project's success. Leveraged resources can come from a variety of sources.

Leveraged resources can include non-cash or third-party in-kind contributions to share in infrastructure costs. The definition of "in-kind resources" is a contribution of non-cash resources explicitly used for project activities. Examples include but are not limited to donated personnel, services, and use of equipment or space. See Appendix A for more information on adequately documenting pledge contribution agreements.

Leveraged resources can come from various sources. All leveraged funds will be subject to the reporting requirements contained in Workforce Services Directive *Monthly and Quarterly Financial Reporting Requirements* (December 4, 2019) (WSD19-05) and Title 2 Code of Federal

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Regulations (CFR) Part 200: "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards" (Uniform Guidance), Section 200.306 Cost sharing or leveraging. 15

C. Allowable Uses of Funds

The proper and improper use of grant funds is governed by (i) the WIOA and its associated federal regulations, (ii) state and federal directives, and (iii) the Federal Office of Management and Budget (OMB) Uniform Guidance for Grants and Agreements. Refer to Appendices B, C, and D for the general requirements of these funds. Funds awarded under this SFP cannot be used to purchase real property or to construct buildings. The Title I and III service category definitions and a comprehensive list of CalJOBS activity codes, see Workforce Services Directives *CalJOBS Activity Codes* (October 10, 2024) (WSD24-05).

Please note – To prepare participants for employment and foster positive relationships with employers, staff should make participants aware of federal law requiring employers to verify employment authorization before employment and confirm a participant's consent to work documents before providing a job referral. Refer to Workforce Services Directive *Pathway to Services, Referral, and Enrollment* (WSD18-03), issued on August 18, 2018, for guidance on making services accessible to all populations.

D. Administrative Cost Limits

A maximum of 10 percent of the total requested grant amount will be allowed for administrative costs. Refer to Appendix D for the definition of administrative costs.

5. Submission

Only one proposal will be accepted from each applicant. However, an applicant may be a partner in another application. **The entire proposal must be submitted electronically by the deadline**.

A. Submission Format

Applicants must submit their proposal package via email as a compressed (or "Zipped") file to wsbsfp3@edd.ca.gov. The subject line of each application submission email must include: "[Applicant's Three Digit Initialism] ESE PY 24-25 Proposal". Example: "Subject: ABC ESE PY 24-25 Proposal". The proposal package is due by 3 p.m. on February 14, 2025.

¹⁵ All Workforce Services Directives cited in this SFP can be found on the <u>EDD website</u>.

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- Applicants must use their organization's CalJOBS initialism, if available. Applicants may assign their three-digit initialism if a CalJOBS initialism is unavailable.
- File names must not exceed 40 characters.
- Documents must be saved according to the following naming convention: "[Applicant's Three Digit Initialism] ESE PY 24-25 [Name of Document]".
- The Cover/Signature page (CovSign), Partnership Agreement Letters (PtrLtr), and Optional Commitment Letters (ComLtr) must be submitted in PDF format. All other exhibits and exhibit attachments must be submitted in Word format.
- The CovSign page must include the signature of the signatory authority on the form.
- PtrLtr and ComLtrs should be grouped by category and submitted as PDFs.
- Submit additional non-required documentation, such as data analysis, in Adobe PDF.

B. Submission Guidelines

The following chart lists the documents that must be included in the proposal file submission with the suggested naming convention for each file. Applications that do not include all the required documents listed and/or submitted after 3 p.m. on February 14, 2025, will be deemed non-responsive and automatically disqualified from being considered for funding.

Disclaimer: The exhibits have been updated for accessibility in compliance with the *Americans* with Disabilities Act.

Figure 2.1: Document Submission Guidelines

Required Documents	Naming Convention Example
Exhibit A Project Narrative (ExA)	ABC ESE PY 24-25 ExA
Exhibit F Budget Summary (ExF)	ABC ESE PY 24-25 ExF
Exhibit F2 Budget Narrative (ExF2)	ABC ESE PY 24-25 ExF2
Exhibit G Supplemental Budget (ExG)	ABC ESE PY 24-25 ExG
Exhibit I Project Work Plan (ExI)	ABC ESE PY 24-25 ExI
Exhibit J Partner Roles and Resp. (ExJ)	ABC ESE PY 24-25 ExJ
Exhibit K Performance Goals Matrix (ExK) (only Track 1)	ABC ESE PY 24-25 ExK
Cover/Signature Page (CovSign)	ABC ESE PY 24-25 CovSign
Executive Summary (ExecSum)	ABC ESE PY 24-25 ExexSum

Required Documents	Naming Convention Example
Optional Commitment Letters (ComLtr)	ABC ESE PY 24-25 ComLtr
Partnership Agreement Letters (PartLtr)	ABC ESE PY 24-25 PartLtr
Indirect Cost Declaration-ICD or CAP (if applicable)	ABC ESE PY 24-25 ICD
Indirect cost Rate Agreement ICRA or CAP (if applicable)	ABC ESE PY 24-25 ICRA

Figure 2.2: Application Timeline

Event	Date
SFP release	December 27, 2024
Last date to submit questions for the webinar	January 10, 2025
Deadline to preregister for the webinar	January 14, 2025, at 9 a.m. PST
Informational Webinar	January 14, 2025, at 10 a.m. PST
Notice of Intent to Apply	January 21, 2025, by noon PST
Proposals due	February 14, 2025, by 3 p.m. PST
Estimated proposal review and evaluation	February 24, 2025-February 28, 2025
Estimated deadline to appeal	February 26, 2025
Estimated award announcements	April 2025
Estimated project start date	May 1, 2025-May 31, 2025

Note – All dates after the final proposal submission deadline are approximate and may be adjusted as conditions dictate without an addendum to this SFP.

C. Questions and Answers

An informational webinar to review application requirements and answer questions is scheduled for January 14, 2025, at 10 a.m. PST. The webinar will be the final opportunity for applicants to ask specific questions regarding the SFP and the application process. Preregistration is required for all participants. Refer to the EDD's Workforce Development Solicitation for Proposals website for the preregistration link. To complete the preregistration, an applicant must fill out the pre-registration information. After successfully preregistering, a system-generated email will provide the webinar link.

Before submitting questions, applicants must thoroughly review the SFP Proposal Package Instructions in Appendix A: Proposal Package Instructions. Email inquiries for the webinar to WSBSFP3@edd.ca.gov with the subject line: "[Applicant's Initialism] ESE PY 24-25 SFP Inquiry". All inquiries must be received before 9 a.m. PST on January 10, 2025.

Please note this webinar will not be recorded. All registered attendees will receive a content summary via email following the webinar. After the informational webinar, a cumulative list of

all questions and answers received during the solicitation process will be posted to the EDD website as soon as possible.

D. Delivery

Applicants must submit a complete proposal package with all required elements to wsbsfp3@edd.ca.gov by February 14, 2025, at 3 p.m. PT. Refer to Appendix A for further guidelines on electronic submission and IV. D. Agreement, as well as the signatory authority requirements for the Subgrant Agreement (contract).

6. Award and Contracting Process

After the deadline, the EDD will (i) vet the proposals based on the minimum qualifications established in this SFP and (ii) administer a competitive evaluation for all proposals that meet the minimum qualifications. Funding decisions are based on scoring criteria, performance history, and regional and target population needs. The EDD will notify all applicants regarding the status of submitted proposals. A summary of projects funded under this SFP will be publicly posted on the EDD website.

A. Proposal Review, Scoring, and Evaluation

Teams of reviewers will score, and rank proposals based on the criteria outlined in this SFP; for those organizations that have participated in past grant programs administered by the EDD's Workforce Services Branch (WSB), past and present performance will be considered when making funding decisions. An example of the scoring value of each section of the SFP is as follows:

Figure 3: Scoring Rubric

Narrative Criteria	Maximum
	Points
Section 1 – Statement of Need	20
Section 2 – Project Plan	20
Section 3 – Performance Goals	15
Section 4 – Partnerships and Leveraged Resources	10
Section 5 – Statement of Capabilities	20
Section 6 – Budget Summary Narrative and Plan	15
Minimum and Other Requirements Total Maximum	100

Only proposals that score in the top tier, are deemed meritorious, and are in the state's best interest will be recommended for funding. The EDD reserves the right to conduct on-site reviews before making final funding recommendations. After completion of the evaluation process, the EDD Director will receive the funding recommendations. The LWDA Secretary, in consultation with the EDD, will make final funding decisions based on the ranked scores and other factors such as the distribution of funds across geographic locations and special populations in need, past performance, innovative approach, and uniqueness of the project.

B. Appeals Process

A proposal may be disqualified for not meeting the application requirements. Please read the SFP carefully and consult *Appendix A: Proposal Package Instructions* for detailed instructions on adequately completing and submitting all application elements to ensure all applicable requirements have been met.

Disqualification decisions can be appealed, but disqualifications can only be overturned in specific instances. Please take into consideration the following:

- There is no appeal process for not meeting the proposal submission deadline.
- Final funding decisions cannot be appealed.
- The application requirements are those conditions that must be met for the proposal to be forwarded for evaluation and scoring. See Section IV: Funding and Budgetary Requirements, Section V: Submission, Section VI: Award, and Appendix A: Proposal Package Instructions for more information on application and submission requirements.

The EDD will distribute disqualification letters to applicants by email. Applicants have seven calendar days from the date their disqualification email is emailed in which to appeal. Please send all appeals to <a href="https://www.wsbstps.com/wsb

- Appealing organization's full name, address, and telephone number.
- A brief statement of the reasons for the appeal, including citations from the SFP and other pertinent documents.
- A statement of the relief sought.
- All corrective documentation.
- A scanned copy of the statement with the original wet signature of the authorized signatory authority for the applicant organization.

Appeals must be submitted in PDF form to <u>WSBSFP3@edd.ca.gov</u>. The EDD will respond
to all appeals via email. The review of each appeal will be limited to determining
whether the applicant's corrective actions successfully addressed the nonresponsiveness indicated in their disqualification letter and whether the proposal now
meets the minimum application requirements relayed by the SFP to be evaluated.

C. Award Notification

Awards will be announced on the EDD website, and applicants will be notified of the funding decisions. Award decision notices are anticipated to be made in April 2025. An award offer does not constitute approval of the application as submitted. The applicant must negotiate with the EDD to finalize program components, staffing levels, budget elements, and administrative systems to support grant implementation. If the negotiations do not result in a mutually acceptable submission, the EDD reserves the right to terminate negotiations and decline to fund the application.

D. Agreement and Contracting

The EDD will contact the subrecipients to finalize the Subgrant Agreement details. The EDD may request that the agreements incorporate changes to the original project proposals. After all exhibits are finalized, the awardee will officially enter a subgrant agreement with EDD to provide the services and serve the number of participants listed in the agreement for the amount awarded. Any unauthorized deviation or non-responsiveness may be grounds for breach of contract with legal repercussions. Please ensure that your organization's goals and objectives are feasible and reasonable and that your infrastructure supports the administrative and operational requirements. The state expects negotiations to begin immediately after providing official award notices. A Notice of Award does not automatically entitle the subrecipient to funding. The EDD reserves the right to terminate any funding offer if a subrecipient does not negotiate in good faith. Subrecipients are advised to consider whether official action by a County Board of Supervisors, City Council, or other similar decision-making body will be necessary before accepting funds awarded under this SFP. The time needed for such official action will affect the subrecipient's ability to meet the project terms and conditions and the projected work plan.

All projects selected for funding are contingent upon the revision and approval of the exhibits. Project exhibits are not automatically approved. Subrecipients may be required to revise the project exhibits to comply with federal and state mandates during the approval and negotiation. The Special Initiatives Support Group will guide the finalization of the exhibits and verify that all requirements are met to be incorporated into the official Subgrant Agreement. The subrecipients must submit a resolution for signatory authority designating the position having the authority to sign for the organization. The EDD reserves the right to rescind any funding

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offer if a subrecipient does not comply with the revision process and the terms of the Subgrant Agreement.

7. Administrative Requirements

To qualify for awarded funds, successful applicants must comply with all administrative and reporting requirements. Applicants who do not comply may be de-obligated. Refer to *Unilateral De-Obligation* (WSD16-03) (July 20, 2016) for guidance.

A. Monitoring and Audits

During the period of performance, subrecipients will be monitored and/or audited by the state in accordance with existing policies, procedures, and EDD guidance to clarify requirements governing the use of WIOA funds. Subrecipients are expected to be responsive to all reviewers' requests, provide reasonable and timely access to records and staff, facilitate access to subcontractors, and communicate with reviewers in a timely manner. Complete and accurate reporting is essential during the monitoring process. Subrecipients that expend over \$750,000 in federal funds from any source must complete a single or program-specific audit for the fiscal year per the Single Audit Act for State and Local Agencies, 1996 Amendments, Public Law 104-156. Refer to *Audit Requirements* (WSD20-03) (October 13, 2020) for more information.

B. Record Retention

Subrecipients must maintain sufficient project and fiscal records to allow federal, state, and local reviewers to evaluate the project's effectiveness and proper use of funds. The record-keeping system must include both original and summary (computer-generated) data sources. Subrecipients will retain all records pertinent to the contract for five years from the date of the final payment of the contract unless a more extended period of record retention is stipulated.

C. Reporting

All subrecipients must have access to the CalJOBS website to report expenditures, participant information, and outcome data to the state promptly and accurately. Refer to Appendix F: CalJOBS Workstation and Software Requirements for more details. The state will provide training on how to use the CalJOBS reporting system. Review Types of Work-Based Learning WIOA Desk References and CalJOBS Activity Codes (WSD24-05) (October 10,2024) for guidance on entering grant activity codes. See CalJOBS Participant Reporting (WSD20-10) (April 8, 2021) for more information regarding participant reporting requirements.

Subrecipients will be required to submit monthly financial and participant reports using CalJOBS. Subrecipients will also be required to submit narrative progress reports on the status of the projects, which is a condition of the Subgrant Agreement. Failure to properly report may result in cash hold and de-obligation. Refer to *Monthly and Quarterly Financial Reporting Requirements* (WSD19-05) (December 4, 2019) for further information.

D. Closeout

Project closeout reports are due within 60 days of the project termination date. Applicants should include costs associated with closeout activities in the budget plan. Refer to WIOA Closeout Requirements (WSD16-05) (July 29, 2016) for further guidance.

E. Compliance

All funds are subject to state and federal statutory and regulatory requirements, including the WIOA and its associated federal regulations, OMB Circulars, Title 29 of the *Code of Federal Regulations*, and compliance with the Subgrant Agreement.

F. Intellectual Property Rights/Creative Common Attribution License

Subrecipients of a federal award obtain the title to intangible property once acquired. The subrecipient must use the property for the authorized initial purpose and must not encumber the property without approval from the EDD. Further, the DOL has the right to obtain, reproduce, publish, or otherwise use the data produced under a federal award and authorize others to receive, reproduce, publish, or otherwise use such data for federal purposes (Uniform Guidance Section 200.315[a], [d]). In addition, the DOL requires intellectual property developed under a competitive federal award process to be licensed under a Creative Commons Attribution license. This license allows subsequent users to copy, distribute, transmit, and adapt the copyrighted work and requires such users to attribute the work as specified by the recipient (DOL Exceptions 2 CFR Section 2900.13). Refer to *Property – Purchasing, Inventory, and Disposal* (WSD16-10) (November 10, 2016) for more information.

G. Public Communications – Certain Information Requirement

Pursuant to P.L. 117-103, Division H, Title V, Section 505, when issuing statements, press releases, requests for proposals, bid solicitations, and other documents describing projects or programs funded in whole or in part with federal money, all non-Federal entities receiving federal funds shall clearly state:

 The percentage of the total costs of the program or project which will be financed with federal money.

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- The dollar amount of federal funds for the project or program.
- The percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources.

The requirements of this term are separate from those in 2 CFR Part 200, and, when applicable, both must be complied with.

H. Evaluation

The WIOA Sections 134 and 136 (e) provide for the ongoing evaluation of workforce development activities. A statewide activities assessment allows the state to determine the effectiveness of the Governor's Discretionary Funds in addressing identified statewide needs. As a result, the state may pursue a statewide evaluation of the projects awarded through this SFP. If a statewide assessment occurs, the subrecipient must participate by providing the requested data and information. Therefore, throughout the period of performance, subrecipients must document lessons learned and effective practices ascertained through this project and share them through the QPR medium.

Appendix A: Proposal Package Instructions

Applicants must follow the instructions below and complete all requested exhibits in the SFP announcement. The Cover/Signature Page, Executive Summary, Project Narrative, and all Exhibits must be completed in Calibri 12-point font. The Cover/Signature Page, Executive Summary, required exhibits, mandatory partnership agreement letters, match commitment letters, and optional letters of support are not included in the 15-page limit, which applies only to the narrative. After carefully reviewing the SFP and Appendices, questions regarding the proposal package can be emailed to the EDD staff at WSBSFP3@edd.ca.gov.

A. Format and Document Order

Figure A.1 below lists the SFP Exhibits and Exhibit Attachments required by the applicant to download and complete according to the instructions in the SFP and submit following the naming conventions guidelines by the deadline outlined in the SFP will be deemed non-responsive and disqualified to forward for funding consideration. The list may also be used as a checklist to help ensure a complete SFP application package submission.

Figure A.1: Required Document Format Checklist

Required SFP Exhibits	
1.1 Exhibit A: Project Narrative-ExA (must use word template including all required sections and sub-sections)	
2. Exhibit F: Budget Summary-ExF (must use word template)	
3. Exhibit F2: Budget Narrative- ExF (must use word template)	
4. Exhibit G: Supplemental Budget-ExG (if applicable) (must use word template)	
5. Exhibit I: Project Work Plan-ExI (must use word template)	
6. Exhibit J: Partner Roles and Responsibilities-ExJ (must use word template)	
7. Exhibit K: Performance Goals Matrix-ExK (must use word template)	

Required SFP Exhibit Attachments	
8. Cover/Signature Page-CovSign (must use word template and submit in PDF format. Include authorized signatory's e-signature)	
8. Executive Summary-ExeSum (must use word template)	
9. Optional Commitment Letters-ComLtr (Provide a PDF version if the applicant or any partner(s) are providing leveraged resources)	
10. Partnership Agreement Letters-PartLtr (Must provide a PDF version if	
collaborations and strategic partnerships are established in the proposal)	
11. Indirect Cost Declaration-ICD (must complete the word version provided in the SFP signed by the authorized signatory)	
12. Indirect Cost Rate Agreement (ICRA) or Cost Allocation Plan (CAP) (if applicable)- If	
an applicant indicates that they are using an ICRA or CAP, they must include the ICRA	
approved by the Cognizant/Approving Agency OR attach a Cost Allocation Plan with a certification letter.	

B. SFP Exhibit Instructions

Complete only the required information in the exhibits. Do not change or alter the exhibits. Submit all exhibits as Microsoft Word documents with the following title: "[Applicant Initialism] ESE PY 24-25[Exhibit]". For example, "XYZ ESE PY 24-25 ExF" for Exhibit F. File names must not exceed 40 characters. Disclaimer: The exhibits have been formatted for accessibility in compliance with the Americans with Disabilities Act. Exhibits must be completed in the format provided.

Exhibit A - Project Narrative (ExA)

The applicant should demonstrate in the Project Narrative how the applicant's project plan will lead to the success of the target population. The entire Project Narrative must be written in MS Word using Calibri 12-point font, **limited to 15 pages.** Anything beyond the 15-page limit will not be considered. The other required exhibits and attachments do not count toward the page limit. Save this document according to the following naming convention: "[Applicant Initialism] ESE PY 24-25 [Exhibit]". For example, "XYZ ESE PY 24-25 Ex A". File names must not exceed 40 characters.

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The **Project Narrative** must include the following six sections in the following order as indicated in Exhibit A:

- 1. Statement of Need (20 points)
- 2. Project Plan (20 points)
- 3. Performance Goals (15 points)
- 4. Partnerships and Leveraged Resources (10 points)
- 5. Statement of Capabilities (20 points)
- 6. Budget Summary Narrative and Plan (15 points)

Applicants must cite supporting data as applicable for each section to be considered complete. Relevant data sources may include (i) the EDD Labor Market Information Division (LMID), (ii) the Bureau of Labor Statistics, (iii) the U.S. Census, (iv) local surveys, (v) case studies, (vi) past performance; and (vii) consultation with industry associations, Local Areas, or mandatory and non-mandatory partners. The data should:

- Reflect on the applicant's comprehensive understanding of the issues specific to the workforce system
- Demonstrate the need for the proposed project
- Justify the project's approach
- Suggest the potential for success

The narrative must be organized as follows: include the Section and Sub-Section header indicated in bold and must directly address the bulleted prompts. Each section will be reviewed and scored individually for content according to the instructions below.

Exhibit A – Project Narrative

Section I – Statement of Need (Maximum 20 points)

- **I.1. Target Region** (Score Range 0–5 points)
 - Describe the target region(s), including an estimated number of the target population(s) in the area(s).
 - Describe the unmet needs of the target population(s), including gaps in services.
 - Explain how the unmet need was determined and what factors contributed to the unmet need.
 - Provide supporting data and sources.

I.2. Target Group Description (Score range 0–10 points)

- Describe the characteristics of the target population(s).
- Describe common and significant barriers to employment, training, and services.
- Identify and describe the supportive service needs.
- Describe basic and occupational skills gaps and needs.
- Provide a clear strategy to address skills gaps and improve the labor market and skills outcomes.
- Discuss current challenges with employment and retention and how the project will address them.
- Provide a clear justification for the project, including qualitative and quantitative evidence, to explain how existing gaps in services currently provided to the target population(s) will be addressed.
- Cite data sources.

I.3. Targeted ESE (Score Range 0-5 points)

- Describe the ESE where participants will be trained and placed.
- Indicate the criteria that qualify the target occupations as good quality jobs (as defined on page 1 of the SFP).
- Demonstrate the demand for skilled workers in the target industries in the service region, including how the demand was determined.
- Describe the current and projected employment opportunities in the targeted industry sector(s) and geographic service region, including a forecast of the approximate number of jobs available in the target industries.
- Describe the business plan for the ESE, which goods and services will be provided and how the revenue will be tracked.
- Assess the individual skill levels of the demographic population and compare the skills needed by the industry sector(s) that justify the project's recruitment, training, and employment strategies.
- Provide wage data for specific occupation(s) based on the MIT living wage standard.

Section II – Project Plan (Maximum 20 points)

II.1. Outreach/Recruitment (Score range 0–5 points)

- Identify the culturally relevant outreach and recruitment methods specific to the target population(s) that will be used to recruit program participants.
- Describe the outcomes and lessons learned if the organization or other agency has used this project's outreach and recruitment methods.
- Explain how these outreach methods will ensure equity goals are met.
- Demonstrate how these methods will reach a significant percentage of the target population(s) in a replicable, effective, and timely manner.

II.2. Planned Service Approach (Score range 0–5 points)

- Complete and attach the Project Work Plan (Exhibit I).
- Describe the project work plan and how the objectives, activities, outcomes, and milestones will be achieved.
- Demonstrate how the approach addresses the challenges in the Statement of Need.
- Indicate what best practices will be applied and how building upon them will result in an innovative new approach.
- Describe the services and training used to achieve the planned goals and objectives.
- Describe how the service delivery plan will address the barriers to the target population(s), transition participants into employment, and/or help participants achieve ongoing career advancement and sustainability.
- Demonstrate how services and training will enable participants to increase their vocational and job readiness skills, attain and retain employment, enter career pathways, and advance in the target industries.
- Describe how the project will strengthen collaboration, support co-enrollment, provide clear pathways to employment, and provide support and follow-up services to ensure participant success.
- Explain how the project is replicable, scalable, and sustainable at the regional or systemic level.

II.3. Job Readiness and Transitional Employment Training (Score range 0–5 points)

- Demonstrate a central approach for providing required job skills and one or more certified training and work-based learning (WBL) programs during transitional employment to prepare participants for good quality unsubsidized jobs in the demand sector in their region.
- Demonstrate a strategy to utilize or develop pre-apprenticeship, apprenticeships, paid work experience (PWEX), or other WBLs to train for unsubsidized employment.
- Demonstrate that the approach to providing job skills and certified training and WBL programs balances participant and community needs with those of employers.
- Demonstrate how you will provide transitional employment training, including work readiness training delivered through classes and on-the-job training and accompanying work-readiness assessments.
- Demonstrate that the proposed strategy seeks to build the infrastructure necessary to support future WBL, certified training, or job readiness training programs.
- Demonstrate that the technical or occupational skills targeted in this project are based on standards developed or endorsed by the target industries and/or employers.
- Explain how this strategy will enable participants to obtain employment in a career pathway that offers career mobility and living wages.

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II.4. Supportive Services and Wrap-Around Support (Score range 0–5 points)

- Explain the strategy to develop capabilities and increase access to training by focusing on target population-specific outreach, staff development, policy development, barrier removal, and intensive case management services.
- Demonstrate a strong collaboration, strategic co-enrollment, equal access, and the implementation of evidence-based strategies that offer a holistic suite of wrap-around support, case management, and supportive service interventions designed to address the needs of the target population(s).
- Demonstrate an approach to provide wrap-around support and case management with a trauma-informed approach tailored to the individual's cultural, personal, educational, and professional needs to ensure full engagement in education, credential attainment, upskilling opportunities that increase the likelihood of job placement and retention in higher wage jobs.
- Explain the type of wrap-around support and case management that will enable
 participants to focus on learning opportunities. Examples can include but are not limited
 to providing assessments, access to career navigation training, customized occupational
 skills training, finding employment opportunities with career ladders, and childcare
 subsidies.
- Explain the type of pay-for-support services and wrap-around support that will be provided to transition participants to unsubsidized employment or training.

Section III – Performance Goals (Maximum 15 Points)

III.1. Performance Goals Matrix (Score range 0–5 points)

- Describe program outcomes for participants in ESE programs to include:
- Number of participants who entered employment in the ESE program.
- Median Earnings of participants during employment in the ESE program.
- Hourly wages met or exceeded earnings compared to MIT's Living Wage during employment at the ESE or in "next step" jobs.
- Average Number of hours worked during the ESE program.
- ESE employment retention rates 3,6 and 12 months.
- Number of Participants who received job benefits during employment.
- Number of participants who transitioned into the next good job at a higher wage than ESE employment (or hourly wages that meet or exceed the local MIT Living Wage.
- Number of participants who transitioned to higher education.
- Number of participants who completed higher education during the grant period.
- Number of participants who enrolled in credential programs.
- Number of participants who received credential attainment at or above 55% during the grant period.

III.1. Performance Goal Measurements (Score range 0–5 points)

- Describe all planned goals, including participant access to transitional employment services that place individuals into subsidized employment to help them earn wages while preparing them for unsubsidized employment.
- Describe goals for providing one or more training programs that lead to an industryrecognized certification and/or prepare participants for good quality jobs in demand sectors in their region.
- Describe the goals of placing SE employment at the heart of the program strategy to transform how the target population can transition into the workforce.
- Describe goals to provide ESE strategies to hire and assist the target population in acquiring employment stability and success through outreach to program participants, support and case management services, and job placement into unsubsidized jobs.
- Describe goals to build the capacity of ESEs to provide support services to participants to increase retention and success in the program.
- Describe the goals to expand the scale and reach of the ESEs by leveraging business revenue to cover the wages of the participants in the program.

III.2. Performance Goal Effectiveness (Score range 0–5 points)

- Identify and describe anticipated employment and job quality outcomes in the indemand sectors and among the target population(s).
- Describe how the project goals will be measured.
- Provide a baseline to demonstrate the project's impact on the target population(s).
- If a baseline does not exist, state when a baseline measurement will be taken for the project (must have one).
- Describe how the identified outcomes will result in sustained, meaningful partnerships to increase long-term employment with living wages for the target population(s) and create systemic change.
- Describe the data-driven local/regional economic analysis that supports the proposed project performance goals concerning service delivery, target populations, and skill attainment.

Section IV – Partnerships and Leveraged Resources (Maximum 10 points)

IV.1. Partner Roles and Responsibilities (Score range 0–5 points)

- Complete and attach the Partner Roles and Responsibilities (Exhibit J).
- Describe how regional partnerships have been or will be successfully formed with each mandatory partner and other partners or partner agencies committed to good quality job outcomes for participants.

- Explain how partnerships will be used to coordinate and provide services.
- Describe the roles and responsibilities of each mandatory and optional partner in terms of specific tasks, services, or support that will be provided.
- Understanding changing situations, provide a brief statement that ensures a contingency plan to ensure project success (meeting goals) in case any partnerships drop or do not come through during the performance period.

See exhibit instructions below for detailed information on completing Exhibit J and partnership agreement letters.

IV.2. ESE Outreach and Engagement (Score range 0–5 points)

- Describe how the SE employer will be identified and incorporated in developing the sector strategy approach and each project plan part.
- Describe how non-ESE providers will develop strategic partnerships with SE employers to provide outreach and assist with placement needs.
- Describe how the project will identify employers willing and able to work with (the many barriers of) ESE participants.
- Describe the outreach and engagement strategies for seeking out SE employers who
 provide good jobs, such as those that are full-time, pay high wages (including benefits),
 have a long or indefinite duration, and/or are in occupations with the possibility of
 advancement.
- Describe how ESEs will support participants to transition into permanent employment.
- Describe the track record of the ESE in generating revenue to cover participants wages.

Section V – Statement of Capabilities (Maximum 20 points)

V.1. Capability and Knowledge (Score range 0–10 points)

- Demonstrate or identify opportunities to expand capabilities and knowledge in conducting and administering programs for the target population(s).
- Identify opportunities to use new approaches to serve the target population through new partnerships, staff development, and targeted outreach.
- Demonstrate capacity to collect and report financial and participant performance data as required per the SFP.
- Describe past or present projects that prepared participants for good jobs and how grant funds will build on these experiences.
- Include planned/actual number served, planned/actual placed into employment, planned/actual number trained, types of employment, or other pertinent information relevant to the success of this project.
- Describe past success in preparing participants for good-quality jobs defined in the SFP. Provide concrete performance outcomes.
- If the organization has limited experience and/or capacity, describe how past or current partnerships with higher capacity, more experienced agencies satisfy the requirements in this section.

V.2. Staffing and Organizational Capacity (Score range 0–10 points)

- Describe the organizational infrastructure and capacity that demonstrates the ability to provide services to the target population(s).
- Include the staff's ability to run businesses for financial viability.
- Include the proposed staffing plan for this project and detail staff experience working with the target population(s) in the identified capacity.
- List and describe all key positions that will carry out the project.
- Provide an organizational structure to show the team's competency and ability to meet the administrative requirements of the SFP.
- If staff is not currently identified, describe the process of identifying, hiring, or appointing key staff, the timeline, and the training provided during the project start-up period.
- Describe the organization's capacity to lead all mandatory and optional partners.
- Describe your organization's experience with or training in diversity, equity, and inclusion practices.

Section VI- Budget Summary Narrative and Plan (Maximum 15 Points)

VI.1. Budget Plan (Score range 0–10 points)

- Complete and attach the Budget Summary (Exhibit F).
- If applicable, complete and attach the Supplemental Budget (Exhibit G).
- Explain how the proposed costs are necessary and reasonable regarding benefits to participants.
- Demonstrate that most project costs are allocated to providing or connecting to existing certified training and WBL activities, as well as wrap-around support and case management for the benefit of the participants served.
- Demonstrate that the project can leverage other resources to maximize the impact of the project, earn the maximum return on investment, and foster project replication and sustainability.
- Demonstrate a minimum of 20 percent leverage funds or services from other sources based on the total grant funding requested.
- Explain how the project will braid funds, leverage human capital, and utilize other resources to maximize the project's success.
- Explain the variety of sources, including, but not limited to, businesses, industry associations, labor organizations, CBOs, education and training providers, and/or federal, state, and local government programs that the project will leverage.
- Explain how other WIOA funds will be leveraged within the project's scope of allowable activities of those funds.

See exhibit instructions below for detailed information on completing Exhibits F and G.

VI.2. Budget Cost Effectiveness (Score range 0–5 points)

- Complete and attach the Budget Narrative (Exhibit F2).
- The figures in Exhibit F2 must align with Exhibit F.
- The narrative clearly explains all line items in the Budget Summary (Exhibit F).
- Demonstrate that assigned personnel funded by the project has adequate time and resources to achieve project goals and outcomes.
- Identify travel costs for key project staff to attend mandatory quarterly meetings, communities of practice, and other activities planned by the approved TA provider.
- If applicable, provide a detailed narrative justification for purchases and/or contracted items in the Supplemental Budget (Exhibit G) and how they will support the project's goals.
- Explain how the proposed costs are necessary and reasonable regarding benefits to participants.
- Explain how the budget will provide cohort-based training, WBL, wrap support, and case management through partnerships and leveraging funds.

See exhibit instructions below for detailed information on how to complete Exhibit F2.

Exhibit F – Budget Summary (ExF)

- The Total Project Budget column includes calculated fields that must be populated. Once all data is entered, right-click inside each field and select "Update Field" to populate each line item—complete Total Funding using the same steps.
- Program Costs and Administrative Costs must add up to the total award amount.
- Under Amount Leveraged, enter the amount identified in the *Project Narrative (Exhibit A)* and documented in commitment letters.
- The amounts entered for Total Funding in the *Budget Summary Plan (Exhibit F)* must match those listed on the Cover/ Signature page.
- If the applicant plans to purchase equipment with a unit cost of \$5,000 or more and a useful life span of more than one year, the *Supplemental Budget (Exhibit G), Section I.* Equipment must be completed.
- If an applicant plans to sub-award funds to sub-recipients to carry out a portion of the grant services, Sections II (subrecipient) and III (Contractor) of the Supplemental Budget (Exhibit G) must be completed.
- If an applicant plans to contract a vendor, dealer, distributor, merchant, or other seller providing goods or services, the *Supplemental Budget (Exhibit G)* must be completed.

Exhibit F Budget Summary must be submitted in MS Word format. Save this document according to the naming convention: "XYZ ESE PY 24-25 ExF."

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Exhibit F2 – Budget Narrative (ExF2)

- Provide a detailed justification in the Budget Narrative (Exhibit F2) for each line-item
 cost in the Budget Summary Plan (Exhibit F). For example, a thorough rationale for staff
 salaries should include each title or position, a narrative of the staff roles,
 responsibilities, activities, annual salary, the percentage of staff time devoted to the
 project, and the corresponding portion of their salary charged to the grant.
- All explanations should include how the proposed costs are necessary and reasonable regarding their benefit to participants.
- In Sections A-D: Staff Salaries, enter the total dollar amount of the Salaries Paid and Benefits Charged to the grant in the line provided.
- Utilize Line Items A-D from the Budget Summary Plan (Exhibit F) to complete the table in Section A of the Budget Narrative (Exhibit F2).
- In Column 1, list each staff position.
- In Column 2, multiply the number of full-time equivalents (FTE) by the monthly salary, then multiply the product by the amount of staff time devoted to the project (FTE x Monthly Salary x Time).
- In Column 3, enter the staff Fringe Benefit cost.
- In Column 4, calculate the Total by adding the product listed in Column 2 (FTE x Monthly Salary x Time) to the Fringe Benefits. Provide details of Line Items A-D below the table.
- In Section E, enter the estimated total Staff Travel expenses on the line provided.

 Provide details of staff travel expenses. Award recipients and critical staff must attend quarterly meetings, CoP, and other activities coordinated by EDD-approved TA providers; all travel costs are included in the budget.
- In Section F, enter the Operating Expenses on the line provided. In the table, list the dollar amount under Cost in Column 2 of the items listed in Column 1 (the items in Column 1 marked with an asterisk are based on the FTE for program staff).
- In Section G, enter the total cost of furniture and equipment on the provided line. Refer to EDD Directives WSD16-16, Subject: Allowable Costs and Prior Written Approval (February 21, 2017), WSD16-10, Subject: Property Purchasing, Inventory, and Disposal (November 10, 2016), and WSD17-08, Subject: Procurement of Equipment and Related Services (March 14, 2018) for Procurement Guidelines.
- In Line Item 1, enter the total expenditure for Equipment and Furniture items that cost less than \$5,000 per unit. Indicate whether the items will be leased or purchased and include a cost allocation. In the indicated space, include the name, cost, and quantity of the items to be purchased.
- In Line Item 2, enter the total expenditure for Equipment and Furniture items that cost more than \$5,000. Include the item's name, cost, and quantity in the indicated space if any items are listed in Section G.2. Complete Exhibit G.

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- In In-Line Item 3, provide the estimated Equipment Lease dollar amount. Explain the calculation below the line item.
- In Section H (if applicable), include the total cost of Contractual Services (Section III of Supplemental Budget, Exhibit G) on the line provided. Describe in detail.
- In Section I (if applicable), enter the total Indirect Costs on the line provided. The Indirect Cost Rate must be negotiated and approved by a Cognizant Agency, per Appendices III through VII of Uniform Guidance, 2CFR200.
- In Section J, list other expenses. Describe in detail the additional costs that do not fit into the specific categories in the prior sections. Specify whether an expense is for an Administrative or Program. Enter the estimated total of Administrative and Program expenses on the line provided.

Exhibit F2 Budget Narrative must be submitted in MS Word format. Save this document according to the naming convention: "XYZ ESE PY 24-25 ExF2."

Exhibit G – Supplemental Budget (ExG)

Exhibit G – Supplemental Budget, Section I: Equipment

- If the applicant plans to purchase equipment with a unit cost of \$5,000 or more and a useful life span of more than one year, Section I: Equipment of the Supplemental Budget (Exhibit G) must be completed.
- Due to the short-term nature of these projects, the purchase of high-cost equipment is discouraged. Instead, rental or leasing options should be explored if high-cost equipment is essential to the project's operation. All equipment with a unit cost of \$5,000 or more is subject to prior approval by the EDD and will be negotiated with contract completion.
- A separate request to purchase equipment must be submitted to the EDD for approval.
 See Basic Considerations in OMB Uniform Guidance Section 200.407. Refer to EDD Directives WSD16-16, Subject: Allowable Costs and Prior Written Approval (February 21, 2017), WSD16-10, Subject: Property Purchasing, Inventory, and Disposal (November 10, 2016), and WSD17-08, Subject: Procurement of Equipment and Related Services (March 14, 2018) for Procurement Guidelines.
- The Item Description Column must list all equipment costing \$5,000 or more.
- The Quantity Column must contain the desired amount for each item in the Item Description Column.
- The Cost Per Item Column must contain the cost for each item listed in the Item Description Column.
- Right-click each cell in the Total Cost Column and select "Update Field" to populate the total cost for each item listed in the Item Description Column.

- The Percent Charged to Project Column must be manually calculated. If the percentage sign is deleted, it must be re-entered manually to ensure an accurate calculation in the following column, the Total Cost Charged to Project Column.
- To populate the Total Cost Charged to Project Column, right-click each cell and select "Update Field."
- To populate the Total cells in the final row of Columns 3 and 5, right-click on each cell and select "Update Field."
- Disclaimer: Project operators must follow applicable procurement requirements

Exhibit G – Supplemental Budget, Section 2: Subrecipient

- If an applicant plans to award and fund a subrecipient to carry out a portion of the grant services, Section II: Subrecipients of the *Supplemental Budget (Exhibit G)* must be completed.
- The Service Provider Name Column must list the subrecipient's name.
- The Sub awarded Amount Column must contain the desired subaward amount of each service provider listed in the Service Provider Name Column.
- The Deliverables Column must contain the deliverables contributing to the grant objectives for each provider listed in the Service Provider Column.
- Right-click on the Total cell in the Sub awarded Amount Column and select "Update Field" to populate the total award for each amount listed in the Sub awarded Amount Column.

Exhibit G – Supplemental Budget, Section 3: Contractor

- Section 3 of Exhibit G Supplemental Budget is for contractual services. Contractual Services must be completed.
- If an applicant plans to procure a contract with a contractor such as a vendor, dealer, distributor, merchant, or other seller providing goods or services, the *Supplemental Budget (Exhibit G), Section III:* Contractor must be completed.
- The Description-Type of Service Column must list the type of services the contractor will provide through procurement.
- The Cost Column must contain the service cost for each service listed in the Description-Type of Service Column.
- The Service Provider (If Known) Column must list the contractor's name that will be competitively procured to provide the contractual services for each service listed in the Description-Type of Service Column.
- Right-click on the Total cell in the Cost Column and select "Update Field" to populate the total cost for each amount listed in the Cost Column.

Exhibit G Supplemental Budget must be submitted in MS Word format. Save this document according to the naming convention: "XYZ ESE PY 24-25 ExG."

Exhibit I – Project Work Plan (Exl)

- Describe the goals of the project in the space provided.
- In the space provided, list barriers or external factors that may affect the implementation of the project or that may impede the attainment of project goals.
- Describe the plans to overcome the barriers.
- List the responsible partner(s) implementing the activity(ies).
- The Activities column may be used to describe activities applicable to the project, such as Start-up Activities, Business Partners Selected to Hire, Outreach and Recruitment, Screening/Enrollment/Assessment, Work Activities, CoP, Partner Meetings, Convenings, Employment Retention and Follow-up, Closeout Activities, and Other.
- To add rows, place the cursor between lines at the far-left side of the table and select the "+" symbol.

Exhibit I Project Work Plan must be submitted in MS Word format. Save this document according to the naming convention: "XYZ ESE PY 24-25 ExI."

Exhibit J – Partner Roles and Responsibilities (ExJ)

- List all partners in the Organization Column.
- To add a row for additional partners, hover over a row in the far-left column and select the plus sign symbol when it appears. Then, copy and paste the preformatted rows into the newly added rows using the paste option "Overwrite Cells."
- Enter the contribution amounts for the Leveraged Resources Amount Column, if available.
- Right-click "Update Field" to populate the Total Leveraged Resources Cell.
- The Roles and Responsibilities column should include concise summaries of the specific tasks, services, or support partners provided for each organizational type. A more indepth description of roles and responsibilities can be provided in the Project Narrative.
- List the source under the Leveraged Resources Column for partners providing leveraged resources.
- Check "Yes" in the Partnership Agreement Letter Column if a partner provided a Partnership Agreement Letter.

Exhibit J Partner Roles and Responsibilities must be submitted in MS Word format. Save this document according to the naming convention: "XYZ ESE PY 24-25 ExJ."

Exhibit K – Performance Goals Matrix (ExK)

- Complete and submit each target population's Performance Goals Matrix (Exhibit K).
- The state requires subrecipients to track the total number of participants enrolled in education, training, and/or training-related employment. Data written in the narrative should be reflected in the Performance Goals Matrix (Exhibit K). The program requires that all data associated with performance be tracked in CalJOBS.
- In the Performance Goals Matrix (Exhibit K), the rows under Performance Goals Descriptions list the required performance indicators for this grant.
- In the second column, under Total Participants, enter the total planned number of participants for each performance goal in the first column.
- The Performance Goal Rate (%) column is a calculated field. Do not delete or enter figures in the calculated fields. Once the data in the Total Participants column has been completed, right-click on each cell marked "! Zero Divide" and select "Update Field" to populate the Performance Goal Rate column.
- Performance Goal Rate Formulas:
 - Number to be enrolled in certified training and work-based learning (WBL)

 $\frac{\text{Number to be enrolled in certified training and work} - \text{based learning (WBL)}}{\text{Total Participants to be served}}$

Number enrolled scheduled for completion of credentials.

Number enrolled scheduled for completion of credentials

Total Participants to be served

o Employment Rate 2nd Quarter after Exit

Employment Rate 2nd Quarter after Exit

Total Participants Exited

Employment Rate 4th Quarter after Exit

Employment Rate 4th Quarter after Exit

Total Participants Exited

Credential Attainment within 4 Quarters after Exit

Credential Attainment within 4 Quarters after Exit

Total Participants Exited

Refer to EDD Directive Performance Guidance for Procurement Guidelines (WSD22-01).

Note – Subrecipients must complete detailed expenditure and enrollment plans if awarded as part of the Subgrant Agreement.

C. Exhibit Attachment Instructions

Complete only the required information in the exhibit's attachments. Do not change or alter the exhibit attachments. Submit all exhibit attachments in the required format with the following title: "[Applicant Initialism] ESE PY 24-25 [Attachment title]". For example, "XYZ ESE PY 24-25 CovSign" for the Cover Signature Page. File names must not exceed 40 characters. Disclaimer: The exhibit attachment has been formatted for accessibility in compliance with the Americans with Disabilities Act. All Exhibit Attachments must be completed in the format provided.

Cover Signature Page (CovSign)

The Cover/Signature page must be completed and submitted electronically as a PDF document with the electronic signature of the signatory authority designated by the organization applying. Ensure that contact information for both the designated contact person and the authorized signatory authority is correct. Save this document according to the naming convention: "[Applicant Initialism] ESE PY 24-25 CovSign". For example, "XYZ ESE PY 24-25 CovSign". File names must not exceed 40 characters.

Executive Summary (ExecSum)

The Executive Summary is limited to three pages. All sections must be completed. The Executive Summary will be publicly posted online and must be written in complete sentences (unless otherwise indicated) with proper grammar. Acronyms must be spelled out the first time they are used. Summaries that do not meet these requirements will be returned to the applicant to be rewritten. See the bulleted list below for specific instructions. Save this document according to the naming convention: "[Applicant Initialism] ESE PY 24-25 ExecSum". For example, "XYZ ESE PY 24-25 ExecSum". File names must not exceed 40 characters.

Executive Summary Content

ESE Programs and Industry(ies) of Focus

- Targeted organizations and industries must be alphabetically and adequately capitalized (for example, Advanced Manufacturing, Business Services, Cybersecurity, Healthcare, Information Technology, and Security Services).
- Do not include a narrative in this space.

Counties to be Served

• If serving more than one county, list counties in alphabetical order.

Key Partners

List critical partners in a bulleted list.

• Required partners should be listed first, followed by additional training, education, employer, and supportive services partners.

Project Description

- Provide an abstract of project highlights (this section should summarize the Project Narrative.
- Use complete sentences and proper grammar.

Outreach Plan for Targeted Populations to be Served

- Provide an abstract of outreach plan highlights (this section should summarize the project outreach.
- Use complete sentences and proper grammar.

Proposed Outcomes

- Proposed outcomes are not the same as performance goals. Outcomes are mid- and long-term results demonstrating individual participants' progress towards successful career pathways and reflecting a meaningful change in the workforce system.
- Include the proposed outcomes of your project in a short narrative.

Commitment Letters (ComLtr)

Applicants are required to demonstrate a minimum of XX percent leveraged resources in relation to the total requested funds to be calculated according to the following example:

Requested Funds: \$2,000,000

Minimum Leveraged Resources: (\$2,000,000) x (XX%) = \$400,000

Leveraged resources can be leveraged from various sources, including, but not limited to, businesses, industry associations, labor organizations, CBOs, education and training providers, and/or federal, state, and local government programs. This may include other WIOA funds, provided this project's scope falls under the allowable activities of those funds. Leveraged resources will be subject to the reporting requirements in WSD19-05 Subject: Quarterly and Monthly Financial Reporting Requirements (December 4, 2019) and Title 2 CFR Part 200: Uniform Guidance, Section 200.306.

"In-kind contribution" is a contribution of non-cash resources explicitly used for project activities. This type of contribution includes, but is not limited to, donated personnel or staff, services, and use of equipment or space. If an education provider provides classroom instruction, for example, the classroom space and instructor(s) are considered a leveraged resource, and the value of the space and instruction qualifies as an "in-kind" contribution.

Commitment Letters are not required if there is no leverage fund requirement, as in Track #2.

Applicants are encouraged to provide a letter to verify the dollar amount and the source of contributions from each entity that pledges leveraged resources to the project. The letters

should clearly define the contribution parameters and include the exact cash amount or an estimate of the in-kind dollar amount of the contribution. If provided, the individual amounts and totals in these letters should match those listed in Exhibit J: Partner Roles and Responsibilities. In the case of a discrepancy, the dollar amount pledged in the letter will be used in all calculations. If a partner or partners contribute, the applicant must provide a letter conforming to the stated guidelines.

Each commitment letter must contain the following:

- Describe in detail the specific roles and responsibilities of each of the partners.
- Describe how the services will differ from or enhance what already exists locally.
- Be signed by an authorized signatory representative of the partner agency with the contact's name, title, and telephone number.
- Be dated within the grant competition period between December 27, 2024, to February 14, 2025.
- Be submitted together in one continuous PDF entitled "[Applicant Initialism] ESE PY 24-25 Commit Letters". For example, "ABC ESE PY 24-25 Commit Letters". Names must not exceed 40 characters.

Partnership Agreement Letters (PartLtr)

Applicants must submit letters of agreement for the strategic partnerships established in the proposal. Each partnership agreement letter must:

- Describe each partner's specific roles and responsibilities related to the project goals.
- Describe how the services will differ from what already exists locally.
- Identify an agency contact person and telephone number.
- Be signed by an authorized signatory representative of the partner agency.
- Describe the extent of the partnership and its anticipated outcomes.
- Be dated within the grant competition period between December 27, 2024, to February 14, 2025
- Letters must be submitted in one continuous PDF entitled "[Applicant Initialism] ESE PY 24-25 Partner Letters." For example, "ABC ESE PY 24-25 Partner Letters." Names must not exceed 40 characters.

Please note: Evidence of partnership commitments such as compacts, agreements, and memoranda of understanding (MOUs) are acceptable. However, MOU and formal partnership letters will score higher since they guarantee higher collaboration.

Indirect Cost Declaration (ICD)

The Indirect Cost Declaration must be completed to indicate if an organization is going to claim indirect costs to this WIOA Title I program and, if so, which indirect cost method will be used:

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- Indirect Cost Rate Agreement (ICRA) Attach ICRA and indirect cost certification letter
- Cost Allocation Plan (CAP) Attach CAP and certification letter
- De Minimis Rate (check only if you do not receive more than \$35 million annually in direct federal funds and you do not have a currently approved ICRA)
- An ICR approved by the Employment Development Department Attach the ICR proposal and indirect cost certification letter.

The applicant must complete the Word version provided in the SFP and sign it by the authorized signatory. Save and submit this document according to the naming convention: "XYZ ESE PY 24-25 ICD".

Please note: If an applicant indicates that they are using an ICRA or CAP, they must include the ICRA approved by the Cognizant/Approving Agency OR attach a Cost Allocation Plan with a certification letter. Save and submit this document according to the naming convention: "XYZ ESE PY 24-25 ICRA".

Appendix B: WIOA Allowable Activities

The WIOA permits three career services: a) basic career services, b) individualized career services, and c) follow-up services.

Basic Career Services

- Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs.
- Outreach, intake, and orientation to information and other services available through the one-stop delivery system.
- Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
- Job search, placement assistance, and career counseling, including the following:
 - o Information on in-demand industry sectors and occupations.
 - o Information on nontraditional employment.
 - Appropriate recruitment and other business services on behalf of employers, including information and referrals to specialized business services other than those traditionally offered through the one-stop delivery system.
- Provision of referrals to and coordination of activities with other programs and services, including programs and services within the one-stop delivery system and other workforce development programs.
- Provision of workforce and labor market employment data relating to local, regional, and national labor market areas, including the following:
 - Job vacancy listings in labor market areas.
 - o Information on job skills necessary to obtain the vacant jobs listed.
 - Information relating to local, in-demand occupations, including earnings, skill requirements, and opportunities for advancement.
- Provision of performance and program cost information pertaining to eligible providers of training services by program and type of providers.

- Provision of information regarding the Local Area performance that specifies local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system.
- Provision of information relating to the availability of supportive services or assistance, including child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under the CalFresh Program—federally known as the Supplemental Nutrition Assistance Program (SNAP); assistance through the earned income tax credit; assistance, supportive services, and transportation through the Temporary Assistance for Needy Families (TANF) program.
- Provision of information and assistance regarding filing claims for Unemployment Insurance (UI), by which the America's Job Center of CaliforniaSM (AJCC) must provide "meaningful assistance" to individuals seeking assistance in filing a UI claim. The term "meaningful assistance" means the following:
 - Assisting on-site using staff who are well-trained in UI claim filing and the rights and responsibilities of claimants.
 - Assisting by phone or via other technology, if the assistance is provided by trained and available staff and within a reasonable time.
 - Assistance in establishing eligibility for financial aid assistance for training and education programs not provided under the WIOA.

Individualized Career Services

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include the following:
 - o Diagnostic testing and use of other assessment tools.
 - In-depth interviewing and evaluation to identify employment barriers and employment goals.
- Development of an individual employment plan to identify employment goals, achievement objectives, and the appropriate combination of services for the participant to achieve their employment goals, including information about eligible training providers.
- Group counseling.
- Individual counseling.

- Career planning.
- Short-term pre-vocational services include the development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training.
- Internships and work experiences that are linked to careers.
- Workforce preparation activities.
- Financial literacy services.
- Out-of-area job search assistance and relocation assistance.
- English language acquisition and integrated education and training programs.

Follow-up Services

Follow-up services, such as counseling regarding the workplace, are provided for participants in adult or dislocated worker workforce investment activities who are placed in unsubsidized employment. Participants may receive follow-up services for up to 12 months after the first day of employment.

Each proposal should include follow-up services for participants after being placed in unsubsidized employment and after exiting the project. The follow-up is intended to support the client in retaining employment and improving their employment success after exit. The final follow-up design will be negotiated with each successful applicant during contract negotiations based on the length of the contract and the funding available to the applicant. While follow-up services must be available, not all registered participants placed into unsubsidized employment will need or want such services.

Appendix C: Allowable Costs and Cost Items Matrix

An entity that receives funds under Title I of the WIOA must comply with the OMB Uniform Guidance 2 CFR Part 200 and U.S. DOL exceptions 2 CFR Part 2900. In general, to be an allowable charge under the WIOA, a cost must meet the following criteria:

- Be necessary and reasonable for the performance of the award.
- Be allocable to the award.
- Conform to any limitations or exclusions set forth in the award.
- Be consistent with policies and procedures that apply uniformly to both federally financed and other activities of the non-federal entity.
- Be accorded consistent treatment.
- Be determined in accordance with generally accepted accounting principles.
- Not be used to meet cost-sharing or matching requirements of any other federally financed program (without prior approval from the state).
- Be adequately documented.

Below is a high-level cost items matrix with six columns. The first four columns identify cost items and various entity types. The remaining two columns are reserved for the specific Uniform Guidance sections and DOL exceptions (if applicable). It should be noted that the matrix is intended to be used as an initial tool or quick reference guide rather than a final authority for determining whether a cost would be considered allowable. The legend key below, along with the definitions, is intended to help the user understand whether a cost item is allowable or not.

Figure C.1: Allowable Costs Legend

Legend Key	Legend Key Definition
А	Allowable
AP	Allowable with Prior Approval
AC	Allowable with Conditions
U	Unallowable

Legend Key	Legend Key Definition
NS	Not Specified in the Uniform Guidance

Users should delve further into the various information sources if a cost item is denoted with two or more legend keys, as they may provide the additional necessary clarity. If this effort does not provide the essential information, then the project manager or Regional Advisor should be contacted. The "NS" legend key means that information may not be readily available. In this event, other information sources should be sought before contacting the project manager or Regional Advisor. The "AP" legend key means that, in some instances, prior written approval will be required. In this event, the user should adhere to the Uniform Guidance Section 200.407, DOL exceptions Section 2900.16, and contact their project manager or Regional Advisor.

Figure C.2: Cost Items Matrix

Cos	t Item	Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
	Advertising and public relations	A/U	A/U	A/U	200.421	
	Advisory councils	AC/U	AC/U	AC/U	200.422	
	Alcoholic beverages	U	U	U	200.423	
	Alumni/ae activities	U	NS	NS	200.424	
	Audit services	AC/U	AC/U	AC/U	200.425	
	Bad debts	U	U	U	200.426	
	Bonding costs	Α	Α	Α	200.427	
	Collection of improper payments	А	А	А	200.428	
	Commencement and convocation costs	AC/U	NS	NS	200.429	

Cost	t Item	Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
	Compensation – personal services	A/U	A/U	A/U	200.430	
	Compensation – fringe benefits	A/U	A /U	A/U	200.431	
	Conferences	А	А	A	200.432	
	Contingency provisions	AC/U	AC/U	AC/U	200.433	2900.18
	Contributions and donations	U	U	U	200.434	
	Defense and prosecution of criminal and civil proceedings, claims, appeals, and patent infringement	AC/U	AC/U	AC/U	200.435	
	Depreciation	AC	AC	AC	200.436	
	Employee health and welfare costs	А	А	А	200.437	
	Entertainment costs	U/AP	U/AP	U/AP	200.438	
	Equipment and other capital expenditures	AP/U	AP/U	AP/U	200.439	
	Exchange rates	AP	AP	AP	200.440	
	Fines, penalties, damages, and other settlements	U/AP	U/AP	U/AP	200.441	
	Fundraising and investment management costs	U/AP/A	U/AP/A	U/AP/A	200.442	

Cost Item	Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
Gains and losses on disposition of depreciable assets	AC	AC	AC	200.443	
General cost of government	NS	NS	U/A	200.444	
Goods or services for personal use	U/AP	U/AP	U/AP	200.445	
Idle facilities and idle capacity	AC/U	AC/U	AC/U	200.446	
Insurance and indemnification	AC/U	AC/U	AC/U	200.447	
Intellectual property	A/U	A/U	A/U	200.448	
Interest	AC/U	AC/U	AC/U	200.449	
Lobbying	U	U	U	200.450	
Losses on other awards or contracts	U	U	U	200.451	
Maintenance and repair costs	А	А	А	200.452	
Material and supplies costs, including costs of computing devices	А	А	А	200.453	
Memberships, subscriptions, and professional activity costs	A/U	A/U	A/U	200.454	
Organization costs	U/AP	U/AP	U/AP	200.455	

Cost Item	Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
Participant support costs	AP	АР	АР	200.456	
Plant and security costs	А	А	Α	200.457	
Pre-award costs	AP	AP	AP	200.458	
Professional services costs	А	А	А	200.459	
Proposal costs	A	А	A	200.460	
Publication and printing costs	А	А	А	200.461	
Rearrangement and reconversion costs	A/AP	A/AP	A/AP	200.462	
Recruiting costs	A/U	A/U	A/U	200.463	
Relocations costs of employees	AC/U	AC/U	AC/U	200.464	
Rental costs of real property and equipment	AC/U	AC/U	AC/U	200.465	
Scholarships and student aid costs	AC	NS	NS	200.466	
Selling and marketing	U/AP	U/AP	U/AP	200.467	
Specialized service facilities	AC	AC	AC	200.468	
Student activity costs	U/AP	U/AP	U/AP	200.469	2900.19
Taxes	AC	AC	AC	200.470	

Cos	t Item	Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
	Termination costs	AC/U	AC/U	AC/U	200.471	
	Training and education costs	А	А	А	200.472	
	Transportation costs	А	А	А	200.473	
	Travel costs	AC	AC	AP	200.474	
	Trustees	А	А	NS	200.475	

Appendix D: Administrative Costs

Under the WIOA, there is an administrative cost limit of 10 percent. As stated in 20 CFR Section 683.215, the following WIOA Title I function, and activities constitute the costs of administration subject to the administrative cost limitation:

- 1. "The administration costs are expenditures incurred by direct grant recipients, local grant recipients, local grant subrecipients, and local fiscal agents, which are unrelated to the direct provision of WIOA services, including services to participants and employers. These costs can be both personnel and non-personnel, direct and indirect."
- The costs of administration are the costs associated with performing the following functions:
 - a. Performing the following overall general administrative functions and coordination of those functions under WIOA Title I:
 - Accounting, budgeting, financial, and cash management functions
 - Procurement and purchasing functions
 - Property management functions
 - Personnel management functions
 - Payroll functions
 - Coordinating the resolution of findings arising from audits, reviews, investigations, and incident reports
 - Audit functions
 - General legal services functions
 - Developing systems and procedures, including information systems, required for these administrative functions
 - Fiscal agent responsibilities
 - b. Performing oversight and monitoring responsibilities related to WIOA administrative functions.

- c. Costs of goods and services required for administrative functions of the program, including goods and services such as rental or purchase of equipment, utilities, office supplies, postage, and rental and maintenance of office space.
- d. Travel costs incurred for official business in carrying out administrative activities or the overall management of the WIOA system.
- e. Costs of information systems related to administrative functions (for example, personnel, procurement, purchasing, property management, accounting, and payroll systems), including the purchase, systems development, and operating costs of such systems.
- 3. Awards to sub-recipients or contractors that are solely for the performance of administrative functions are classified as administrative costs:
 - a. Personnel and related non-personnel costs of staff that perform both administrative functions specified in item 2 of this section and programmatic services or activities must be allocated as administrative or program costs to the benefitting cost objectives/categories based on documented distributions of actual time worked or other equitable cost allocation methods.
 - b. Specific costs charged to an overhead or indirect cost pool that can be identified directly as a program cost are to be charged as a program cost. Documentation of such charges must be maintained.
 - c. Except as provided in item 2a of this section, all costs incurred for functions and activities of subrecipients, and contractors are program costs.
 - d. Continuous improvement activities are charged to the administration or program category based on the purpose or nature of the activity to be improved. Documentation of such charges must be maintained.
- 4. Costs of the following information systems, including the purchase, systems development, and operational costs (for example, data entry), are charged to the program category:
 - a. Tracking or monitoring of participant and performance information.
 - b. Employment statistics information, including job listing information, job skills information, and demand occupation information.
 - c. Performance and program cost information on eligible providers of training services, youth activities, and appropriate education activities.

- d. Local Area performance information.
- e. Information relating to supportive services and unemployment insurance claims for program participants.
- 5. Where possible, entities identified in item 1 must make efforts to streamline:
 - a. Services in item 2a-2e of this section to reduce administrative costs by minimizing duplication and effectively using information technology to improve services.

Appendix E: Internet Resources

The following websites provide additional information that may help develop project plans, build partnerships, obtain data, and respond to questions in the SFP:

America's Job Center of CaliforniaSM (AJCC)

Central location for information about Job/Career Centers and related links.

California Association for Local Economic Development (CALED)

Economic development organization dedicated to advancing its members' ability to achieve excellence in delivering economic development services to their communities and business clients within California.

California Community Colleges Economic and Workforce Development (CCCEWD)

The primary system for delivering career technical education and workforce training to Californians.

California Department of Finance-Demographic Research (DOF)

State finance census data, including population by gender, age, and race by county.

California Department of Health Care Services (DHCS)

Provides services to preserve and improve the health status of all Californians.

California Department of Education (DOE)

Programs available to provide adults with the knowledge and skills necessary to participate effectively as productive citizens and workers.

California Department of Industrial Relations-Division of Apprenticeship Standards (DIR-DAS)

Provides opportunities for workers to gain employable lifetime skills and provides employers with a highly skilled and experienced workforce while strengthening California's economy. Contains information on the quality elements of apprenticeship and pre-apprenticeship programs.

California Department of Rehabilitation (DOR)

Services and advocacy for employment, independent living, and equality for individuals with disabilities.

California Department of Social Services (DSS)

Oversight and administration of programs serving California's most vulnerable residents.

California Employment Development Department (EDD)

The EDD is the administrative entity for the WIOA ESP SFP. This site contains links to a wide range of employment and training resources, including labor market information.

California's 2020-2023 Unified Strategic Workforce Development Plan (State Plan)

The State Plan represents an agreement among partners identified in the WIOA and serves as the framework for the development of public policy, fiscal investment, and operation of the state workforce and education system.

CalJOBSSM (CalJOBS)

The CalJOBS system is California's online resource to help job seekers and employers navigate the state's workforce services. The enhanced system allows users to easily search for jobs, build résumés, access career resources, find qualified candidates for employment, and gather information on education and training programs.

California Labor and Workforce Development Agency (LWDA)

The Labor Agency oversees seven major departments, boards, and panels that serve California businesses and workers, including the EDD.

California Workforce Association (CWA)

CWA is a non-profit membership organization that develops public policy strategies and builds local capacity to address critical workforce issues while collaborating with workforce development partners in California.

California Workforce Development Board (CWDB)

The CWDB establishes policy for and provides guidance to, Local Workforce Development Boards (Local Board), which provide services under the WIOA.

Disability Benefits 101 (DB 101)

Gives tools and information on health coverage, benefits, and employment.

Final Rule (Uniform Guidance)

Uniform Guidance applies to all federal awards, including funds awarded under this SFP.

EDD Labor Market Information Division (LMID)

Find labor market information to research and write the proposal.

Local Workforce Development Areas (Local Area)

A listing of Local Areas with addresses and contact information.

Office of Management and Budget (OMB)

The OMB oversees and coordinates federal administration procurement, financial management, information, and regulatory policies.

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Resources for Grant Subrecipients (EDD Resources)

An EDD website featuring "Frequently Asked Questions," project management resources, guidance, webinar materials and other important information for applicants and subrecipients.

United States Census Bureau (Census Bureau)

Serves as the leading source of quality data about people, business, and economy.

U.S. Small Business Administration (SBA)

Guidance and resource information to owners and operators of small businesses.

U.S. Chamber of Commerce – Institute for Competitive Workforce (ICW)

Develops workforce strategies for businesses, chambers of commerce, and communities to hire, train, retain, and advance skilled workers in the 21st century.

U.S. Department of Labor Employment and Training Administration (DOLETA)

The U.S. DOLETA is the federal agent for the WIOA program.

Workforce Development Solicitation for Proposals (SFP)

WIOA-funded SFPs and related information can be accessed from the EDD's SFP page.

WorkforceGPS (WorkforceGPS)

An integrated workforce system network sponsored by the DOL Employment and Training Administration.

Workforce Innovation and Opportunity Act (WIOA)

The act governing the funds made available in this SFP.

Appendix F: CalJOBS Workstation and Software Requirements

Figure F.1: Workstation Requirements (VOS v16.x)

System	Hardware Required	Software Required	Connectivity
Client	Processor: PIII or higher	Operating System:	Minimum:
Workstation	Memory: 2 GB of RAM or higher Display: Super VGA (800 X 600) or higher-resolution video adapter and monitor	Microsoft Windows 7 Macintosh OS X v10. 4.8 (Panther) or higher 3rd-Party Software (described after the table): Meadco ScriptX ActiveX 7.4/ Object¹/ Microsoft Silverlight 3² DynamSoft HTML5 Document Scanning	Dedicated broadband or high- speed access, 380k or higher
Staff/ Administrator Workstation	Processor: PIII or higher Memory: 2GB of RAM or higher Display: Super VGA (800 X 600) or higher-resolution video adapter and monitor	Operating System: Microsoft Windows 7 Macintosh OS X v10. 4.8 (Panther) or higher. JAWS for Windows software for visually impaired access (optional) 3rd-Party Software (described after the table): Meadco ScriptX ActiveX 7.4/ Object Microsoft Silverlight 3 DynamSoft HTML5 Document Scanning	Minimum: Dedicated broadband or high- speed access, 380Kbps or higher

Supported Browsers

For best results, use a current version of one of the following supported browsers:

Desktop Browsers





Apple Safari | Download Latest Version

Opera | Download Latest Version

Microsoft Edge | Download the Latest version

Mobile Browsers

For iOS and Android mobile phones and tablets, use a current version of one of the following supported browsers:

iOS



Google Chrome for iOS

Firefox for iOS

Android





Client Workstations (Third-Party Software)

As indicated in the preceding table, specific freely available third-party software is required on client workstations to maximize all the features in the Virtual OneStop suite.

Figure F.2: Third-Party Software

VOS	v14.0	v15.3	
Adobe Acrobat Reader	v8.0+	v8.0+	Adobe Acrobat Reader
Adobe Flash	v11+	v11+	Adobe Flash
Meadco ScriptX	v7.4+	v7.4+	Meadco ScriptX
Microsoft RSClientPrint for SSRS reports			Downloading and installing the ActiveX control RSClientPrint.cab requires administrator permissions on the client machine. A user with permissions would opt to install when prompted by their browser to download the Active X control.
DynamSoft HTML5 Document Scanning			DynamSoft Download DynamicWebTWAINHTML5Edition.exe

Meadco ScriptX 7.4: ScriptX provides for the closely controlled printing of HTML- and XML-based documents. It is a client-side ActiveX object used throughout Virtual OneStop to ensure the consistent formatting and appearance of printed output from any local or networked printer, regardless of the printing attributes already set in that computer's browser. It temporarily controls printer settings such as margin sizes, header and footer information, page numbering, and whether to print in Landscape or Portrait mode. The control is in place at the time of printing a browser window or framed content; all settings are automatically restored to default settings, and no permanent changes are saved. ScriptX v7.5 or later is required when working with Internet Explorer 8 on Windows XP, Windows Vista, and Windows 7.

Adobe Acrobat Reader 11: Certain documents (such as User Guides and Quick Reference Cards) are available to our customers on our external OPC website as Adobe Acrobat files. They are also frequently attached as some resources available on the Staff Online Resources page in Virtual LMI. These files can be read with Adobe Acrobat Reader 6.0 or higher; however, it is recommended that this recent version of Adobe Acrobat Reader be installed. Acrobat Reader is free browser software.

Adobe Flash 11: The Training/Learning Center Videos for Virtual OneStop can be watched with Adobe Flash 9 or later, although we recommend the current version 11. Adobe Flash is free browser software. The only limitations may be client firewalls and security obstructions that may keep the videos from functioning correctly.

RSClientPrint is a Microsoft ActiveX control that enables client-side printing of Microsoft SQL Server Reporting Services reports. The ActiveX control displays a custom print dialog box that shares common features with other print dialog boxes. The client-side print dialog box includes a printer list for selection, a print preview option, page margin settings, orientation, etc.

Downloading and installing the ActiveX control RSClientPrint.cab requires administrator permissions on the client machine.

VOS uses CKEditor version 4.3.1

The version 14.0 Virtual One Stop (VOS) currently uses version 4.3.1 of CKEditor. CKEditor is used within the VOS system to allow you to use common word processing features in the system with such things as job descriptions, resumes, and cover letters.

CKEditor supports all popular browsers, including Chrome, Firefox, Internet Explorer, Opera, and Safari. However, Internet Explorer 7 (or lower) and Firefox 3.6 are no longer supported (CKEditor 4.1.3 was the last version to support Internet Explorer 7 and Firefox 3.6).

It should also be noted that while the latest version of Safari is actively supported, earlier versions may have compatibility issues.

If using these unsupported browser versions, the browser should be updated to avoid compatibility issues.