

## **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***  
**Equity Target Population Fund Program Year 2022-23**

**Solicitation for Proposals**



**November 2022**

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This Equity Target Population Fund is funded by a grant award totaling \$8 million (100%) from the U.S. Department of Labor, with \$0 (0%) financed from non-federal sources.

## Proposal Package Instructions and Exhibits

The following contains the required exhibits for the Program Year 2022-23 (PY 22-23) Equity Target Population Fund (ETPF) grant opportunity. Select each exhibit link individually and download each before saving the solicitation for proposals (SFP) to a personal computer (PC). Applicants should carefully read the SFP for the required elements and follow the Proposal Package Instructions in Appendix A to meet all proposal application requirements.

Note – Once the SFP has been downloaded and saved, the exhibit links will become disabled.

- [Cover/Signature Page \(DOCX\)](#)
- [Executive Summary \(DOCX\)](#)
- [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 \(DOCX\)](#)

## **Table of Contents**

<b>Proposal Package Instructions and Exhibits .....</b>	<b>1</b>
<b>I. Overview .....</b>	<b>1</b>
A. Purpose .....	1
B. Availability .....	2
C. Target Populations .....	2
D. Eligibility .....	3
<b>II. Project Design .....</b>	<b>3</b>
A. Goals and Objectives .....	3
B. Strategies .....	4
C. Required Partners.....	5
D. Data and Supporting Evidence .....	7
<b>III. Application and Program Requirements .....</b>	<b>8</b>
A. Required Exhibits and Attachments .....	8
B. Required Certified Training, Cohort-Based Training, and WBL .....	8
C. Required Wrap-Around Support and Case Management .....	8
D. Registration with the System for Award Management (SAM) .....	10
E. Partnership Agreement Letters.....	10
F. Performance Goals .....	10
G. Collaboration with the EDD .....	11
<b>IV. Budgeting and Performance Requirements .....</b>	<b>11</b>
A. Funding Request.....	11
B. Leveraging Funds and Resources .....	12
C. Allowable Uses of Funds .....	12
D. Administrative Cost Limits.....	13
<b>V. Submission .....</b>	<b>13</b>
A. Submission and Format .....	13
B. Important Dates and Deadlines .....	14
<b>VI. Award and Contracting Process .....</b>	<b>14</b>
A. Proposal Review, Scoring, and Evaluation .....	15
B. Appeals Process.....	16

C. Award Notification .....	16
D. Agreement and Contracting .....	17
<b>VII. Administrative Requirements.....</b>	<b>17</b>
A. Monitoring and Audits .....	17
B. Record Retention.....	17
C. Reporting.....	18
D. Closeout .....	18
E. Compliance.....	18
F. Intellectual Property Rights/Creative Common Attribution License.....	18
G. Stevens Amendment.....	19
C. Evaluation.....	19
<b>Appendix A: Proposal Package Instructions .....</b>	<b>2</b>
<b>Appendix B: WIOA Allowable Activities .....</b>	<b>22</b>
<b>Appendix C: Allowable Costs and Cost Items Matrix.....</b>	<b>25</b>
<b>Appendix D: Administrative Costs .....</b>	<b>30</b>
<b>Appendix E: Internet Resources.....</b>	<b>32</b>
<b>Appendix F: CalJOBS<sup>SM</sup> Workstation and Software Requirements .....</b>	<b>35</b>

## I. Overview

The Employment Development Department (EDD), on behalf of the California Labor and Workforce Development Agency (LWDA), announces the availability of up to \$8 million in Workforce Innovation and Opportunity Act (WIOA) Governor’s discretionary funds for the Equity Target Population Fund (ETPF) Program Year 2022-23 (PY 22-23) Solicitation for Proposals (SFP). The ETPF grants will be awarded to design and implement projects that accelerate equity in employment into good-quality jobs<sup>1</sup> and develop innovative employment strategies for populations facing significant employment barriers by combining demand-driven training and education with tailored wrap-around services.

### A. Purpose

The ETPF PY 22-23 grant competition solicits proposals that employ best practices to accelerate training, break down workforce system barriers, and ultimately qualify participants for current and future good-quality jobs in in-demand industry sectors. Applicants will braid funds<sup>2</sup> and resources, collaborate with postsecondary education providers, engage employers, and draw on the expertise of community-based organizations (CBOs), workforce intermediaries, training providers, and other partners to design programs tailored to the regional population and workforce needs. Funds will be used to design, develop, and implement projects that accelerate equity in employment for justice-involved individuals, disconnected young adults, people with disabilities (PWD), and veterans. In the coming months, the EDD will release SFPs to address the needs of other target populations, including English Language Learners (ELL) and individuals experiencing or at risk of homelessness. The ETPF projects will focus on industry sectors that provide good-quality jobs and career pathways to jobs that pay a living wage, based on the Massachusetts Institute of Technology (MIT) living wage standard for local regions. Projects will also create effective linkages with California's employer and workforce community, including High Road<sup>3</sup> Training Partnerships and apprenticeship programs<sup>4</sup>. The intent is to build meaningful and sustainable industry investment and partnerships, system innovation, and develop initiatives with the best potential to place participants into jobs and career pathways. These funds are critical to increasing equity and building individual and family self-sufficiency.

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<sup>1</sup> Definition of a “good job” has three main components: 1) economic stability, including family-sustaining pay; 2) economic mobility, such as through access to training and wealth-building benefits; and 3) equity, respect, and a voice in the workplace. Detailed information relating to the Good Jobs Champions Group definition can be found on the Aspen Institute website.

<sup>2</sup> Braiding funds is defined as combining multiple funding streams to execute a project. Leveraging multiple funding streams, such as WIOA Title I and II funds, creates a broader pool of resources with which to serve participants.

<sup>3</sup> For more information about High Roads programs, refer to the CWDB’s [High Road Training Partnerships website](#).

<sup>4</sup> For more information about apprenticeship programs and opportunities, refer to the [Division of Apprenticeship Standards website](#) or the [California Apprenticeship Initiative hub](#).

## **B. Availability**

Applicants may apply for up to \$1,000,000 to serve a single population or multiple populations. The state may choose to exceed the maximum amount for awards based on the availability of funds. The EDD anticipates that 8-16 projects will be awarded.

The period of performance (POP) for projects funded under this SFP will be between 18 to 24 months, with an anticipated start date of April 1, 2023. This POP includes all necessary implementation and start-up activities. Grant funds will not be available for longer than 24 months. No obligation of funds will be allowed before or beyond the grant POP. Any funds not expended during the grant agreement period shall be returned to the state.

## **C. Target Populations**

Applicants may choose to serve one or more population(s) based on need in the service area. The eligible populations are listed and defined below.

### **1. Justice-involved Individuals<sup>5</sup>**

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 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 Adults<sup>6</sup>**

For this SFP, disconnected young adults are people who meet the criteria for WIOA-eligible out-of-school youth ages 18-24 and are disconnected from school and work.

### **3. People with Disabilities<sup>7</sup>**

A PWD is an individual who identifies as a person with a physical or mental impairment that substantially limits one or more of the major life activities of such individual, has a record of such impairment, or is regarded as having such an impairment.

### **4. Veterans<sup>8</sup>**

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. Individuals must belong to one of the following priority groups to be eligible to participate. Each group is different and has particular characteristics; however, individual veteran participants can belong to more than one group: campaign, disabled, recently separated, veterans with significant barriers, and other covered veterans.

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<sup>5</sup> WIOA Public Law 113-128, Section 3(38)(a) and (b)

<sup>6</sup> WIOA Public Law 113-128, Section 129(a)(1)(B)

<sup>7</sup> 42 U.S.C. Section 12102 1(a)(b)(c)

<sup>8</sup> 38 U.S.C. Section 101

## **D. Eligibility**

**Applicants:** Local Workforce Development Areas (Local Areas), education and training providers, private non-profit organizations, tribal organizations, faith-based organizations, and CBOs are eligible to apply. Subrecipients<sup>9</sup> of the Equity and Special Populations PY 21-22 are eligible to apply and serve the same or other population(s) in PY 22-23.

**Participants:** All individuals must be at least 18 years of age and meet WIOA Title I eligibility requirements to participate in the ETPF PY 22-23 program.

## **II. Project Design**

Applicants will foster equity through projects that help those with significant barriers to employment enter into good-quality jobs with living wages as outlined in the CWDB's 2020-23 Unified Strategic Workforce Development Plan (State Plan).<sup>10</sup> Projects should build employer and industry partnerships for employment or training for career pathways leading to good-quality jobs. To support equity goals, applicants must provide equal access to disadvantaged or historically marginalized individuals and design programs and outreach strategies that are more inclusive to attract and effectively serve the target population. Grant funds will support innovative projects that test new approaches, build on best practices, leverage strategic partnerships, develop and expand the regional partnership infrastructure, and braid funds and resources across partners. In addition, projects should increase access to good-quality jobs for target populations, align WIOA programs, provide training, wrap-around support, and case management services to meet individuals where they are, and create on-ramps to career pathways with sustainable wages and career mobility.

### **A. Goals and Objectives**

California's workforce development plan seeks to enhance the current system to provide participants with flexible program entry and exit options as they gain skills and obtain stackable credentials, address individual needs with customized services, align programs to maximize support and success, and offer step-by-step guidance to participants as they advance on a career ladder that promises upward mobility. The State Plan emphasizes establishing and scaling a workforce system that prioritizes job quality, equity, environmental sustainability, and worker's voice<sup>11</sup>. Existing social, economic, and institutional bases of inequality mean that economic outcomes are stratified according to race, ethnicity, disability, and gender. The State

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<sup>9</sup> Once an applicant is chosen to receive an official award, or subgrant, they become a subrecipient.

<sup>10</sup> The State Plan emphasizes the establishment and expansion of a High Road workforce system that prioritizes job quality, equity, worker voice, and environmental sustainability. See the [High Road Training Partnerships](#) and [High Road Project Profiles](#) webpages for examples of innovative projects that align with state goals.

<sup>11</sup> Worker voice helps build a culture of continuous learning and collaboration, which is critical as industries change and advance over time.

Plan addresses these issues by prioritizing equity in workforce development to systematically generate greater opportunity for Californians who have been locked out of the mainstream economy, are under-represented in high-wage occupations and industries, and/or face multiple barriers to quality employment. Applicants are encouraged to consult the State Plan to ensure their projects align with the state's workforce development goals. Applicants must demonstrate how their project will direct existing resources and efforts in new and effective ways to serve the target population. Successful proposals will explain how the project is replicable, scalable, and sustainable at the regional or systemic level. Lessons learned will be shared with the Regional Planning Units (RPU), the state, and other stakeholders to create lasting change and improvements in the workforce system.

## **B. Strategies**

The overall equity strategies of the ETPF program should provide opportunities for innovation, testing new approaches, and adapting best practices to provide the target population(s) with opportunities to gain in-demand skills and obtain high-quality employment. Competitive projects will offer skills training programs in partnership with employers, emphasizing cohort-based training<sup>12</sup> designed to build skills for good-quality jobs in in-demand sectors that pay at least a living wage. In pursuit of these goals and strategies, applicants may: (i) create new tools, (ii) borrow methods from other disciplines, and/or (iii) apply models from other sectors or population-specific strategies to achieve the desired outcomes. To ensure the quality, effectiveness, and delivery of the projects being funded, competitive proposals should foreground: (i) strong collaboration with employers, CBOs, apprenticeship programs, and HRTPs; (ii) strategic co-enrollment; (iii) equal access; and (iv) the implementation of evidence-based strategies that provide wrap-around support and case management with a trauma-informed approach. Also, supportive services such as subsidies for childcare and transportation need to be tailored to individual participants' cultural, personal, educational, and professional needs to ensure full engagement in education and training opportunities.

Strategies should be tailored to local or regional needs and incorporate, if applicable, the following:

- Effective cohort-based training programs that address immediate skill gaps or company needs and provide learners with the tools to engage in ongoing upskilling and reskilling.
- Paid work experience (PWEX) or other work-based learnings (WBL) that build employment skills and position workers for jobs.
- Targeted, culturally relevant outreach to increase program diversity and inclusion.
- Specific measures to ensure equal access to education, training, PWEX and WBL opportunities, and career pathways.
- Appropriate technology, technological skills training, and internet resources guarantee accessibility to all participants.

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<sup>12</sup> A cohort-based training is a program of learning that's organized according to a syllabus (usually in sections) and is taken by a group of students (a cohort) at the same time. Cohort-based courses can take place online, in a virtual space, or in a physical classroom.



- Innovative, replicable, scalable, and customizable models that demonstrate potential to inform future state policies.
- Existing collaborations with entities with a demonstrated history of successfully assisting the target population.
- Supportive services (child care, mental health, health, financial literacy, transportation, and other supportive services) to meet individual needs.
- Wrap-around support and case management with a trauma-informed approach.
- New partnerships that engage community stakeholders and increase access to and support for training programs.
- Customized assessment and case management facilitated by: (i) direct services and/or personalized introductions to service providers and (ii) continued support through all aspects of the program.
- Successful models or connections include the High Road Training Partnership (H RTP), IET<sup>13</sup> designs, apprenticeships, and other state innovations.
- Braiding of funds and resources amongst partners to maximize services.
- Cross-cutting workgroups to generate systemic change and build capacity through collaboration.

### **C. Required Partners**

This grant program seeks to create sustainable change by developing long-term working relationships with employers and other partners that will enhance the project's success based on the needs of the target population and service area. Applicants are strongly encouraged to build partnerships with employers in sectors offering career pathways to good-quality jobs accessible to people with barriers. Partnerships should also include workforce and CBOs to support job placement and close gaps in the training provided to the target population(s). Additionally, partnerships must facilitate the provision of a full array of wrap-around support and case management services tailored to the needs of the target population(s) in the project area. Applicants must demonstrate that strong relationships already exist or are in the process of being established with the required partners. To this end, successful applicants will develop partnerships and strategies that provide opportunities for innovation, test new approaches, and adapt best practices to provide the target population(s) with opportunities to gain in-demand skills and obtain high-quality employment.

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<sup>13</sup> IET is a service approach that provides adult education and literacy activities concurrently and contextually with workforce preparation activities and workforce training for a specific occupation or occupational cluster for the purpose of educational and career advancement. IET programs are defined under Final WIOA regulations at 34 CFR §463.35.

All applicants must work with the following required partners<sup>14</sup>

- A Title I Local Area in the service region(s)
- A Title III Wagner-Peyser local office in the service area<sup>15</sup>
- Education and training provider(s) that are Bureau of Private Post-Secondary approved and/or on the State's Eligible Training Provider List (ETPL)<sup>16</sup> offering certificates for in-demand sectors with livable wages and good-quality jobs in the service region
- Employer(s) in industries aligned with the training provided can offer participants job opportunities in in-demand industry sectors
- CBO(s) with expertise serving the target population(s)

Applicants serving veterans must **also** partner with the following:

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

Applicants serving PWD must partner with the following:

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

Applicants serving Justice-Involved Individuals should partner with the following:

- Probation or diversion programs such as drug courts, veterans' courts, community courts, or other specialty courts are administered by Department of Corrections and Rehabilitation staff at the county or state level

Applicants must partner with one of the following training partners<sup>17</sup> when incorporating IET strategies:

- A Title II Adult Education provider
- A California Adult Education Program (CAEP)<sup>18</sup>

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<sup>14</sup> Applicants can serve as a required partner for the proposed project if they are the established service provider and meet the requirement(s) above

<sup>15</sup> Your partnership with Wagner-Peyser, at minimum, should include outreach strategies to ensure the program is addressing the needs of participants who are Long Term Unemployed and meet the characteristics of the populations being served

<sup>16</sup> Refer to *WIOA Eligible Training Provider List* (WSD15-07)

<sup>17</sup> Education and training providers must be Bureau of Private Post-Secondary approved and/or on the State's Eligible Training Provider List (ETPL) except for providers offering specific types of training including but not limited to customized, cohort, and on-the-job training (OJT).

<sup>18</sup> For more information, refer to the [California Community Colleges CAEP website](#).

## **Employer Partners**

Applicants should develop strategic partnerships with employers that have the following:

- Insight into the employers' hiring needs and challenges combined with understanding the needs of the target population(s)
- Policies and tools for performing assessments and hiring procedures
- Understanding the industry sector and regional labor market for in-demand jobs
- Shows evidence or commitment to providing input on the design of the training curriculum
- Documented training and advancement procedures
- Availability for site visits and class presentations
- Openness to WBL, apprenticeship, and OJT
- Open to updating their existing skill requirements and onboarding processes
- Serve as an internal advocate within for companies for the hiring of the target population(s)

## **Other Partners**

The state also encourages applicants to develop partnerships with: (i) human service programs; (ii) additional CBOs; (iii) HRTPs; (iv) the Division of Apprenticeship Standards (DAS) or other apprenticeship initiatives; (v) State Plan partners; (vi) other WIOA programs; (vii) special grants such as the Community Economic Resilience Fund (CERF) or Prison to Employment 2.0 Regional Partnership (P2E 2.0); and (viii) additional initiatives beyond those required by the program, whenever such additional partnerships are both feasible and relevant to the project. Strong applications will clearly articulate how partners will successfully execute each phase of the program, from recruitment to employment.

## **D. Data and Supporting Evidence**

Successful proposals must cite supporting data on labor market demand as applicable from various sources. Relevant data sources may include the EDD Labor Market Information Division (LMID), Bureau of Labor Statistics (BLS), MIT living wage for the local area, local surveys, or any other reliable data source such as consultation with industry associations, Local Areas, or mandatory and non-mandatory partners. The supporting data should: (i) reflect the applicant's comprehensive understanding of the issues specific to the just transition of the target population(s) workers into in-demand industry sector jobs; (ii) demonstrate the need for the proposed project; (iii) justify the project's approach and make a case for the potential for success; (iv) validate program design with evidence that the best practices are being used; and (v) use local data sources that illustrate the experience of individuals and specific communities, such as analyses of local news articles and reliable social media groups, or data from interviews, focus group sessions, or surveys.

### **III. Application and Program Requirements**

All proposals must adhere to proposal 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**

- Cover/Signature Page
- Executive Summary
- 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
- Partnership Agreement Letters and Commitment Letters

#### **B. Required Certified Training, Cohort-Based Training, and WBL**

The ETPF project plan must focus on providing training for good-quality jobs in in-demand industry sectors through innovation. Applicants are required to offer one or more cohort-based training programs that lead to an industry-recognized certification and/or prepare participants for good-quality jobs in in-demand sectors in their region. Applicants are encouraged to utilize or develop pre-apprenticeships, apprenticeships, PWEX, or other WBLs to train participants for good-quality jobs. To this end, partnerships or linkages with the DAS are encouraged. Applicants who do not provide WBL, certified training, or cohort-based training directly must increase access to training by developing a relationship with partners with the demonstrated ability to provide those cohort-based training as part of the project plan.

#### **C. Required Wrap-Around Support and Case Management**

The ETPF project plan must provide program participants with innovative wrap-around support and case management. “Essential elements of this program include (i) strong partner collaboration, (ii) strategic co-enrollment, (iii) equal access, and (iv) 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. Trauma-informed wrap-around support and case management services must be tailored to each participant's cultural, personal, educational, and professional needs to ensure full engagement in education and training opportunities and increase the likelihood of job placement and retention. Wrap-around support and case management services 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 enabling individuals to focus on learning opportunities. Supportive services

can include but are not limited to child care, mental health, health, financial literacy, transportation, and other services to support individual needs.

Below is a list of examples of the workforce and supportive service interventions that have been piloted in other successful programs that meet the requirements listed above:

- **Target population identification and recruitment:** Leveraging existing partnerships to identify individuals living in historically excluded communities with limited access to career opportunities.
- **Prospective participant assessment:** Understanding current economic circumstances, barriers to career advancement, and aspirations.
- **Participant enrollment:** Enrolling in appropriate services and seeking to leverage resources from related government and philanthropic grant programs.
- **Career navigation training and career awareness:** Preparing participants for employment with higher wages and career mobility by leveraging resources through local America's Job Center of California<sup>SM</sup> (AJCCs) to provide training in resume development, interview preparation, and professional network development.
- **Partner support services:** Coordinating with community partners to identify potential participants; assess their needs, interests, and aspirations; and enroll them in appropriate workforce development services.
- **Partner outreach:** Coordinating with community partners to increase awareness of jobs and careers with family-sustaining wages and benefits and access to personal and professional growth.
- **Occupational skills training:** Partnering with community colleges, adult schools, and other education and training institutions to provide short-term training leading to employment.
- **Employment:** Partnering with regional employers with job openings that are accessible and offer career mobility.
- **Supportive services:** Providing childcare support, transportation subsidies, and other supportive services to assist the participant's learning and employment progression.
- **Case management:** supporting individuals while participating in training to address issues with attendance, learning and skill development, behavior, and work readiness, including coordination with instructors and other programs and referrals.

#### D. Registration with the System for Award Management (SAM)

Applicants must register with the SAM in order 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 submitting an application 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 submitting the application. Visit the [SAM website](#) for more information about registration requirements.

#### E. Partnership Agreement Letters

Applicants must submit agreement letters from each of their recommended partners. If the applicant is one of the partners and/or provides required leveraged funds or resources, the applicant must provide their own letter to document the commitment. See Appendix A for more information on submitting partnership agreement letters.

#### F. Performance Goals

Applicants can reference the state’s negotiated performance goals in Figure 2. 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, [WSIN21-51](#), Subject: *State Negotiated Performance Goals PY 22 and 23* (June 14, 2022), and [WSIN22-14](#), Subject: *Local Area Negotiated Performance Goals PY 22 and 23* (October 13, 2022) for more information about performance goals.

**Figure 2: State Negotiated Performance Goals**

<b>PY 22-23 Negotiated Performance Goals</b>	<b>Adults</b>
Employment Rate 2nd Quarter After Exit	64.0%
Employment Rate 4th Quarter After Exit	61.0%
Median Earnings 2nd Quarter After Exit	\$7,000
Credential Attainment within 4 Quarters After Exit	65.5%
Measurable Skill Gains	55.0%

In addition to the WIOA performance measures, the state requires subrecipients to track total participants enrolled in education, training, and training-related employment.

For this SFP, the applicant is encouraged to exceed the state-negotiated performance goals in delivering on the measurable employment and quality job outcomes outlined below. Applicants should tailor performance goals to the project needs and regional objectives and provide jobs in the in-demand sectors with wages that meet or exceed the local MIT living wage standard with measurable skill gains of at least 75 percent. The project narrative explanation of performance goals must reflect a data-driven local/regional economic analysis that supports the proposed project performance goals concerning service delivery, target populations, and skill attainment.

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

- Number of participants who complete the program
- Number of participants who enter employment 2<sup>nd</sup> Quarter After Exit
- Number of participants who enter employment 4<sup>th</sup> Quarter After Exit
- Median Earnings 2<sup>nd</sup> Quarter After Exit
- Hourly wages met or exceeded earnings compared to MIT's Living Wage
- Number of hours worked
- Participants received job benefits

#### **G. Collaboration with the EDD**

The EDD requires key project staff to participate in program evaluation, continuous learning, and program improvement through mandatory quarterly meetings. The EDD Project Manager (PM) is responsible for grant administration and oversight. Key project staff will be required to work closely with the PM for technical assistance, CalJOBS<sup>SM</sup> training, and guidance during start-up, implementation, and throughout the grant POP. Applicants must also participate in the community of practice meetings and other activities organized by external technical assistance (TA) and evaluation providers specially selected by the EDD to evaluate projects. See section VII.C. of the SFP for more information.

### **IV. Budgeting and Performance Requirements**

#### **A. Funding Request**

Applicants may apply for funding of up to \$1,000,000 to serve one or more of the targeted populations. The applicant may serve any number of participants but must provide a rationale for the cost per participant<sup>19</sup>. The average cost 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 impact of the project, earn the maximum return on investment, and foster project replication and sustainability.

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<sup>19</sup> The number of projected participants is calculated using the mid-range average cost per participant (\$5,778) and the high-range average cost per participant (\$7,200). All numbers are approximate due to rounding. The number of projected participants is calculated using the following equation:  $[\text{Amount Requested}] + [\text{Required Leveraged Funds}] / [\text{average cost per participant}]$

## B. Leveraging Funds and Resources

Applicants must demonstrate the ability to leverage a minimum of 20 percent of their budget with funds or services from other sources. The leverage needed for funds is based on the total grant funding requested. Applicants are encouraged to braid funds, leverage human capital, and utilize other resources to maximize the success of the project. Leveraged resources can come from a variety of sources, including but not limited to: (i) businesses, (ii) industry associations, (iii) labor organizations, (iv) CBOs, (v) education and training providers, and/or (vi) federal, state, and local government programs. The leveraged funds may include other WIOA funds, provided this project's scope falls under the allowable activities of those funds. All leveraged funds will be subject to the reporting requirements contained in Workforce Services Directive (WSD) *Monthly and Quarterly Financial Reporting Requirements* (WSD19-05) and Title 2 Code of Federal Regulations (CFR) Part 200: "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards" (Uniform Guidance), Section 200.306 Cost sharing or leveraging.<sup>20</sup>

Leveraged funds are a contribution of funds made available to the subrecipient to be explicitly used for project activities and must be consistent with the allowable activities of the fund source. The awarded subrecipient has control over and disburses these funds. 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 properly documenting pledge contribution agreements.

## C. Allowable Uses of Funds

The WIOA permits three career services: basic career services, individualized career services, and follow-up services as follows:

- **Basic services:** Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs
- **Individualized career services:** Provide direct services to participants, such a short-term pre-vocational training services, supportive services, intensive case management services, and WBL
- **Follow-up services:** The follow-up is intended to support the client in retaining employment and continuing to improve their employment success after exit

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<sup>20</sup> All Workforce Services Directives cited in this SFP can be found on the [EDD website](#).



Applicants must spend most of the grant funds on cohort-based training, wrap-around support, and case management to provide good-quality jobs in in-demand sectors with living wages. 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.

#### **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.

#### **V. Submission**

One proposal will be accepted by each applicant. Do not submit more than one proposal.

##### **A. Submission and Format**

Electronically submit the entire proposal package as a ZIP file to [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov) with the subject line “[Applicant Name] ETPF PY22-23 Proposal.” The entire proposal package, including all elements and the Cover/Signature page with electronic signature, is due by 3 p.m. on Tuesday, December 20, 2022. The Project Narrative, Executive Summary, and all exhibits must be submitted in Microsoft Word. Documents must be saved according to the following naming convention: “[Applicant Name] ETPF PY22-23 [Name of Document]”. The applicant may utilize an acronym for their organization if desired. File names must not exceed 40 characters. The Cover/Signature page, partnership agreement letters, and commitment letters must be submitted in PDF form. The Cover/Signature page must be saved according to the naming convention: “[Applicant Name] ETPF PY22-23 CoverPage”. Letters should be grouped by category and submitted as two separate PDFs with the following naming conventions: “[Applicant Name] ETPF PY22-23 CommitLetters” and “[Applicant Name] ETPF PY22-23 Partner Letters”. File names must not exceed 40 characters. Submit any additional binding documents and Creative Commons Attribution License Verifying Document (if applicable) in Adobe PDF.

## B. Important Dates and Deadlines

Figure 1: Application Timeline

Event	Date
SFP release	November 3, 2022
Last date to submit questions for the webinar	November 15, 2022, by 12 noon
Deadline to preregister for the webinar	November 29, 2022
Informational Webinar	Wednesday, November 30, 2022, at 10 a.m. PT
Notice of Intent to Apply	December 12, 2022, by 12 noon PT
Proposals due	Tuesday, December 20, 2022, by 3 p.m. PT
Proposal review and evaluation	January 9 - 13, 2023
Deadline to appeal	December 20, 2022, by 3 p.m. PT
Award announcements	February 2023
Estimated project start date	April 1, 2023

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

An informational webinar will be held on Wednesday, November 30, 2022, at 10 a.m. PT. This webinar will provide a detailed overview of the SFP and a final opportunity for applicants to ask specific questions about the application process. Preregistration is required for all participants. Submit preregistration requests to [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov) no later than November 29, 2022, with the subject “Preregistration ETPF.” Registrants will receive a confirmation email containing a link to register for the webinar and an attachment entitled “Frequently Asked Questions” (FAQs). Applicants must thoroughly review the SFP, the Proposal Package Instructions in Appendix A, and the FAQs before submitting questions for the webinar. Submit inquiries for the webinar to [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov) with the subject “ETPF PY 22-23 SFP Inquiry.” All inquiries must be received no later than Tuesday, November 15, 2022, by noon PT. After the webinar, a compiled list of questions and answers will be posted on the [EDD website](#).

## VI. 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 publically 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 in making funding decisions. The scoring value of each section of the SFP is as follows:

Figure 4: Scoring Rubric

<b>Narrative Criteria</b>	<b>Maximum Points</b>
Section I – Statement of Need	15
Section II – Project Plan	20
Section III – Performance Goals	20
Section IV – Partnerships and Leveraged Resources	25
Section V – Statement of Capabilities	10
Section VI – Budget Summary Narrative and Plan	10
<b>Total Maximum Points</b>	<b>100</b>

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.

All projects selected for funding are contingent upon the revision and approval of the contract 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 contract negotiation process. The Special Initiatives Support Group will provide guidance with finalizing the exhibits to be incorporated into the official Subgrant Agreement (contract). The EDD reserves the right to rescind any funding offer if a subrecipient does not comply with the revision process and the terms of the Subgrant Agreement.

## **B. Appeals Process**

A proposal may be disqualified for not meeting the application requirements. Read the SFP carefully and consult Appendix A for detailed instructions on how to properly complete and submit all application elements and to ensure all requirements have been met. An appeal of the disqualification decision may be filed; however, take into consideration the following:

- There is no appeal process for not meeting the proposal submission deadline
- Proposals that do not meet the submission deadline or requirements will be deemed incomplete and, consequently, will not be evaluated for funding
- 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 sections III., IV., and V. of the SFP and Appendix A for more information on application and submission requirements.

The EDD will email and mail disqualification letters to applicants. Applicants have seven calendar days from the date the disqualification email is received to appeal. Send all appeals to [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov) by the close of business on the seventh calendar day. The appellant must submit the facts in writing. The review will be limited to the information provided in writing. To be considered for review, the appeal must contain the following information:

- Appealing organization's full name, address, and telephone number
- A brief statement of the reasons for the appeal, including citations to the SFP and pertinent documents
- A statement of the relief sought
- Any and all corrective documentation (for example, if a commitment letter did not contain the exact amount of the leveraged funds, the applicant must include a new commitment letter that meets the requirements indicated in the SFP and Appendix A)
- A scanned copy of the statement with an original wet signature of the authorized signatory of the organization
- Appeals must be submitted in PDF form to [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov)

The EDD will respond to appeals via email. The review will be limited to determining whether the corrective actions taken by the applicant were successful and whether the proposal meets the minimum application requirements 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 mailed by February 2023. An award offer does not constitute approval of the application as submitted. The applicant is required to 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 (contract) details. The EDD may request that the contracts incorporate changes to the original project proposals. After all, exhibits are finalized, the awardee will officially enter into a contract with EDD to provide the services and serve the number of participants listed in the contract for the amount awarded. Any unauthorized deviation or non-responsiveness may be grounds for breach of contract with legal repercussions. Please ensure that the contract goals and objectives are feasible and reasonable for your organization to accomplish and that your infrastructure supports the administrative and operational requirements. The state expects contract negotiations to begin immediately after official award notices are provided. A Notice of Award does not automatically entitle the subrecipient to funding. The EDD reserves the right to terminate any offer of funding 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.

### **VII. Administrative Requirements**

Successful applicants must comply with all administrative and reporting requirements to qualify for awarded funds. Applicants that do not comply may be de-obligated. Refer to *Unilateral De-Obligation* ([WSD16-03](#)) for more guidance.

#### **A. Monitoring and Audits**

During the POP, 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](#)) for more information.

#### **B. Record Retention**

Subrecipients will be required to 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 a period of 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<sup>SM</sup> 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 information. The state will provide training on how to use the CalJOBS<sup>SM</sup> reporting system. Review [Types of Work-Based Learning WIOA Desk References](#) and [CalJOBS<sup>SM</sup> Activity Codes \(WSD19-06\)](#) for guidance on entering grant activity codes. See [CalJOBS<sup>SM</sup> Participant Reporting \(WSD20-10\)](#) for more information regarding participant reporting requirements.

Subrecipients will be required to submit monthly financial and participant reports using CalJOBS<sup>SM</sup>. Subrecipients will also be required to submit quarterly narrative progress reports (QPR) on the status of the projects, which is a condition of the contract, and failure to properly report may result in cash hold and de-obligation. Refer to [Monthly and Quarterly Financial Reporting Requirements \(WSD19-05\)](#) for further information.

### **D. Closeout**

A subgrant line item closeout and narrative closeout report will be required 60 days after the end of the grant term. Applicants should include costs associated with closeout activities in the budget plan. Refer to [WIOA Closeout Requirements \(WSD16-05\)](#) 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 it has been acquired. The subrecipient must use the property for the originally-authorized 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 in the manner specified by the recipient (DOL Exceptions 2 CFR Section 2900.13). Refer to [Property – Purchasing, Inventory, and Disposal \(WSD16-10\)](#) for more information.

### **G. Stevens Amendment**

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 following:

- a. The percentage of the total costs of the program or project which will be financed with Federal money;
- b. The dollar amount of Federal funds for the project or program; and
- c. The percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources.

For more information, refer to the EDD Stevens Amendment webpage.

### **H. Evaluation**

The WIOA Sections 134 and 136 (e) provides 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 evaluation takes place, the subrecipient will be required to participate in that evaluation by providing the requested data and information. Therefore, throughout the POP subrecipients must document lessons learned and effective practices ascertained through this project and share them through the QPR medium.

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## APPENDICES

## Appendix A: Proposal Package Instructions

Applicants must follow the specific 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, commitment letters, and optional letters of support are not included in the 15-page limit, which applies only to the narrative. If you have questions regarding the proposal package after carefully reviewing the SFP and Appendices, email the EDD staff at [WSBGrants@edd.ca.gov](mailto:WSBGrants@edd.ca.gov).

### Format and Document Order

The following chart lists the documents that must be included in the proposal package. This may also be used as a checklist to help ensure a complete grant package submission.

<b>1. Cover/Signature Page</b>	
<b>2. Executive Summary</b>	
<b>3. Project Narrative – Exhibit A (must include the following sections)</b>	
I. Statement of Need	
II. Project Plan	
III. Performance Goals	
IV. Partnerships and Leveraged Resources	
V. Statement of Capabilities	
VI. Budget Summary Narrative and Plan	
<b>4. Exhibits</b>	
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 (one per population served)	
<b>5. Commitment Letters</b>	

<b>6. Partnership Agreement Letters</b>	
A Title I Local Area in the service region(s)	
A Title III Wagner-Peyser local office in the service area	
Education or training partner(s) offering certificates in an in-demand sector in the service region	
Employer(s) in the same sector as training programs	
CBO(s) with expertise serving the target population(s)	
Applicants serving veterans must also partner with Title III Wagner-Peyser Local EDD Jobs for Veterans State Grant staff	
Applicants serving PWD must partner with Title IV Vocational Rehabilitation (VR) Department of Rehabilitation (DOR) and Title III Wagner-Peyser local EDD Youth Employment Opportunity Program (YEOP) for specialization in serving youth with disabilities	
Applicants serving Justice-Involved Individuals should partner with a County or the California Department of Corrections and Rehabilitation probation or diversion programs such as drug courts, veterans courts, community courts, or other specialty courts	
<b>Optional Partner Letters</b>	
Applicants are encouraged to partner with a Title II Adult Education provider or a CAEP to incorporate IET strategies	

\*Any applicant can act as their required partner as long as they can provide a partnership agreement letter as the service provider's documentation.

## **Cover/Signature Page**

The Cover/Signature page must be completed in its entirety and submitted electronically as a PDF document with the authorized signatory's electronic signature. Ensure that contact information for both the authorized contact person and the authorized signatory is correct. Save this document according to the naming convention: "[Applicant Name] ETPF PY 22-23 CoverPage". For example, "OrgXYZ ETPF PY 22-23 CoverPage". File names must not exceed 40 characters.

## **Executive Summary**

The Executive Summary is limited to two 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 Name] ETPF PY 22-23 ExecSum". For example, "OrgXYZ ETPF PY 22-23 ExecSum". File names must not exceed 40 characters.

## **Industry(ies) of Focus**

- Targeted industries must be listed 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.

## **Targeted Populations to be Served**

- Targeted populations must be listed alphabetically.
- If desired, the applicant may include an explanation or a short narrative after listing the targeted populations.

## **Key Partners**

- List key 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.

## 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.

## Exhibit A: Project Narrative

The applicant should clearly demonstrate in the Project Narrative how the applicant's project plan will lead to the success of the target population(s). The entire Project Narrative must be written in MS Word using Calibri 12-point font, limited to 15 pages with one-inch margins, single-spaced, and one-sided on 8.5 x 11-inch 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 Name] ETPF PY 22-23 [Exhibit]". For example, "OrgXYZ ETPF PY 22-23 ExA". File names must not exceed 40 characters.

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

- I. Statement of Need (15 points)
- II. Project Plan (20 points)
- III. Performance Goals (20 points)
- IV. Partnerships and Leveraged Resources (25 points)
- V. Statement of Capabilities (10 points)
- VI. Budget Summary Narrative and Plan (10 points)

For each section to be considered complete, applicants must cite supporting data. Relevant data sources may include the EDD Labor Market Information Division (LMID), Bureau of Labor Statistics (BLS), MIT living wage for the local area, local surveys, or any other reliable data source such as consultation with industry associations, Local Areas, or mandatory and non-mandatory partners. The data should reflect the applicant's comprehensive understanding of the issues specific to the target population, demonstrate the need for the proposed project, justify the project's approach, and make a case for the potential for success. The data should also support the focus on the regionally specific impacts on the risk of the target population(s) and/or evidence of best program design practices to support the target population(s). Applicants should use local data sources that illustrate the experience of individuals and specific communities in need, such as analyses of local news articles, to support the other data presented in the narrative.

The narrative must be organized as follows, include the headers indicated in bold, and address the bulleted prompts. Each section will be reviewed and scored individually for content according to the instructions below.

## **Section I – Statement of Need (Maximum 15 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 region(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 0–5 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. Target Industry Sector (Score Range 0-5 points)**

- Describe the target industry sector(s) in which 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.
- Assess the individual skill levels of the demographic population and provide a comparison of 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.
- If the outreach and recruitment methods for this project have been used before by the organization or other agency, describe the outcomes and lessons learned.
- 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. Certified Training, Cohort-Based Training, and WBL (Score range 0–5 points)**

- Demonstrate a central approach for providing required certified training, cohort-based training, and WBL programs that prepare participants for good-quality jobs in the demand sector in their region.
- Demonstrate a strategy to utilize or develop pre-apprenticeship, apprenticeships, PWEX, or other WBLs to train for good-quality jobs.
- Demonstrate that the approach to providing certified training, cohort-based training, and WBL programs balances participant and community needs with those of employers.
- Demonstrate that the proposed strategy seeks to build the infrastructure necessary to support future WBL, certified training, or cohort-based 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.

### **II.4. Wrap-Around Support/Case Management (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, systemic change, 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 and training opportunities and increase the likelihood of job placement and retention.
- Explain the type of wrap-around support and case management that will be utilized to enable participants to focus on learning opportunities. Examples can include but are not limited to providing assessments, access to career navigation training, customized skills training, finding employment opportunities with career ladders, and childcare subsidies.
- Explain the type of supportive services such as child care, mental health, health, financial literacy, transportation, and other services that will be utilized to support individual needs.



## **Section III – Performance Goals (Maximum 20 Points)**

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

- Complete the Performance Goals Matrix (SFP Exhibit K) for the target population(s). If serving multiple populations, complete a separate Exhibit K for each population(s).
- Analyze labor market information and explain how this informs the proposed performance goals in Exhibit K.

### **III.2. Performance Goal Measurements (Score range 0–5 points)**

- Describe all planned goals, including participant access to good-quality jobs and anticipated measurements of the MIT living wage standard in the local area.
- Describe how performance goals are tailored to the project needs and regional objectives and how the project goals will be measured.
- Provide a baseline to demonstrate the impact of the project on the target industries and the target population(s).
- Describe the goals to provide good-quality jobs in the in-demand sectors with wages that meet or exceed the local MIT living wage standard with measurable skill gains of at least 75 percent.
- If the planned project goals are not higher than the state’s negotiated WIOA performance goals for PY 22-23, provide an explanation that addresses the discrepancies.

### **III.3. Performance Goal Effectiveness (Score range 0–5 points)**

- Identify and describe anticipated employment and job quality outcomes in the in-demand 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.

### **III.4. Project Sustainability (Score range 0–5 points)**

- Demonstrate how the program activities will continue beyond the life of the project.
- Explain how the project will use appropriate technology, technological skills training, and internet resources to guarantee accessibility to all participants and which is replicable and sustainable beyond the life of the grant.
- Demonstrate how the project will continue to identify best practices beyond the life of the grant and implement lessons learned via policy development, service delivery changes, and access barriers removal.
- Describe how the strategies identified above will result in inequitable access to services in the workforce system and equitable employment outcomes for the targeted population(s).

## **Section IV – Partnerships and Leveraged Resources (Maximum 25 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 with 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 in place to ensure project success (meeting goals) in case any of the partnerships drops or does not come through during the period of performance.

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

### **IV.2. Employer Outreach/Recruitment (Score range 0–10 points)**

- Identify the outreach and recruitment methods that will be used to reach employers.
- Explain how employers were selected and how good-quality job standards were applied in the selection process.
- Demonstrate how new and current partnerships actively engage employers within the selected industry sector(s) to identify industry needs and employment opportunities for the target population(s).
- Describe participant employers' proposed commitments to creating equity and good-quality jobs in the in-demand sectors.
- Describe existing employer relationships and plans for developing new relationships related to the industries identified in the project.

#### **IV.3. Employer Engagement (Score range 0–5 points)**

- Describe how employer needs will be identified and incorporated in developing the sector strategy approach and each part of the project plan.
- Describe how employers will provide industry-based advice on curricula, career pathways, program delivery, and employment opportunities.
- Describe how partnerships will promote systemic change, sustainability, and replication of successful industry partnerships, leading to increased employment and retention.
- Explain how employer partners will contribute to the equity and good-quality jobs goals of this grant (for example, through strategies such as thorough onboarding, high-quality supervision and mentorship, career advancement support, ongoing training, and career development, diversity in hiring practices, diversity in the workplace programs, etc.).

#### **IV.4. Partnerships and Leveraged Resource Strategies (Score range 0–5 points)**

- Describe how the project will develop long-term working relationships with employers and other partners that will enhance the project's success based on the needs of the target population and service area.
- Describe how the project will build a network of employers, workforce partners, and CBOs to support job placement and close gaps in providing training to the target population(s).
- Explain how the partnerships will facilitate the provision of a full array of wrap-around support and case management services tailored to the needs of the target population(s) in the project area.
- Demonstrate that strong relationships already exist or are in the process of being established that provide opportunities for innovation, test new approaches, and adapt best practices to provide the target population(s) with opportunities to gain in-demand skills and obtain high-quality employment.

## **Section V – Statement of Capabilities (Maximum 15 points)**

### **V.1. Capability and Knowledge (Score range 0–5 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 have prepared participants for good-quality 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 0–5 points)**

- Describe the organizational infrastructure and capacity that demonstrates the ability to provide services to the target population(s).
- 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 10 Points)**

### **VI.1. Budget Plan (Score range 0–5 points)**

- Complete and attach the Budget Summary (Exhibit F).
- If applicable, complete and attach Supplemental Budget (Exhibit G).
- Explain how the proposed costs are necessary and reasonable in terms of benefits to participants.
- Demonstrate that the majority of 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 success of the project.
- 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 contained in the Supplemental Budget (Exhibit G) and how they will support the project's goals.
- Explain how the proposed costs are necessary and reasonable in terms of 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 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 Name] ETPF PY 22-23 [Exhibit]". For example, "UnityOrgXYZ ETPF PY 22-23 ExF" for Exhibit F. File names must not exceed 40 characters. Disclaimer: The exhibits have been updated for accessibility in compliance with the Americans with Disabilities Act. Exhibits must be completed accurately.

## Exhibit F Budget Summary

- The WIOA 15 Percent Funds column must contain the cost of each expense item and must total the requested grant funds.
- Under Amount Leveraged, enter the cash and/or in-kind resources identified in the Project Narrative (Exhibit A) and documented in commitment letters.
- 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, row P, using the same steps.
- Program Costs and Administrative Costs must add up to the total award amount.
- The In-Kind/Cash column in the Budget Summary Plan (Exhibit F) must equal the Total Cash/In-Kind Contributions in the Partner Roles and Responsibilities (Exhibit J) and commitment letters.
- The amounts entered for row P 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 subrecipients to carry out a portion of the grant services, Section II is the Supplemental Budget (Exhibit G) Section III: Subrecipients 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.

## Exhibit F2 Budget Narrative

- Provide a detailed justification in the Budget Narrative (Exhibit F2) for each line item cost contained in the Budget Summary Plan (Exhibit F). For example, a detailed justification of staff salaries should include the title or position, a narrative of the staff roles, responsibilities, or activities; annual salary; the percentage of staff time devoted to the project; and the corresponding portion of the salary charged to the grant.
- All explanations should include how the proposed costs are necessary and reasonable in terms of benefits to participants.
- **In section (A-D) Staff Salaries**, enter the total dollar amount of the Salaries paid and benefits charged to the grant (WIOA 15%) 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 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 (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 key staff are required to attend quarterly meetings, communities of practice, and other activities coordinated by EDD-approved TA providers; include all travel costs 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 with the asterisk symbol are based on the FTE for program staff).
- **In section G**, enter the total cost of Furniture and Equipment on the line provided. Refer to EDD Directives *Allowable Costs and Prior Written Approval (WSD16-16)*, *Property – Purchasing, Inventory, and Disposal (WSD16-10)*, and *Procurement of Equipment and Related Services (WSD17-08)* for Procurement Guidelines.
  - In line item 1, list the total amount of Equipment and Furniture items less than \$5,000 per unit, indicate lease or purchase, and include a cost allocation. In the indicated space, include the name, cost, and quantity of the item that will be purchased.
  - In line item 2, enter the total expense amount of Equipment and Furniture items greater than \$5,000. In the indicated space, include the item's name, cost, and quantity; if any items are listed in G.2., complete Exhibit G.
  - In line item 3, provide the estimated Equipment Lease dollar amount. Below the line item, explain the calculation.
- **NA- In section H**, enter the total estimated testing and instructional materials expenses. In the indicated space, provide a detailed description of the purpose and planned use of the testing and instructional materials.

## Exhibit F2 Budget Narrative, cont.

- **NA- In section I**, enter the total estimated budget for Tuition and Payments/Vouchers on the line provided. In the space under the section, provide a detailed narrative of the program costs, sector-specific training, certificate programs, and training costs for outside training providers.
- **NA- In section J**, provide the number of planned participants enrolled in WBL. List employers and industries offering WBL. The following activity codes are considered WBL defined in WSD19-06: 218, 219, 224, 301, 304, 308, 321, and 325.
- **NA- In section K**, state the planned number of participants to receive training and detail the type of training.
- **NA- In section L**, include the estimated cost of Supportive Services on the line provided. This includes gas cards, bus passes, housing, or any additional immediate assistance not available through any other source. Provide a detailed description of the specific services that will be provided.
- **Section M**, include the total cost of Contractual Services (Exhibit G, complete if applicable) on the line provided. Describe in detail.
- **In section N**, enter the total Indirect Costs on the line provided. The Indirect Cost Rate must be negotiated and approved by Cognizant Agency, per Appendices III or IV to Uniform Guidance, 2CFR200..
- **In section O**, list other expenses. Describe in detail the additional costs that do not fit into the specific categories in the prior sections.

## 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, the Supplemental Budget (Exhibit G), Section I: Equipment 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. Section II of the Supplemental Budget (Exhibit G) is for contractual services. Contractual Services must be completed.
- 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 for approval to the EDD. See Basic Considerations in OMB Uniform Guidance Section 200.407. Refer to EDD Directives *Allowable Costs and Prior Written Approval* (WSD16-16), *Property – Purchasing, Inventory, and Disposal* (WSD16-10), and *Procurement of Equipment and Related Services* (WSD17-08) 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.



### **Exhibit G Supplemental Budget- Section I: Equipment, cont.**

- 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 in the column 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."

### **Exhibit G Supplemental Budget- Section II Subrecipient**

- If an applicant plans to sub-award funds to a subrecipient to carry out a portion of the grant services, the Supplemental Budget (Exhibit G), Section III: Subrecipient must be completed.
- The Service Provider Name column must list the subrecipient's name.
- The Subawarded 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 Subawarded Amount column and select "Update Field" to populate the total award for each amount listed in the Subawarded Amount column.

### **Exhibit G Supplemental Budget- Section III: Contractor**

- 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(s) 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 I Project Work Plan**

- 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 impede the attainment of project goals. Describe the plans to overcome the barriers.
- Enter activities, start and end dates, deliverables, outcomes, and the partner(s) responsible for each anticipated program goal and milestone for each quarter of the project term.
- The Activities column may be used to describe the following, as applicable to the project: start-up activities, business partners selected to hire, outreach and recruitment, screening/enrollment/assessment, work activities (preparation/readiness, PWEX, transitional job, on-the-job training, WBL), DB 101 (Disability Benefits 101) benefits training, employment retention and follow-up, closeout activities, and other.
- Enter estimated dates or date ranges for each activity in the Start Date and End Date columns.
- The Deliverables column should list the expected results (for example, specific improvements in the workforce or service delivery system) of each item in the Activities column.
- The Outcomes column should describe the benefits participants will derive from participating in the planned activities.
- List the responsible partner(s) implementing the activities.
- To add rows, place the cursor between lines at the far left side of the table and select the "+" symbol.

## **Exhibit J Partner Roles and Responsibilities**

- List all partners in the Organization column under the heading the partner corresponds to.
- To add a row for additional partners, hover over a row in the far left and select the "+" symbol. Then copy and paste the preformatted rows into the newly added rows using the paste option "Overwrite Cells."
- Enter the contribution amounts pledged in the required commitment letters in the Cash/In-Kind Contribution Amount column.
- Right-click "Update Field" to populate the Total Cash/In-Kind Contribution cell.
- Roles and responsibilities should be clearly summarized in terms of specific tasks, services, or support partners will provide for each organizational type.
- A more in-depth description of roles and responsibilities can be provided in the Project Narrative.
- List the funding source under the Fund Source column for partners providing leveraged funds.
- Check "Yes" in the Partnership Agreement Letter column if a partner provided a partnership agreement letter.

## Exhibit K Performance Goals Matrix

- Complete and submit one Performance Goals Matrix (Exhibit K) for each target population.
- 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<sup>SM</sup>.
- See SFP Section III.E. for the state's WIOA Performance Goals parameters.
- 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.
- The Median Earnings 2<sup>nd</sup> the Quarter After Exit should be a quarterly salary, not an annual salary. If you require additional guidance on calculating median earnings, consult a reliable resource such as [Median Earnings in the 2nd Quarter After Exit - Overview](#).

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

## Commitment Agreement Letters

Applicants must provide a letter to verify the dollar amount and sources of contributions from each entity pledging cash or in-kind resources to the project. The letters should clearly define the parameters of the contribution and include the exact cash amount or an estimate of the in-kind dollar amount of the contribution. These letters' individual amounts and totals must match those listed in Exhibit J. 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 is encouraged to provide a letter that conforms to the stated guidelines.

Regardless of the source, all leveraged funds must be documented in a commitment agreement letter supplied by the funding agency. If the lead applicant is providing contributions, the applicant organization must provide a letter that conforms to the stated guidelines. Contributions mentioned in the narrative or documented in exhibits will not be considered official if no commitment letter is included to verify the leveraged funds.

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 name, title, and telephone number.
- Be dated within the grant competition period between November 3, 2022, and December 12, 2022.
- Be submitted together in one continuous PDF entitled “[Applicant Name] ETPF PY 22-23 Commit Letters”. For example, “ABCOrg ETPF PY 22-23 Commit Letters”. Names must not exceed 40 characters.

**Note:** If one organization provides cash/in-kind contributions for several aspects of the project, provide a clear, easily identifiable total. (For example, the Program Manager’s time has an estimated \$10,000. Our organization will also donate facilities for training valued at \$5,000. We will provide laptops for virtual training and distance learning valued at \$25,000. The total value of our organization’s in-kind contribution is \$40,000.)

Applicants that do not provide letters verifying leveraged funds will be deemed non-responsive and will not be considered for funding.

### **Leveraged Funds Details**

Applicants are required to demonstrate a minimum of 20 percent leveraged funds in relation to the total requested funds to be calculated according to the following example:

Requested Funds: \$250,000

Minimum Leveraged Funds:  $(\$250,000) \times (20\%) = \$50,000$

Leveraged resources can be leveraged from a 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. Leveraged funds may include other WIOA funds, provided this project’s scope falls under the allowable activities of those funds. Leveraged funds will be subject to the reporting requirements contained in *Quarterly and Monthly Financial Reporting Requirements (WSD19-05)* and Title 2 CFR Part 200: Uniform Guidance, Section [200.306](#).

The definition of “cash contribution” is a contribution of funds made available to the subrecipient to be used specifically for project activities and must be consistent with the allowable activities of the funding source. The awarded subrecipient has control over and disburses these funds. Examples include, but are not limited to, funding received from employers, foundations, private entities, or local governments.

The definition of “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.

### **Partnership Agreement Letters**

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

- Describe in detail the specific roles and responsibilities of each of the partners.
- 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 November 3, 2022, and December 12, 2022.
- Letters must be submitted in one continuous PDF entitled “[Applicant Name] ETPF PY 22-23 Partner Letters”. For example, “ABCOrg ETPF PY 22-23 Partner Letters.” Names must not exceed 40 characters.

Applications not attaching the partnership agreement letters from each partner included in the proposal will be deemed non-responsive and not considered for funding.

## **Appendix B: WIOA Allowable Activities**

The WIOA permits three career services: basic career services, individualized career services, and follow-up services.

### **Basic Career Services**

1. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs.
2. Outreach, intake, and orientation to information and other services available through the one-stop delivery system.
3. Initial assessment of skill levels, including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
4. Job search, placement assistance, and career counseling, including the following:
  - Information on in-demand industry sectors and occupations.
  - 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.
5. 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.
6. 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.
  - 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.
7. Provision of performance and program cost information pertaining to eligible providers of training services by program and type of providers.
8. 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.

9. 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.
10. Provision of information and assistance regarding filing claims for Unemployment Insurance (UI), by which the America's Job Center of California<sup>SM</sup> (AJCC) must provide "meaningful assistance" to individuals seeking assistance in filing a UI claim. The term "meaningful assistance" means the following:
  - Providing assistance on-site using staff who are well-trained in UI claim filing and the rights and responsibilities of claimants.
  - Providing assistance by phone or via other technology, as long as 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**

1. Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include the following:
  - Diagnostic testing and use of other assessment tools.
  - In-depth interviewing and evaluation to identify employment barriers and employment goals.
2. 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.
3. Group counseling.
4. Individual counseling.
5. Career planning.
6. 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.
7. Internships and work experiences that are linked to careers.

8. Workforce preparation activities.
9. Financial literacy services.
10. Out-of-area job search assistance and relocation assistance.
11. 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 continuing to improve 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 made available, not all registered participants and 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 leveraging funds 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 1: Allowable Costs Legend**

<b>Legend Key</b>	<b>Legend Key Definition</b>
A	Allowable
AP	Allowable with Prior Approval
AC	Allowable with Conditions
U	Unallowable
NS	Not Specified in the Uniform Guidance

If a cost item is denoted with two or more legend keys, users should research further into the various information sources as they may provide the additional clarity that is needed. 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 2: Cost Items Matrix**

Cost Item		Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
1	Advertising and public relations	A/U	A/U	A/U	<a href="#">200.421</a>	
2	Advisory councils	AC/U	AC/U	AC/U	<a href="#">200.422</a>	
3	Alcoholic beverages	U	U	U	<a href="#">200.423</a>	
4	Alumni/ae activities	U	NS	NS	<a href="#">200.424</a>	
5	Audit services	AC/U	AC/U	AC/U	<a href="#">200.425</a>	
6	Bad debts	U	U	U	<a href="#">200.426</a>	
7	Bonding costs	A	A	A	<a href="#">200.427</a>	
8	Collection of improper payments	A	A	A	<a href="#">200.428</a>	
9	Commencement and convocation costs	AC/U	NS	NS	<a href="#">200.429</a>	
10	Compensation – personal services	A/U	A/U	A/U	<a href="#">200.430</a>	
11	Compensation – fringe benefits	A /U	A /U	A /U	<a href="#">200.431</a>	
12	Conferences	A	A	A	<a href="#">200.432</a>	
13	Contingency provisions	AC/U	AC/U	AC/U	<a href="#">200.433</a>	<a href="#">2900.18</a>
14	Contributions and donations	U	U	U	<a href="#">200.434</a>	
15	Defense and prosecution of criminal and civil proceedings, claims, appeals, and patent infringement	AC/U	AC/U	AC/U	<a href="#">200.435</a>	
16	Depreciation	AC	AC	AC	<a href="#">200.436</a>	

Cost Item		Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
17	Employee health and welfare costs	A	A	A	<a href="#">200.437</a>	
18	Entertainment costs	U/AP	U/AP	U/AP	<a href="#">200.438</a>	
19	Equipment and other capital expenditures	AP/U	AP/U	AP/U	<a href="#">200.439</a>	
20	Exchange rates	AP	AP	AP	<a href="#">200.440</a>	
21	Fines, penalties, damages, and other settlements	U/AP	U/AP	U/AP	<a href="#">200.441</a>	
22	Fundraising and investment management costs	U/AP/A	U/AP/A	U/AP/A	<a href="#">200.442</a>	
23	Gains and losses on disposition of depreciable assets	AC	AC	AC	<a href="#">200.443</a>	
24	General cost of government	NS	NS	U/A	<a href="#">200.444</a>	
25	Goods or services for personal use	U/AP	U/AP	U/AP	<a href="#">200.445</a>	
26	Idle facilities and idle capacity	AC/U	AC/U	AC/U	<a href="#">200.446</a>	
27	Insurance and indemnification	AC/U	AC/U	AC/U	<a href="#">200.447</a>	
28	Intellectual property	A/U	A/U	A/U	<a href="#">200.448</a>	
29	Interest	AC/U	AC/U	AC/U	<a href="#">200.449</a>	
30	Lobbying	U	U	U	<a href="#">200.450</a>	
31	Losses on other awards or contracts	U	U	U	<a href="#">200.451</a>	
32	Maintenance and repair costs	A	A	A	<a href="#">200.452</a>	
33	Material and supplies costs, including costs of computing devices	A	A	A	<a href="#">200.453</a>	

Cost Item		Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
34	Memberships, subscriptions, and professional activity costs	A/U	A/U	A/U	200.454	
35	Organization costs	U/AP	U/AP	U/AP	200.455	
36	Participant support costs	AP	AP	AP	200.456	
37	Plant and security costs	A	A	A	200.457	
38	Pre-award costs	AP	AP	AP	200.458	
39	Professional services costs	A	A	A	200.459	
40	Proposal costs	A	A	A	200.460	
41	Publication and printing costs	A	A	A	200.461	
42	Rearrangement and reconversion costs	A/AP	A/AP	A/AP	200.462	
43	Recruiting costs	A/U	A/U	A/U	200.463	
44	Relocations costs of employees	AC/U	AC/U	AC/U	200.464	
45	Rental costs of real property and equipment	AC/U	AC/U	AC/U	200.465	
46	Scholarships and student aid costs	AC	NS	NS	200.466	
47	Selling and marketing	U/AP	U/AP	U/AP	200.467	
48	Specialized service facilities	AC	AC	AC	200.468	
49	Student activity costs	U/AP	U/AP	U/AP	200.469	2900.19
50	Taxes	AC	AC	AC	200.470	
51	Termination costs	AC/U	AC/U	AC/U	200.471	
52	Training and education costs	A	A	A	200.472	
53	Transportation costs	A	A	A	200.473	

Cost Item		Educational Institutions	Non-Profit Organizations	State, Local, and Indian Tribal Governments	Uniform Guidance Section	DOL Exception Section
54	Travel costs	AC	AC	AP	200.474	
55	Trustees	A	A	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 functions and activities constitute the costs of administration subject to the administrative cost limitation:

1. “The costs of administration are expenditures incurred by direct grant recipients, local grant recipients, local grant subrecipients, and local fiscal agents, and which are not related to the direct provision of WIOA services, including services to participants and employers. These costs can be both personnel and non-personnel and both direct and indirect.”
2. 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 California<sup>SM</sup> (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.

- **CalJOBS<sup>SM</sup> ([CalJOBS](#))**  
The CalJOBS<sup>SM</sup> 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.
- **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<sup>SM</sup> Workstation and Software Requirements






Figure 1: Workstation Requirements (VOS v16.x)

System	Hardware Required	Software Required	Connectivity
Client Workstation	<p>Processor: PIII or higher</p> <p>Memory: 2 GB of RAM or higher</p> <p>Display: Super VGA (800 X 600) or higher-resolution video adapter and monitor</p>	<p>Operating System: Microsoft Windows 7 Macintosh OS X v10. 4.8 (Panther) or higher</p> <p>3rd-Party Software (described after the table): Meadco ScriptX ActiveX 7.4/ Object<sup>1</sup>/ Microsoft Silverlight 3<sup>2</sup> DynamSoft HTML5 Document Scanning</p>	<p>Minimum: Dedicated broadband or high-speed access, 380k or higher</p>
Staff/ Administrator Workstation	<p>Processor: PIII or higher</p> <p>Memory: 2GB of RAM or higher</p> <p>Display: Super VGA (800 X 600) or higher-resolution video adapter and monitor</p>	<p>Operating System: Microsoft Windows 7 Macintosh OS X v10. 4.8 (Panther) or higher.</p> <p>JAWS for Windows software for visually impaired access (optional)</p> <p>3rd-Party Software (described after the table): Meadco ScriptX ActiveX 7.4/ Object Microsoft Silverlight 3 DynamSoft HTML5 Document Scanning</p>	<p>Minimum: Dedicated broadband or high-speed access, 380Kbps or higher</p>

## Supported Browsers

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



### Desktop Browsers

-  [Google Chrome | Download Latest Version](#)
-  [Mozilla Firefox | Download Latest Version](#)
-  [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

-  [Safari for iOS](#)
-  [Google Chrome for iOS](#)
-  [Firefox for iOS](#)

#### Android

-  [Google Chrome for Android](#)
-  [Firefox for 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 of the features in the Virtual OneStop suite.

**Figure 2: Third-Party Software**

VOS	v14.0	v15.3	
Adobe Acrobat Reader	v8.0+	v8.0+	<a href="#">Adobe Acrobat Reader</a>
Adobe Flash	v11+	v11+	<a href="#">Adobe Flash</a>
Meadco ScriptX	v7.4+	v7.4+	<a href="#">Meadco ScriptX</a>
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			<a href="#">DynamSoft</a> 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 you are using these unsupported browser versions, your browser should be updated to avoid compatibility issues.