

*The following revisions are based on comments and feedback from the initial release of these documents in late 2001 and from pilot transition area best practices.*

## **Summary of MOU Guidance and Template Revisions of 4/18/02**

### **Guidance Document**

- < Minor vocabulary and/or grammatical changes (i.e., Rehabilitative to Rehabilitation)
- < MOU Template Outline changes to certain headings and sub-headings
  - < **I. A.** from **A**Duration of MOU/Period of Performance@ to **A**Period of Relevance@
  - < **III. A.** from **A**Parties/Definition of Roles@ to **A**Parties and Their Roles@
  - < **V. B.** removal of **A**(InfoLink)@reference
  - < **V. H.** from **A**Termination@ to **A**Withdrawal@
  - < **VI.** from **A**Certification/Signature Page@ to **A**Signature Page@
- < Subsequent heading revisions in remainder of guidance based on above changes

### **Worksheet A - Partner Service Responsibilities**

- < Additional clarifying language in 3<sup>rd</sup> paragraph of Page 1.
- < New Page 2 introducing recommendations/suggestions for partner facilitation
- < Minimal revisions to the listing of Core Services on the worksheet
- < Corrected legend codes at end of worksheet

### **Worksheet B - Operational Budget/Partner Share**

- < Minor vocabulary and/or grammatical changes
- < Reformatted guidance to a step by step process

### **MOU Template**

- < Revision of overall document to tone down **A**legalese@ and format as a document of understanding between partners. Most notable changes in:
  - < **I. B.** Period of Relevance
  - < **V.D.** Information Sharing (reference to additional OAC cite at end of clause)
  - < **V. E.** Amendments
  - < **V. F.** Supplemental Agreements (recognizing the need for separate contracts)
  - < **V. H.** Withdrawal
  - < **V. I.** Non-Discrimination
  - < **V. J.** elimination of (7) Validity of MOU
  - < **VI.** Signature Page (clause revision)

## **Summary of MOU Guidance and Template Revisions of 5/02/02**

### **Worksheet A - Partner Service Responsibilities**

- < Modifications to the sample worksheet in heading and matrix areas

- < Additions and modifications to the abbreviated terms and acronyms
- < Minor formatting modifications

## **Summary of MOU Guidance and Template Revisions of 5/28/02**

### **Guidance Document and MOU Template**

- < Addition of Dept. of Labor grants/programs under AIII. Parties to the Memorandum@

## **Summary of MOU Guidance and Template Revisions of 9/17/02**

### **Guidance Document**

- < Preparation for the MOU section - updated information in final paragraph of Step 3 to include provision for a narrative describing cost sharing expense items.
- < Parties to the Memorandum section - updated the CSBG and HUD partners to reflect AEmployment and Training@ activities.
- < Provided further clarifying language in the Partner Services Responsibilities section regarding Cost Sharing/Resource Sharing.

### **Worksheet A - Partner Service Responsibilities**

- < Minor clarifying revisions on pages 1, 2 and 6
- < Minor revisions to the sample matrix:
  - ODJFS headings
  - modifications in listings of Core Services
  - simplified coding in matrix

### **Worksheet B - Operational Budget/Partner Share**

- \$ Expanded sample in Step One (pg.1) to include description of operating cost items.
- \$ Minor clarifying language added to end of page 2.

### **MOU Template**

- \$ Throughout the template all references to the Workforce Investment Board (WIB) includes a caveat regarding the reference be changed to the Workforce Policy Board (WPB) if in an Ohio Option subarea.
- \$ Modifications were made to the following clauses/sections:
  - < I. B. Period of Relevance (reflects new verbiage and renewal clause)
  - < III. A. 4. and 5. (f) (g) (i) and added note at end of section III.
  - < IV. B. 2. Cost Sharing Operational Budget (2<sup>nd</sup> paragraph references added narrative on cost sharing items description)
  - < V.D. Information Sharing (corrected OAC cite at end of clause)
  - < V. E. 1. (b) Amendments (added sentence at end of clause)
  - < V. J. 3.

Records  
Maintenance  
(added  
sentence to end  
of clause)

- < V. J. 6. Profiling (minor addition to clause)
- < V. J. 7. One-Stop Policies and Procedures (revision to clause, additional sentence at end of clause)

### **Summary of MOU Guidance and Template Revisions of 12/02/02**

*(Note: This revision represents an overall modification of the entire document based primarily on the DOL issued One-Stop Comprehensive Financial Management Technical Assistance Guide, the lessons learned from the transition pilot local areas, and from feedback provided at the various workshops on this document.)*

#### **Guidance Document**

- < Revised the preparatory steps (pgs. 3, 4)
- < Revised the MOU Template Outline Section IV (pg. 5)
- < Modified language in required partners section (pg. 7)
- < Modified the flow of the guide to reflect Methods of Referral and Customer Work Flow Diagram after Partner Services Responsibilities and before Resource/Cost Sharing. (pg. 8)
- < Revised verbiage on Cost Sharing/Resource Sharing (pgs. 9, 10)

#### **Worksheet A - Partner Service Responsibilities**

- < Removed section on additional program budget (pg. 1)
- < Format revisions to (pgs. 1, 2, and sample format)
- < Added attachment references to bottom of sample.

#### **Worksheet B - Operational Budget/Partner Share**

- < Renamed Worksheet to **Resource/Cost Sharing Agreement**
- < Revised entire section (Steps, Sample, and Worksheets) to more closely follow in verbiage and practice the guidance from the DOL One-Stop Comp. Financial Management TAG.

#### **MOU Template**

- < Minor verbiage revisions to the required partners section. (pg. 3, 4)
- < Modified flow of template putting Methods of Referral and Customer Work Flow Diagram after Partner Services Responsibilities and before Resource/Cost Sharing.
- < Removed section on additional program budget under Cost Sharing (pg. 5)
- < Revised Resource/Cost Sharing Section (pg. 5)
- < Added clause to end of E. Amendments. (Pg. 7)
- < Updated references to various Attachments to match with changes on Worksheet A.