**WorkforceGPS**

**Transcript of Webinar**

**2018 Round 4 TAACCCT Close-out**

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JONATHAN VEHLOW: Welcome to understanding grant closeout for TAACCCT round four. So without further ado, I'd like to turn things over to our moderator today, Cheryl Martin, program manager, U.S. Department of Labor, Employment and Training Administration. Cheryl?

CHERYL MARTIN: Good afternoon or morning, depending on where you are, and welcome and thank you for joining us. It's great to see all the familiar names and some not so familiar names and in the welcome chat. We really appreciate you joining us for this. This is an important time to figure out where we're headed for the next few months and the last months of TAACCCT round four. So thank you for joining us.

Today with us I also am joined by Lauren Eyster who will be speaking a little bit about third-party evaluations. She's from Urban Institute. I am also joined by Meron Assefa and Kevin Brumback who are form our Closeout Office. You will be working with them and their team of closeout specialists when it comes to the end of the grant.

So they're here today to answer some questions. We also have some other folks on the line who may get called on, Scott Estrada who's our performance specialist and various other folks from TAACCCT Learning Network. Christian Lagarde I think is on. So we are prepared to answer pretty much whatever you can hit at us, and if it seems like something more appropriate to answer individually, we'll let you know that as well.

Let's go back, though, to those first four polling questions before we move forward because I noticed that you – some of you were pretty honest on those questions. The first one here it looks like about 40 percent or so of you were part of a previous TAACCCT grant and 60 percent were not.

So for those of you who were part of a previous TAACCCT grant, if it was a round three and you were in a consortium, this is a little bit different. We'll get to that later. If it was a round one or two and you were in a consortium, it's the same, and if it's – if you're a single institution, it's the same. So just wanted to make sure we make some of those kind of differences because, of course, we always have to do things to keep everybody on their toes; right? Do it just a little different each round just for fun.

OK. The second question, did you review the round three closeout webinar before you viewed this one? We asked you to do that. We tried an experiment here. Rather than going through every single question on that one, we thought let's see if we can sort of flip this classroom and give you the information ahead of time and we'll take this time for questions.

So about 20 percent of you did that thoroughly and about 50 percent of you did that somewhat and 30 percent of you are honest and you didn't really. So that's okay. It just means that you are going to want to go back probably and grab the answers to particularly a lot of the more detailed questions about closeout from the round three webinar because nothing has really changed about closeout from that except for the dates that you'll see on this webinar.

Our third question is, what part of this webinar are you most interested in learning? And we've got a little bit of everything here. So yeah. We'll be going over the overview and then we'll be going into everything else and a couple of you are very honest. You have no idea and that's why you're here and that's why we're here too, for the people who have no idea, as well as those who have some ideas but still want to get it confirmed.

Finally, our last question was, have you dedicated staff to cover the responsibilities of the last six months of your grant? And most people have there. So that's great. Obviously, things change a little bit after March 31, but the grant still continues. The period of performance ends on September 30. Just depends on – the difference is just what you can use your grant funds to do during that time period, but there are definitely roles that you're going to want to have covered during that time.

And we understand that there's a lot of turnover during this time for grants in general and maybe for this one in particular because of that six-month thing. So you're just going to want to make sure that all the things that need doing are set up so that somebody will do that, whether it's during that last six months or even after that during closeout. And we've got a little checklist for you today that will help with that and obviously some slides and tips and things like that. So that's what we're here for.

So let me go briefly to the agenda, and let's see. We made it through those questions. Whoops. Sorry. Here's our agenda. So I'm going to – there's going to be four sections of this webinar. It lasts 90 minutes, if we need it. If we don't, we will certainly stop sooner. We're not going to go into all the nitty-gritty details that we did last time. So some of the questions that you ask us, we might say, hey, let's take that offline or we covered that last time.

Please take a look at the last webinar. But in general, after the overview section and then the grand deliverables section and that performance report and other numbers section as well is at the end, we'll have four different times where we'll pause and we'll take your questions. So if you have any questions, please type them into the question section, and we will pull those up and answer as many of those as we can get to today.

All right. So let's move into our overview. This is a slide you might want to print out and stick on your desk or something. I don't know. Above your desk. This is the key dates for TAACCCT round four. Some of these you're very, very familiar with. The start date was a long time ago. The interim third-party evaluation should have probably been submitted some time ago, per your evaluation plan. That would be submitted to your FPO. And where we are now, we are here. We are at about 40 – a little bit beyond 40 months into 48 months of the entire grant period today on February 8th. A couple of – so the key things that are going to happen after this are as follows.

One is we will be, once again, sending out data validity letters in early spring, and what that means is we'll send you – each grantee a letter that says, hey, just want you to double check that you did the numbers this way and not that way. And sometimes we'll say really specifically, look at this specific thing, and sometimes we'll just give you some general tips.

But we have found that it's helpful to do that in terms of getting the numbers correct, and that will be data validity on what you submitted by November 14th, 2017, after your year three. We're looking at all three of those years. We're looking across the three years. We're looking at year three individually, and if we ask you to take another look at that – (inaudible) – do that, and that will be self-explainable when it comes.

As you all know probably, the end date for grant funded program activities is March 31, and that's – that doesn't mean it's the end of the grant. It means that it's the end of when you can do certain things; right? So the general idea there was that grant funds are seed money, and you should be able to continue those program activities after March 31. You just can't use grant funds to do it; right?

So if you're offering a class spring semester, after March 31 you can't pay the professor for that anymore, but hopefully you're still offering the class and that you've set it up ahead of time so that you have another way to fund the professor and whoever else you need for that activity afterward, as well as all the activities that you are able to sustain through the grant. The general idea with this was that, rather than stopping it on September 30, we were going to let you complete the fall 2017 semester, do your placement during this last quarter. So that was the idea there, although not everybody's on a semester schedule either. So some of you can finish a certificate or something before March 31.

In the last six months then, you are using that for data gathering, reporting, your third-party evaluation, finalizing that, and posting your product deliverables. All of those are things that you can use grant funds to do during the last six months of this grant. Then the period of performance ends on September 30, and that is the same day as your third-party evaluation – your final third-party evaluation is due. It's the same day as your deliverables should be posted to SkillsCommons no later than then, and of course you can turn in your third-party evaluation earlier than that too. It's just the last day that it's due, and it's the last day of the grant, last day you can pay anybody to do anything using the grant.

The usual submitting of the APR, QNPR, 9310 financial information, that's the usual 45 days after that. So that will be November 14, 2018, and that is simultaneous with your closeout period where you will be turning in all of your closeout documentation in the last 90 days from October 1 to December 30. We'll go into all of that in a little bit more detail, but that's the big picture of that for right now.

Some key closeout differences for round four, first of all, like I said, there's no differences for single institution grants. For consortiums, if you were part of round three – and this only applies to you if you were part of round three – there was this quirk for round three that each consortia member did it – had its own grant number and received a separate closeout letter and conducted closeout – physical closeout separately.

That was only for round three. For round four, once again, we go back to the way we did it in one and two where the consortium leads will have the joy of coordinating all of those closeout – all the closeout information. They will gather all the needed information, whether it's fiscal or your APR or your QNPR or your deliverables or anything like that. All of that is done by the consortium lead.

OK. Just wanted to mention a little bit about staff transitions. As I mentioned before, we're aware that people are likely to have some staff transitions on their grants, for any grant but perhaps particularly for TAACCCT because of the March 31 business. And so we realize that staff transitions are inevitable now. That's why we worked really hard to do this webinar now so that you have a good six weeks before the end of that time period to make sure that you've got everything lined up after that.

And this webinar is to tell you what all you need to have lined up. So it's just really important to make sure that you have either new staff that are coming in or existing staff that might be taking over a different role or something like that, but everybody's prepared, that all your consortia members know what they have to turn in and by when. So you're going to want to come up with your own timelines and checklists for them, if you're a consortium, and that they know who to turn things in to and who's in charge of what.

We have a little transition planning checklist to help you as you move into your last six months of the grant, and that is in the file share window of this webinar. It will also be posted on the page that has the webinar on it, when you come back and you can look at the transcript for this webinar. Yes. We will send you out the slides, post the slides. We will post the transcript. We will post an executive summary, and we will post every single document or link that we tell you about today will all be in that one place on the page for today's webinar.

Just in terms of that staff transition checklist – excuse me – a couple of key things that – a few examples of what you'll see on the checklist. There's more. You'll want to develop a plan for all your major deliverables and activities in the last six months. You'll want to identify roles, who's going to do what and how long they'll be around and that kind of thing. You're going to want to ensure that you have a clear transfer of knowledge, not just people who need to finish out the grant but people who are maybe taking over activities that are being sustained by the grant.

And you will need to identify somebody who's not funded by the grant who will have knowledge of the programmatic and fiscal nature of the initiative. In other words, starting October 1 when you're in closeout and you maybe ask questions and you have to turn in your fiscal reports and your QNPR and your APR, you need to make sure that there's somebody, typically somebody on overhead who's ready to do that and basically has all the answers to all those questions ready to go. That will make everybody's life a lot easier then. So take a look at that checklist, and make it your own. Turn it into something that you can use with your consortia members or anybody else involved in your grant, if you're not a consortium.

Here's one point we really want to make about updating your contacts. So one of the things – and I think this is on the checklist. If not, it should be. The – you'll get an initial letter from your closeout specialist sometime in August, and it should actually say an e-mail because it will be sent via e-mail to the three people listed there, your authorized representative, your SF 424 point of contact that's listed on your SOW or whatever has been updated since then, and then perhaps there might be another main point of contact that your FPO has on file.

We try to send it to – or the Closeout Office tries to send it to all three of those folks. They also send it to your FPO, this closeout e-mail. It comes from one of those automated e-mail addresses. So it's not from the TAACCCT mailbox. It's from something else more automated, which I forget exactly at the moment, but the point is to start looking for it in August and to make sure that you have the right people on here.

If your authorized representative – if your college president or your provost or whoever is the authorized rep that you put in the original grant, if they've changed since then and you haven't done a mod to change that for some reason, now is the time to do that because both the SF 424 point of contact and the authorized rep require mods to update. It's a very easy mod to do, but it does require a mod. So now is the time to do it. Get those names right so that you make sure that the right people get that e-mail because a lot of times what happens is the e-mail doesn't go to the right person and then people are waiting around and going, where's my closeout? Where's my closeout? Well, it's sitting in – out there in the ether somewhere where it shouldn't be. So really encourage you to take care of that now.

Moving on to the business about telling the story of your round four TAACCCT grant, this is really the fun part, and we really, really enjoy hearing from you. We've gotten from a number of folks. We've gotten one-pagers or infographics or 12-pagers that maybe have a page for each member of the consortium or something. Various – we've gotten videos. We've gotten stories that you did of your participants and how their lives were impacted or your employers, all of that kind of stuff.

You don't have to turn that in to us, but we would love to see it. So if you have those kinds of things and you have them now already, just send it now. Just send it to the TAACCCT mailbox. Copy your FPO on it so they can share in the joy too and please just share that with us because we are using those for various things and it really makes our day to hear those kind of stories. So we want to make sure, if you've done all that work to create it, that you share it with us as well as everybody else you've been sharing it with.

We're going to talk – now, I'm going to turn it over to Lauren to talk about your third-party evaluation, which is of course another way of telling the story of your TAACCCT round four. So, Lauren, you want to talk a little bit about your final third-party report, please?

LAURA EYSTER: Yes. Hi, everyone. So I just wanted to run through a few key things to keep in mind, and the one you've already heard before, which is the due date of September 30th, 2018. I – with – and discussing this with your third-party evaluators is really important because ensuring that you have all the data they need to produce that final report in time is really important. So just keeping that deadline in mind and when final data are needed for that final report is key.

We do have available – and it's with this presentation as well, the materials that DOL has talked about – the report guidance that's specific to round four on how to develop your third-party evaluation report, all the due dates, where to share it online and more publicly, especially SkillsCommons, and just be sure to review that thoroughly as well as share it with your third-party evaluator. It will also be posted to the TAACCCTeval.org website in addition to the other places that DOL is talking about today.

Also, on the TAACCCTeval.org website is the recommended executive summary outline. Your third-party evaluator may have already seen this. We've shared it before, but be sure to point them in that direction because it really helps us as the national evaluators as we move ahead to synthesize the findings across all the third-party evaluations and be able to share that more widely as well as it helps folks who are looking at your reports and may be looking at several of the third-party evaluation reports to be able to look across and understand some of the similarities and differences in the project's implementation as well as in participant outcomes. So it's just great for you all to use that. Round three really – grantees really used that frequently, and we truly appreciate it when that happens for many reasons.

Also, on the TAACCCTeval.org website you and your third-party evaluator can find webinars on developing final evaluation reports. There's a round three one that we recommend you and your third-party evaluator review. It provides tips and ideas on great ways to present findings and really develops an effective final report on your TAACCCT grant. There's also a webinar on data visualization and examples from previous third-party evaluation reports that you and your third-party evaluator can use and can really help you in developing that.

And finally, we recommend and tell you to post the final report to SkillsCommons.org, and it's such a great place to share it. We also recommend that you and your third-party evaluator share the findings more widely if you're presenting to your colleagues, if you're presenting at conferences, and getting those findings out there that can be really helpful to others trying to implement similar approaches. That is all for the better good.

So for questions that don't get answered today that come up later, you can reach out to your federal project officer or TAACCCT@dol.gov about the grant requirements, about the submission – (inaudible) – official grant requirements that you may have questions about. But for information and advice on the final evaluation report, whether it's from the grantee or the third-party evaluator, please feel free to reach out to us at the national evaluation team at TAACCCTeval@urban.org. And with that I'll turn it back over.

MS. MARTIN: OK. Thanks. Thanks, Lauren. I do want to emphasize that, when we say that it's due by September 30, that doesn't mean that the third-party evaluator should turn it in to you as a grantee by September 30 and then you get another however many days for internal review and all of that kind of stuff. It means it's due to us by September 30, DOL, and specifically to submit it, you should be submitting it to your federal project officer and to the TAACCCT mailbox at the same time.

So to submit it, that's what you do, and then you should also post it on SkillsCommons, that kind of thing. So that means that, if you need to have internal review, which nearly everybody does, you need to get it from your third-party evaluator in time to do that internal review before you submit it – before you finalize everything and submit it to us. So hope that's not a surprise to anybody, but that is the deal, and can't really – don't have a lot of flexibility on that, unfortunately.

So I am going to do one more slide, and then we'll see if there's any questions here. I just wanted to let you know that there's a whole FAQ document, and you can see the link there on the slide, that we put out. It's the same as the FAQ document before, and there's a whole section in there that has to do with closeout and submitting deliverables and all of that. We have not changed any of that since last summer – or maybe it was even the summer before.

Anyways, since the last time we did this webinar we haven't changed any of it. So I'm not going to go through it, but it will tell you things like, oh, wait a minute. What can I pay for with grant funds after March 31? Or what am I doing in that last six months? When does the closeout process begin? What's allowable costs? What is the latest date that final bills need to be submitted? All that kind of stuff and a whole lot more is in this document, and so you will definitely want to keep that at your fingertips. It's kind of long. So if you print it out, put a lot of paper in there. You may want to just keep it online.

Anyway, going to go to questions now about this section. So if you haven't asked your questions yet, let us know. I see one question here, and the question I see so far is, "The Consortium final performance numbers may not align with the third-party evaluation report due to the timing required to prepare their report and the data that gets reported a little bit after that. Is this a problem?"

So that is understood that that may be the case. So, for instance, you might have to stop your data collection for your third-party evaluator as of – I don't know. I'm going to make up a date here – May of 2018 so that they can write everything and get it to you and review it and all of that. And then of course you may get some more UI wage record data in after September 30 or about the time that you're ready to submit your final APR report. That's okay. Just please make a statement to that effect in your third-party evaluation. Just say these numbers are different and here's why and that's understandable. Nobody expects them to all be the same.

I will say now and I might repeat this later but you can also – you need to turn in your final APR by November 14th, 2018, but if you – just like with the other rounds, if you get some updated wage record data after that, you can still request of us to reopen your record and update it because of that. We understand the data lag with the wage record data in particular, and so you can still reopen it after that and update that, if you want to. Just let us know that you plan to do that. So anyway, we understand that those numbers might be different. Just tell us if they will be different.

And another question, "During the last six months can funds be used for tracking, reporting, and evaluation at the sub-award colleges or only at the consortium level?"

They can be used at the sub-award level as well. In other words, your consortium lead or any consortium members can be doing that tracking, that reporting, and that evaluation. As long as those are the activities that you're doing, it doesn't really matter where you are doing it in terms of whether it's an allowable cost for that last six months.

And another question, "Can you please restate where the location of the transition checklist is located?"

You can find it right now in the file share box, which is probably below the closed captioning on your screen there. Anyways, it's somewhere on your screen. It's called file share, and it's the third document there that says TAACCCT transition planning checklist final. It will also be on the webinar page afterward, but you can get it there now.

Question four, that is a performance question, and I'm going to save that one for a little bit later.

So do I have – John or Scott, do I have any other questions that I should be addressing now? I don't see anything else. So we're going to move on and save that performance question for a little bit later. We are now going to go to the question about product submission.

So we already talked about your third-party evaluation, but this is now about the products that you – and deliverables that you are submitting by posting them on SkillsCommons. So it would be, for instance, all of your educational materials, whether that be curriculum or other program support materials and that kind of thing, and it also applies to posting your third-party evaluation on SkillsCommons. But I'm going to be focusing a little bit more on the – what we call the grant products and deliverables right now.

So if you are one of those folks for whom this is all new, you're going to want to go back and take a look at the SGA, the solicitation for grant application, as well as the FAQs, the frequently asked questions about what is it that I'm supposed to be turning in, because you don't want this to be a surprise. You need to turn – the government has now paid you to develop all of these products and deliverables, and as part of the deal with this grant, we are sharing them with the rest of the world to be able to use them.

And we are getting such overwhelmingly positive response to that. Every month the number of people who download products and deliverables from SkillsCommons has gone up. We have – it's gone up every month for the last – I don't know. We're at 50,000 a month, and it just keeps going up. So we are somewhere over 700,000 or 800.000 – I forget what right now – downloads that we've had from the website.

So these are wildly popular things, and people are waiting for your round four products and deliverables, some of which I know are already posted but a lot of which are still coming because you've had – in some ways there's time to develop really cool things by this time, and maybe some of them built on round three or round two. And so people are really excited to see what you've got in particular. So you put them up there under this Creative Commons attribution CC BY license, and that includes all new content created with the grant funds and modifications made to pre-existing grantee-owned content using grant funds. And there's more details on that on the website and in the FAQs.

Another thing is you have to do – before you post a final posting of it, you have to do a third-party review of those deliverables. This is not the same as your third-party evaluation. That's an evaluation. This is a little bit more like a journal review of an article or something like that, although it's not quite that extensive and time consuming but it does mean that you need to obtain third-party reviewers for all of your major deliverables and you need to have those reviews posted along with the curriculum.

So again, there's information on SkillsCommons.org that tells you all about how to do this. It makes suggestions about, well, who can I go to, for instance, another college in maybe your consortium but somebody that didn't develop this curriculum but they have that expertise. And you can use grant funds to compensate people for their time to do those reviews. So that is not something to wait for until later because that is not something that takes days. That takes weeks, months even.

Right now is when you should be setting up and making sure you know exactly all the deliverables that you'll be submitting and what – who's going to be reviewing each of those deliverables. It might be different people with different expertise because it's supposed to be subject matter experts. And so if you have advanced manufacturing and healthcare, you're going to need different experts to review those materials. So you should be getting that all in place right now and know who's going to do that and how that's going to happen.

The – we have support. We have really good support on SkillsCommons.org. The first thing to do to access that support is to register. If you have not yet registered your grant and said, okay. It's going to be me. I'm the one who's going to upload this stuff and register this. Once you've done that, then you can access the support that's there. I mean, you can access all the support that's on the website now, but you can access people support. We call it 1-800-Rick Lumadue, and this is managed through our Cal State cooperative agreement with Cal State Merlot. And there's real people that can help you with this as well. So the idea here is do not wait. Begin uploading. Begin figuring out what you're going to upload and figuring out how to get those reviews done.

So now, I'm going to answer questions about those deliverables. The first question that I see is, "Can products developed after a close – after the project closes from sustained projects be uploaded into SkillsCommons?"

So yes. If you were – for instance, if you were a round three grantee and you uploaded your products and deliverables as they were and then you revised them in the year after that because you sustained it and of course things changed in the IT world or the healthcare world or the advanced manufacturing world or any world you're in, yes. You can upload revisions to that, and we would love it if you would do that.

Only projects that were originally part of a TAACCCT grant can be put on SkillsCommons for right now. Merlot is going to keep – Cal State Merlot is going to keep the website available even after September 30, 2018, and how that all works in terms of what can be loaded up there after the period of the grant will be up to them. But certainly, anything that's updating a TAACCCT grant could be – would – you can update, and we would love to have you do that.

Another question, "We can pay people at colleges to do reviews and uploads; right, not just at the consortium level?"

That's correct. I know that there are some grants where the – it's the role of – there's a consortium lead, but it's the role of one of the consortia members to do all of the collecting of all those deliverables and to upload them to the website. And that's just how they allocated it. They gave it to one of their consortia members to do that, or maybe it's split across a number of different consortia members.

So yes, you can pay people at consortia members to do those reviews. Now, the reviews are supposed to be third-party subject matter experts, not – the prof who wrote it shouldn't be reviewing their own stuff. It should be some other person who wasn't involved, somebody impartial and third party. But yes. It could be at one of the other colleges in the consortium or some other sister, brother college or whatever in your state or area or wherever you find the experts.

"Do the deliverables need to be sent anywhere else aside from the SkillsCommons posting, such as the TAACCCT mailbox?"

Oh, that's a good question. We can post that question up there in the question being addressed. You do not need – aside from the third-party evaluation, which we want you – officially, the way you would submit that is to send it to your FPO and copy the TAACCCT mailbox and, if you can remember all of this, copy TAACCCTeval.org as well. That would be the ideal world. If you just send it to the TAACCCT mailbox, we'll make sure everybody else gets it, but that's how you officially submit your third-party evaluations. And then we would also like you to post it on SkillsCommons. There – what do I want to say here? To be honest, we will probably post it on SkillsCommons if you don't, but it would be great if you just posted it as part of your materials.

The rest of the things you post, we do not want them anyplace else besides SkillsCommons because those are huge files and a lot of stuff and that's why we developed SkillsCommons. So we don't want to really see it anyplace else besides SkillsCommons. Now, I mentioned earlier some of those videos you might have done or some of the storytelling that you've done, if you've got an infographic or something like that. We'd love to see that at the TAACCCT mailbox and also posted on SkillsCommons, but all of that curriculum and all of that, that only goes on SkillsCommons.

"Can paying people for those reviews of the curriculum and so forth, those deliverables be done after March 31?"

Yes. They can be. That – if you look in the FAQs, that's one of the things that you can do between April 1 and September 30, and it's an allowable cost during that time.

I am looking at, "What is the status of having TAACCCT grants access to unemployment insurance reports for APR or evaluations?" Let's do that during the performance time. I'm going to hold that one a little bit.

And then there was a – one more question here, at least for now. "Just to clarify Cathy Kirby's (sp) question, I can use a consortium college SME to review another one of my consortium college's educational materials? What if they are already part of TAACCCT projects?"

You could use – they should be independent. So yes. You could use a different consortium college, but they shouldn't be the people who developed the curriculum. It's kind of like grading your own test; right? So it should be somebody who's an expert but who is not directly involved with that part of the curriculum. Let's say you've got healthcare going on one place and advanced manufacturing going another place. Sure. You can find an SME on healthcare at the college that does your advanced manufacturing part of the grant or something like that.

OK. So I think we've answered most of the questions there, and we'll save a couple of those for performance, which is actually the section that we're going to go to now.

So I'm going to say a few things here, but I want to say up front that we are going to do another series of performance reporting webinars for TAACCCT round four now that we're – we've got the last round of reporting in our sites. It's the light at the end of the tunnel there. So we will go into a lot more detail on all this business about what to report in that webinar. So I'm going to go over a few things here but not all the details.

First of all, I mentioned before about receiving data validity letters in early spring. So that will happen, and you should use the consolidated FAQ document that's dated August 2016. It hasn't changed since then. You can get a lot of your questions answered about reporting in that document.

Just to give the overview here, you will have final progress reports, and so that will be your last QNPR, quarterly progress narrative report, and your last APR, your annual performance report, and those will be due on November 14th, 2018. So as in the past, consortium leads will gather all that information and report for the entire consortium. The final QNPR will provide – now, here's where there's one little tiny exception about this cumulative thing. We want both quarterly and cumulative information in your QNPR only, only in your QNPR. We'll get to that in a little bit more on the next slide, but the final annual performance report will provide, as always, only annual information on your grant activity for the fourth and final year of the grant.

So you do not add up all your participants. You do not add up anything. You only tell us what happened between October 1 and September 30, 2018. Well, I guess you do have to add to do that; right? But what I mean is you don't include any information from previous years. The system will automatically aggregate all those four years in the thermometer report to provide cumulative data, and you should check that thermometer report to make sure that it adds up to what you think you did for all four years. And then if it doesn't, work it out and figure out what's wrong there. Let us know if you're having questions about it and we can help you with that but it should only – your numbers should only be for the fourth year.

When to report. Like I said, November 14. Same as it always has been, and both of those are both due on the same day, November 14th, 2018, 45 days after the end of the grant. That doesn't mean that you can't get everything in place and have pretty much everything all ready to go, except for some of those lagging indicators maybe, before that. And you should, but that's when you will – that's when it's due.

What to report. So this is where I said there's this little exception about cumulative. On the quality – sorry – quarterly narrative progress report we do want you to tell us both for that year and cumulatively. So, for example, you can say, this quarter – I'm sorry. Not for that year. For that last quarter and then for the whole time. So for this last quarter you could say one new employer was – expressed interest in hiring graduates and this one new employer in this last quarter, but cumulatively we had a total of seven employers or 70 or 352 or whatever it is that hired graduates throughout the grant period. So that is the only place where we want to see anything cumulative, and if you're confused about that, please contact us on the TAACCCT mailbox.

We'll get back to you about that, but like I said, final annual performance report, only the activities since the third year APR. So only your fourth year program activities. Now, there's this other little thing in here about B.8 and B.9 activities that occur during the closeout period. I am not going to go into that now. That's in the FAQs. It will make more sense if you look at it there and if you come to our other performance reporting webinar on this.

And now, I'm going to answer the questions that I said – well, Scott or I will, the [inaudible] was about performance. So, Scott, do you want to take this one? "We can count employment occurring between 4/1 and 6/30 if they earned a credential in 1/1 to 3/31; is that correct?"

SCOTT ESTRADA: Yes, Cheryl. That is correct. After – starting April 1st and in – you can continue to count the follow-up outcomes, if they've gone on to further education in B.7 or their employment outcomes which are B.8, B.9, and then also wage increases, since this was an allowable activity, was tracking these folks for those last six months. I just want to add that there are conditions to that, of course. For B.8 for employment, you do – if they earn the credential – they have to earn the credential before March 31st and be a completer. It has to – the employment outcome has to have occurred the quarter after the quarter of exit, and they had to have exited. So even though you can't allow – you are tracking these folks and if that occurs between April and September, that's – you can count that, but just make sure that they're still meeting those other two requirements beyond just earning a credential.

MS. MARTIN: Thank you, Scott.

So we have another question here. "What is the status of having TAACCCT grants having access to unemployment insurance reports for APR or evaluations?"

So there was never a situation where TAACCCT grants got access to that unemployment information like some of our other grants. You turn in your participant-level data and we send it off someplace and they do that matching for you. That never was possible with TAACCCT because you don't give us participant-level data.

That's not how it came out to be required. So it is a situation that every grantee is responsible to do their own tracking of employment outcomes, including getting access to unemployment insurance reports from your state, to the extent that that's possible. We understand that for some it's been very, very challenging, and some of you are still just in the process of making that happen and all of a sudden magically you are going to get all of your UI data right before the end of the grant. We've heard about that from some. So that will be exciting.

There are other ways to count people that are employed besides having to have the wage record data, and there's a whole little packet on that. Scott, can you mention what that's called and maybe we want to add the link to the performance reporting page somewhere on here? There's a performance reporting page that has all – everything you want to know about performance reporting. There's 8 or 9 or 10 or 12 or something different resources, and one of them is the information that you can use to say, hey, how can I validate or prove that I – these people were employed? What can I use as proof? Scott, do you want to mention anything about that?

MR. ESTRADA: Yeah. So we do have a resource card that's called the source documentation toolkit, and that is just guidance on what kind of other alternative documentation you can use to prove that you – these students are earning employment. So a paystub, beyond just wage records. Also, what's included in that is also notes.

So if you have a college navigator that's doing this tracking and they are in communication with a student and the student says that they got a job, those notes are valid under that documentation. So we – because of this difficulty of getting wage records for a lot of these grantees, we want to provide alternative options for being able to document that so that you know that, when you count your B.8 numbers and your B.9 numbers and B.10 numbers, that you're confident with those numbers. And that is – I'm about to post the performance resources now, and you can find that near the bottom of the list of resources on the master page.

MS. MARTIN: Great. Thank you, Scott.

I am going to come back. Wait. I wanted to say one more thing about that, which is we also have just been doing TA and have a little checklist, a different kind of a checklist, actually, for people. Like if you're looking at trying to track those employment outcomes and you're having some lunges with that, we have some help on that. So if you are new to this and – or if you're just like, man, I'm just really struggling with this and I want – I know that the numbers are out there. I just can't find them, and what can I do? Just shoot us an e-mail at the TAACCCT mailbox. We'll get back to you with some additional information and some technical assistance to help you with that as well.

OK. I am going to come back to this question, this [inaudible] question where she said, "Just to clarify Cathy Kirby's question, I can use a consortium college SME; right?" And then Lisa said, "OK. But do they get additional TAACCCT money to do their review?"

Well, they can, if you can give it to them. We don't have any more money. We already spent it on all of you. There is no more money to give out in TAACCCT grants. So it would have to come out of your budget one way or another. Maybe there's something left in one place that you can move around, and that would be the kind of thing to talk to your FPO. But if you want to do that, you should do that sooner, much sooner rather than later because you can't do mods for very much longer on that kind of thing. But if you have money, you should – in essence, you should have budgeted for that somewhere, and hopefully, you can find the money somewhere to do that.

So Scott just posted the resource there for TAACCCT performance key resources. A lot of good stuff on that page. We're going to move on to the next subject now, which is grant closeout process itself. This is the process that starts when you get that e-mail in August and then on for up to 90 days after the end of the grant. And we have a test for you on that. You told us that you watched that other webinar, some of you, and we're going to see – so we're going to just start with a few friendly little questions. So, Scott, I'm going to turn it over to Scott to do the knowledge check, and I think, John, that we were going to do this so we don't show who's answering what until we give them a chance to answer.

MR. VEHLOW: That is correct, Cheryl. Tell me when you want to broadcast those answers.

MR. ESTRADA: Thanks, Cheryl. So yeah. We – just to let you know, this webinar is going for – until 2:15 Eastern Time. So we've got about 25 minutes. I'm sitting between Kevin and Meron at this conference table right now. We want to make them available to you all to answer your questions. That's why we asked you to review the round three webinar because that information is almost exactly the same, the only difference being is the change of dates, whether it's – instead of September 30, 2017, it's September 30, 2018, for example. So for those of you that did review or those of you that didn't review but may know the answer, we wanted to do just a little bit of a knowledge check based on that information that was presented in the round three webinar. So if you can bring up the first poll, John.

So this is a more general one. Closeout is the process by which the federal awarding agency determines that all administrative, financial actions, and required work of the award have been complete. True or false? And I'm going to wait for answers to come in. So I'll be silent for just a minute.

OK. Thank you for that, and we had a lot of good answers here. So – what – 87 percent said true. Is that correct, Meron?

MERON ASSEFA: Yes. That's correct.

MR. ESTRADA: Wonderful.

MR. ASSEFA: You want to elaborate more?

KEVIN BRUMBACK: No. That's correct.

MR. ESTRADA: OK. Great. We'll move on to the next one then. I think they get a little more specific. Recipients are required to submit the final ETA 9130 report – that's the financial report – within six months of the period of performance end date. True or false?

OK. So 88 percent – yeah – said false, Meron. Is that correct?

MR. ASSEFA: That is correct. So the final 9130 is due 45 days after the period of performance end date, which is, in this case, November 14, 2018.

MR. ESTRADA: Excellent. OK. Thank you. Next question. Grant closeout documents are due no later than 90 calendar days after the grant's expiration. Is that true or false?

OK. It looks like we've got about – yeah – 70 percent are answering true. Kevin, is that correct?

MR. BRUMBACK: That is correct. And just to follow up on Meron's last answer, the final quarterly report is due 45 days after the end of the period of performance. The final final, we call it, is due 90 days after the period of performance end date, and that – those dates are specified in this presentation at the very beginning but it's also in the closeout presentation.

MR. ESTRADA: OK. Next poll question here. During the closeout phase, recipients are allowed to take on new obligations. Is that correct or not correct? True or false?

All right. We'll go with – we're getting about 88 percent are saying false. Kevin, is that correct?

MR. BRUMBACK: That's correct, and Cheryl has been great about shepherding folks through the process. You've already – you guys will be way ahead of this deadline because you will have most of your obligations liquidated by March and you'll just be cleaning out the award mostly around evaluation cost and expenditures probably. So by the time you get all the way to September, you guys will be long not incurring new obligations.

MR. ESTRADA: Excellent. So before we bring the next polling question, which is the last polling question, I just want to emphasize that the rest of the time is devoted to your guys' questions. So if you have any questions that you have specifically regarding the closeout, financial process for Meron or Kevin, now is the best time to start bringing those in, and we'll try to get those addressed. There's no more – there really won't be any more slides to address. Really just Q&A session. So, John, can you bring up that last question?

If equipment costing more than $5,000 was purchased with grant funds, what document must also be submitted with the property certification form? Not a true, false this time. It's either option A, no other documents, B, an inventory list, C, a current price list, and I definitely do not know the answer to this question.

MR. BRUMBACK: Well, the respondents, the grantees did a good job. They've been well taught by Cheryl's staff and by the FPO. The answer is that it's an inventory list. And just to clarify, at grant closeout we are concerned about those items with a $5,000 cost or useful life over one year, I believe, at the time of closeout. So keep in mind you've been buying equipment for your prime and your subs throughout the entire grant award. Closeout Office is mostly – is only concerned about those items of equipment at the time of closeout that are worth $5,000 or more. So that $5,001 piece of equipment you bought at the beginning of the grant probably is depreciated below $5,000.

MR. ESTRADA: OK. Excellent. Thank you. Well, thanks for handling those questions. I'm going to hand it back over to you, Cheryl. Looks like we've got some questions coming in.

MS. MARTIN: OK. So the first question is actually a continuation of the reporting question before, and it says, "What about the proposed reporting extension for round four that was recently posted in the Federal Register requesting comments?"

Ding, ding, ding. You get a prize for reading the Federal Register. What happened there is that all of – all that did was extend the – you know you have to have one of those valid OMB numbers on any time we ask you for data, and so the – that expired for the APR and the QNPR as of – I don't know – July 30 or something 2018. It was a dumb time, but that's just how those things work. You get them for three years from whenever they start, and so we had no control over when that started.

So we had to put it in there again an go through that whole fun process so that we could ask you to report on the exact same things this year that you've always reported on before and so that we can get a new little number or date or something on our APR and QNPR forms that you fill out. So there's really no difference there. It's just we just had to jump through that bureaucratic hoop to get the OMB number on the – on that, and it won't change anything about what you report or the timing or anything. It might look open-ended.

That just means it's available to use until it's due or until you need it. So if you turn it in by November 14 and you want to go back and update your numbers on January because you got the wonderful magic UI report finally, that's okay, and we can still collect it from you because we have the right number. That's all.

OK. Question for Kevin. Actually, before I go to that one, let me ask this one about, "Can we pay for accreditation expenses after April 1?"

I'm going to say let's take that offline and put that through your FPO because that – that's one of those it depends. So please take that one and send it directly to your FPO and us, and we'll help you figure that out.

So Kevin, there is a question, "Is it allowable to make our final payment to our third-party evaluator after September 30, 2018 due to the invoicing schedule?"

MR. BRUMBACK: Good question. So I would assume that you already have a contract in place at that point with your evaluator. So you would have created an obligation that would have been created during the grant period. So at that point you're just liquidating your existing obligation with the evaluator. So yes. You would have 90 days after September 30, 2018 to pay that invoice.

MS. MARTIN: OK. I'm seeing some questions come in. "Will any documentation be required for supplies purchased that have a unit cost below $5,000?"

MR. BRUMBACK: No. That's – no documentation is required. Items below $5,000 are considered supplies, and that should be in the supplies part of your award.

MS. MARTIN: Great. There we go. We got a question, Matthew, that says, "I defer that one to our finance staff. Is that a separate item on a performance report?" I'm not sure what the question is that you're asking there. So if you still have a question, Matthew, let us know, and we'll try to address it.

I see some other people typing. So we'll give it just a moment to see. Nancy Thompson, can unused vacation – oh, wow. "Can unused vacation leave for grant employees be paid out through grant funds?" Kevin, do you have an answer for that one now, or do you want to take that one – (inaudible) – on a more specific basis?

MR. BRUMBACK: Yeah. Let's take that one offline. I need a second to think about that one.

MS. MARTIN: OK. OK. So, Nancy, that particular question, if you want to send it to the – send it to your FPO and the TAACCCT mailbox and we'll get Kevin and Meron and whoever involved in it and we'll figure out an answer for you.

MR. BRUMBACK: Thank you, Cheryl.

MS. MARTIN: Go ahead. Oh, yeah. Matthew said, that was in reference – okay. So you got your question answered about the equipment report.

I see somebody else typing. This is your chance to get your questions answered, and they are fun questions, aren't they? Closeout is one of those times where you have to pay attention to things that are a little bit different than what you were looking at throughout. So it's great that we all are paying attention to this now and that you are in particular. You're going to want to go through and, I said, gather the information so that you have it all available ahead of time.

Somebody else – Kathleen said, "I'd like the answer to Nancy's question too." So if you want the answer to that question, please send that question to your FPO and the TAACCCT mailbox, and we will handle that individually for your grant. If anybody else has that same question, you can do the same thing.

OK. So we did have a couple of other slides here that were available for the – for this section of it that's just sort of to give a sense for what is grant closeout. We're not going to go through each of these, but it's the kind of thing that will be answered, if you didn't get a chance to look at the webinar for round three. You will be able to get a webinar response on that, plus of course there's the transcript. And let me just show you those really quickly here.

So okay. Good job on that test, by the way. So these are the kinds of questions that will get answered – were answered in the round three webinar. What is grant closeout? Key closeout items. Closeout is managed by a different office than our office. That's why we get our colleagues Meron and Kevin and they have all – a whole team of people that handle this.

You will be assigned a specific grant closeout specialist with a name, John Doe or Jane Doe or whatever, and you will be communicating directly with that person. As we said, that letter comes out typically in August, and the closeout period begins October 1 with your 9130 due 45 days after, along with your APR and your QNPR. And all the remaining closeout documentation that they will send you to fill out, that would be due no later than December 30, 2018 but always welcome sooner. So you can get it out of your hair too.

The End User Manual and FAQs that are specific to closeout can be found at that link that's there. We have a TAACCCT set of FAQs. So there's two different sets of FAQs. They're not in conflict, but one of them goes – is more specific to closeout. One of them has some of the closeout questions, plus a whole bunch of other questions. So give you a lot of FAQs. And yeah.

So we went through the questions, and I don't see anymore. I think, Scott and everybody else over there, do you have anything else? Oh, Kevin has a follow up to a previous question. So, Kevin, you have a follow up. Please go ahead.

MR. BRUMBACK: Yes. Thank you, Cheryl. So I think it was in response to a previous question. We kind of had part of the question, and I think we now have the full question and answer. So basically, the question was, okay. I have equipment. It's at time of closeout, and what do I need to submit. Your specialist, as Cheryl referenced – our specialist will send you basically a closeout equipment form.

It will have – it will require you to put some basic information about the item itself, and then you'll be requested to state what you intend to do with that piece. Do you intend to keep it for grant-related purposes? Do you intend to junk it, essentially? To sell or et cetera, et cetera? The form is very intuitive, very straightforward. So that will be part of your closeout documentation that you will be – you'll be receiving. I think that was part of the question we got earlier. I just wanted to make sure you knew that. Thank you. That's it, Cheryl.

MS. MARTIN: OK. Great. All right. Well, thank you. Thank you to each of you for joining us here today. I hope that this was helpful to you. Thank you to our presenters who are – were all here to answer your questions, and we look forward to being in touch with you throughout the entirety of this time period.

We're still here. We're still available to help. Let us know how we can do so. Thank you so much.

(END)