

SSA AUDIO ONLY ACCOUNT WIPA RECOMPETE

**Moderator: Carol Cohen
February 24, 2015
12:30 pm CT**

Operator: Good day, and welcome to the Social Security Administration WIPA Recompete teleconference. Today's conference is being recorded. At this time I'd like to turn the conference over to Miss Carol Cohen. Please go ahead.

Carol Cohen: Thank you very much, operator. And we here at Social Security headquarters in Baltimore in about 15 degrees today, very warm and sunny outside. We welcome everyone and we're absolutely delighted to be here. It's been a long time, and we're all very excited about the opportunity to speak with you today and share a great deal of information about the upcoming competition.

I'm delighted to introduce Robert Pfaff. Robert or Rob, as we call him here, is our Deputy Associate Commissioner for the Office of Research Demonstration and Employment Support; or as we refer to it, ORDES. And I will now turn it over to Rob.

Robert Pfaff: Thank you, Carol. Hello, everyone, my name is Robert Pfaff as Carol indicated and I am the Deputy Associate Commissioner in the office of Research Demonstration and Employment Support. Welcome to our teleconference for the Work Incentives Planning and Assistance, or

what we call the WIPA program, Request for Application. As you may know this is the first open competition for this program since 2006.

We're particularly excited about this opportunity and welcome all eligible applicants. We are seeking awardees to serve our beneficiaries through July 2020 pending the availability of funds. The WIPA program has evolved over the years. The earlier iteration, the Benefits Planning Assistance and Outreach, or BPAO, started out as primarily providing information and referral. The subsequent and current WIPA program has focused on serving more beneficiaries who are job ready.

The current Request for Application, RFA, describes a program more focused on providing intensive services to beneficiaries seeking to enter or reenter the workforce. We have also changed our certification program to ensure that our community work incentives coordinators or CWICs receive intensive ongoing training and support to maintain their skills at the highest possible level. There will also be minimum time commitments associated with the program.

You will hear about - you will hear more about these and other changes from the ORDES staff and the office of acquisitions and grants. Our staffs have been working nonstop to bring you a seamless customer-friendly application process, and we do welcome your feedback. We look forward to reviewing all applications received by 5pm Eastern Time on March 30, 2015. Thank you for your interest in serving our beneficiaries, and I will now ask my staff to get on with what you all came for.

Carol Cohen: Very well done. We will have an opportunity for your questions today, so as we present the material to you, it might be a good idea as you think of questions to jot them down so you're sure to not miss out on the opportunity later in the call. Let me take a moment and tell you what we're going to talk to you about today, and thanks again, Rob.

Robert Pfaff: Thanks, Carol.

Carol Cohen: Thank you so much. We're going to have our partners here at headquarters, the Office of Acquisitions and Grants, OAG, and I know many of you work very closely with them, they're going to talk to you about some tips and hints and reminders about submitting your applications. Then I and my staff are going to talk to you about programmatic aspects and changes and information that'll be very important to you as you prepare your applications.

And then we are going to open it up and we're going to have an opportunity for you to ask your questions. Just a few things I'd like to share with you that you may have already read about, but just to remind you, please be sure to read the entire RFA. Now that may sound like well, obviously, however you'll find that sometimes these things do drag on and they get a little bit boring and you may skip parts but don't do that.

We ask that you read the entire RFA. You'll find that many of your questions may be answered. You may find that as you read you say, oh, I was just going to ask that question. So lots of the information you're thinking about and lots of the information that you're concerned about is - may very well be right in the RFA, so be sure to read that in its entirety. There is very clear directive in the RFA about where to submit questions.

Many of you who are existing WIPAs are calling your project officers, and that's fine. However we do ask that you submit your questions to - and it's in the RFA, but I'll read it all right? SSA-TA@grant - not plural, just grantreview.org (SSA-TA@grantreview.org). Every single question that is received at this address is mulled over, is conferenced over, is considered very important and we respond to all of them.

And we will be posting updated - sorry, we will be posted updated FAQs or frequently asked questions to the Website weekly, so visit that Website and that is that long Website. I'm not going

to go - I'll just tell you it starts with SSA.gov/OAG/grants, but there's more to it. You can get to it by SSA/OAG/grants, but then you need to search for the WIPA. Please be sure to visit that Website regularly because all of the important information is posted to that Website, the RFA itself, frequently asked questions, the agenda and the power point slides from - for today's presentation and everything else you might need.

Just to let you know, we will be repeating this call on March 12th at 1:30pm Eastern Time and it will be the exact same presentation. That's why we're recording. However, we will also have an open FAQ forum on the March 12 call as well, and once again all questions that are new questions will be added to the FAQ, so be sure to visit that Website regularly. It's my pleasure at this point to introduce Tonya Saunders. She is a branch management officer with the Office of Acquisitions and Grants. Tonya?

Tonya Saunders: Thank you, Carol. Good afternoon, everyone. Before I get started I would like to introduce the other members of the grants management team, and they are Dionne Mitchell, Audrey Adams, and Chris Brennan. We are all here today and we will be at the end of the session to answer any questions you may have. Our purpose today is just to highlight a few items from the RF2, things for you to be mindful of while completing your application.

The first, most important thing we need you to remember is that all applications are due March 30 and they must be submitted through grants.gov. I would recommend that you submit your applications sooner rather than later just in case there is a system issues that prevent you from logging in or getting your application submitted on the 30th. Any questions you may have pertaining to the applications are due March 23.

And again, like Carol said, they will be answered by the program office and the grant office and they will be posted on our site. We ask that you submit a risk assessment with your application and check and double check the award amounts. You will find those in appendix A and those are

also listed on our Website. Please check the state maps for the service areas and include this information in your application under program narrative so we'll be able to see that.

All applicants must register their DUNS at the system for award management which is also called sam.gov. The registration takes about a few days to a week so please make this a priority when you do your application. The individual completing the application in grants.gov must be the registered authorized organization representative, which is also the AOR. This is the individual authorized to submit applications on behalf of the organization.

So whoever is the AOR of your organization must be the one completing the application and their name must be stated. When you get to the budget narrative section of the application, we ask that you refer to the new 2CFR Part 200 uniform guidance course principles. This guidance will provide you with what is related course items that are acceptable to include in your submission, and we have provided that link to the regulations on the slide.

So if you're able to get to the power point you'll be able to pull that up, or you could do a Google search for the uniform guidance principles. To conclude, there's also - you also need to include a copy of your approved indirect course rate agreement if these charges are applicable. You can find more details about indirect course rate. I think it's on page 27 of your RFA, so if you read through and you need more information that's where you'll be able to find that at.

If you have technical assistance you need, you can contact grants.gov and their Website is support at grants.gov, or you could call them at 800-518-4726. That's all I have, but to close if - I would like to ask the grants management team if there's anything they would like to add. They could do so at this time. Dionne, Audrey, or Chris?

Dionne Mitchell: I would like to add that we also have help from ((inaudible)) and at times Brenda Monch.

Tonya Saunders: Okay, Chris, Audrey, anything?

Chris Brennan: I don't have anything to add.

Audrey Adams: I don't either at this time.

Tonya Saunders: Okay. So that's it for me. This is the end of the grants portion of the presentation.

Thank you for your time. Back to you, Carol.

Carol Cohen: Okay. Tonya, thank you so much. Thanks, everybody, and I'll just tell you that we don't operate here without our partners in OAG. We're kind of connected at the hip, so this was a real - it takes a village. It really did, and it does, and so we continue to work together closely every day to bring you this wonderful opportunity that we haven't had in so many years.

So I'd like to kick off the programmatic portion of our program, sounds like a new television show, the programmatic portion of our program, and talk a little bit about the new RFA, which is a little bit different, and I'm sure many of you have noticed that our descriptions and our focus is just slightly different, so let's talk about that. I'd like to start by talking about the target population.

As many of you are aware WIPA projects serve beneficiary, 14 years old and older, beneficiaries that receive Social Security benefits based on their own disabilities and wish to enter or reenter the work force. Our services in the new RFA will focus on beneficiaries who are working including those who are self-employed or are about to begin a new employment situation or begin self-employment or they have a job offer pending or their business is about to start up, or last grouping, who based on informed analysis and discussion with a CWIC are very serious about working and ready to work.

So as you can see we've shifted slightly in that we're focusing on more work ready individuals and individuals who are either working already, about to work, or who are very serious about seeking a job or returning to the work force. That's a slight shift in our service model from prior years. We also will talk to you shortly about the minimum time commitments for CWICs. CWICs are the community work incentive coordinators, and these are the individuals who are housed at the individual WIPAs, and they provide the direct service to our beneficiaries, provide the support and the long-term assistance.

What we mean by this is that over the years we have not had requirements in terms of how much time an individual CWIC should dedicate to the role, and because it's a very demanding role, we have kind of shifted our position on that and we're going to talk to you about minimum time commitments for CWIC work. We also for the first time since the inception of this program will require continuing education credits.

We have not done that before and actually many individuals who work in the system have asked for that, so as you can see our interest here is keeping the providers up to speed on current information so that they can offer the very best in exemplary services to our beneficiaries. We will continue to work very, very closely with the national help line and we're going to talk to you a little bit more about that and what that is, but as many of you were - are aware we have a help line that provides direct service and information to any beneficiaries that call in.

We also are going to continue to require adherence to the benchmarks and we're going to talk a little bit more about that, and if you read the entire RFA and you also looked at the appendices, the benchmarks are attached. These are those kind of standards we use to help you to meet or achieve what we consider based on prior data to be service standards. We're going to talk to you about what we're referring to as summary writing software.

This is some software that will help you to prepare more uniform reports and so that we have a consistency nationally in terms of the quality of the reports we provide to our beneficiaries. We're also going to talk to you about some changes in the firewall requirements. We're going to describe some changes in outreach and you'll notice that the earlier iteration of this program called the BPAO, the benefits planning assistance and outreach, well, that's changed, so we're going to talk to you about that piece, that particular piece, the outreach piece.

I know that many of you if not all of you have noticed that the funding distribution and the proposed service areas have changed. We're also going to talk to you about that and describe to you why the changes were made and what changes were made, but again I refer you to the RFA and to the associated appendix, which is very descriptive, lists all of the states, lists the service areas within the states.

It also includes maps, so all of that information is there for you but it may be a little bit confusing and that's why we're here today to try to clarify for you some of that information. So we expect projects to provide more targeted, more comprehensive and intensive services with a larger percentage of those services offered to beneficiaries by way of distance-based and remote delivery.

So if we want you to see more individuals yet we want targeted intense services, we have to all agree that it's a better use of resources to use more remote and distance-based approaches. We certainly encourage consortiums and partnerships and we hope that you are communicating with other entities in your communities, in your states to find ways to work together and serve our beneficiaries in the most efficient and effective way possible.

With that I am delighted to share the podium with three incredibly capable, confident project officers and so they're going to describe to you some of the references that I just made in terms

of some of the changes and some of the language contained in the RFA, so let me turn it over at this point to Margery McIver. Margery, take it away.

(Margery McIver): Thank you, Carol. Good afternoon, everybody. I'd like to touch on minimum time commitments. In this iteration of the WIPA program, community work incentive coordinators must commit at least 40% of their total work effort to direct benefits counseling services to beneficiaries, whether Social Security or another source funds the services. Our goal is to maintain competency.

The job of the CWIC is complex and highly technical and we believe it is a skill set that is perishable and one that is enhanced with practice. Cooperative agreement also requires that WIPA project directors commit at least 25% of their total work effort to the WIPA project. We recognize that many applicants are housed in agencies that administer multiple programs so just to clarify this requirement does not mean that the CEO of your organization must meet the 25% standard.

We're looking for a commitment from program directors, those responsible for overseeing and managing the WIPA project within the organization. CWIC continuing education, CWICs are required to complete the process for certification by attending the initial CWIC training course, pass all assessments, and receive satisfactory scores on three benefit summaries.

After earning full certification CWICs now must earn 18 continuing education credits annually in order to retain their certification. This new requirement will help ensure that CWICs maintain their level of competency. Helpline, the helpline is a national toll-free call center for beneficiaries seeking return to work related information, support, and services. We strongly encourage WIPAs to direct or push beneficiaries that appear to be earlier in the employment decision process to the helpline.

The help line staff is fully trained and capable of providing information and referral and basic work incentive guidance to our beneficiaries. Using the help line will free up WIPA projects to provide more intensive services to our beneficiaries. Now I'm going to pass you to (Djuna Mitchell), another project officer here in ORDES.

(Djuna Mitchell): Thank you, Margery. I'm going to start with benchmarks. Each WIPA awardee must make every effort to meet or exceed the performance benchmarks that we will provide. We may modify the benchmarks and will provide information, guidance, and training on the benchmarks throughout the life of the award. Projects are - will now be required to meet or exceed the benchmarks, unlike prior iterations.

Summary writing software, WIPA projects are now required to use a Social Security furnished benefits summary preparation software in addition to the Social Security furnished Web soft. We will provide guidance on how to gather the state-specific information required to customize the software, as well as training on how to use the software through the training and technical assistance provider for the local programs.

This requirement will be phased in following the selection of the training and technical assistance provider. Firewall requirements, organizations may continue to operate the WIPA and an employment network. Protection and Advocacy agencies may continue to operate a Protection and Advocacy agency and a WIPA. We continue to require a firewall between the employment network and the WIPA, and the WIPA and the P&A.

Unlike prior iterations of the WIPA, we will not consider any exceptions to the firewall requirement between a WIPA and an employment network for direct staff and supervisory staff. The WIPA must qualify as a standalone and autonomous program. They may not share direct staff or supervisory staff. Because of the CWIC's potential to influence a beneficiary's choices and the

employment network's potential to financially benefit from those choices, it is imperative that we avoid any appearance or occurrence of undue influence.

Therefore, the WIPA and the employment network must be completely separate from one another. We must make sure that our beneficiaries receive unbiased guidance in their journey toward financial independence and employment goals. And now I'm going to pass it to (Terri Uttermohlen).

(Terri Uttermohlen): Hi, everybody. ((inaudible)), okay, we're just going to talk a little bit about outreach.

As you can see from this slide, we're - the limits for outreach for the first year at 15% of your work effort, and then we drop it to 10% and that's because we're going to have new projects and we're going to have new service areas. I want to give you the opportunity to build an understanding in the community of what you provide and where.

But it's important that you not spend a lot of time on outreach because there - WIPA is well-established and we want you guys to be providing direct services, any of you who are successful in your applications. And we want WIPAs to target specific populations for this outreach such as transition aged youth, disabled veterans, and under-served populations, people who normally aren't going to walk through your door because they may not know about you or they're particularly vulnerable.

Another change to the outreach is that we're going to ask that you use the help line toll-free number on your outreach materials and Website as the first line of contact for beneficiaries. We want to save WIPA staff time from answering the phone for people who aren't ready to go to work or who don't understand what the service is, so that you have the time to provide intensive benefits counseling to individuals who are indeed working or almost there.

Now we're going to talk about distribution. We've gotten a lot of questions about why we changed, how we changed, what were we thinking, and I understand that. I understand how we got there, but we had to change. We're required under the law to use population to distribute WIPA funding. We're also required under the law to limit any entity's award to \$300,000. We don't have a choice about that. That's the legislation.

So what we did was we took the most recent disability figures we could access readily, which was the Annual Statistical Report information that's on our Website, and in the first frequently asked questions that was already posted to the Website, there are links to the numbers that we used. We used the population of SSDI workers, so that's workers who have paid into the Social Security system and become disabled, and the number of SSI beneficiaries who are receiving SSI because they have a disability or blindness.

And we added those figures together. They were as close as we could get to what the WIPA service population should look like with readily available data. We added those together, figured out how much it was for the nation and then we figured a percentage by state. When the percentage by state was over the maximum we would allow for an individual grant, we divided it and we tried to divide it as evenly as possible.

We tried to divide major metropolitan areas so that they were across more than one project. Finally one of the questions that we've gotten a lot is hey, there's no map for my program. If there's not a map it's because you were asking the project to be statewide, so look in the appendix. Appendix A lists every state and every state area if you're concerned just because you don't see a map. Look there and you'll be able to figure out what we're asking as a proposed service area. I'm going to pass this back to Carol.

Carol Cohen: Thank you so much, Djuna, Margery, Terri, thank you so much. We have a room filled here with headquarters staff. Does anybody before we open it up for questions, anyone have any

comments or anything they'd like to add, to either the OAG portion or the program portion? Not yet, huh? Okay. Great job, everybody. So at this point we just kind of gave you the tip of the iceberg here and hit on some of the high points, hit on some of the highlights. So we'd like to at this point open it up to you out there, and I think there's how many out there, Stephanie, 100 and...

Operator: About 200.

Carol Cohen: Wow, fantastic. So we'd like to open this up to all 200 of you. I don't know that we'll get through 200 questions, but maybe not. Maybe we won't need to. Again, be sure - I know I'm going to sound like a broken record, but be sure to read the entire RFA. Many of your questions will be answered. Visit the Website frequently for updates to the FAQ. So with that, let's open it up for questions, Stephanie. Thank you.

Operator: If you would like to ask a question, please signal by pressing star one on your telephone keypad. If you're using a speakerphone, please make sure your mute function is turned off to allow your signal to reach our equipment. A voice prompt on your phone line will indicate when your line is open. Please state your name before posing your question. Again, it is star one at this time. And we go to our first question.

(Don Pirozzoli): Don Pirozzoli.

Carol Cohen: Hi, (John).

(Don Pirozzoli): Hello, how are you?

Carol Cohen: Just reminding everybody, this is being recorded.

(Don Pirozzoli): Okay. I have several questions for the - you know, so that everybody has a chance I'll just ask one that is fairly important I guess to me. How are changes in the program outreach, etcetera, how much time we're going to spend providing information, referrals, how is that going to be communicated to local SSA offices, VR offices, and other agencies that can provide referrals, because that seems to be in our experience over the last two years, a pretty big issue in terms of those different offices really knowing about the program, how it works, and what information to provide and what format to provide that in, and timeframes that that information is provided to us.

Carol Cohen: Don, everyone this is Carol Cohen. I didn't even properly introduce myself, did I? But I think you know me, Carol Cohen and I'm the branch chief for the branch that is responsible for the WIPA program. I'm going to take that one, and that is an excellent question. And we have some procedures and processes internally that we use to advise the field about the program, new grantees, changes to the program.

And I assure you that this will be an ongoing process where we will provide information, updates, and to some extent for lack of a better term, training to field offices, AWICs, everyone that we need to, to inform them of the changes in the program, and of course we will advise them as to the new cadre of grantees, but we have a number of approaches we use. We use something called an administrative message.

We will be using that I can assure you, and other ways. We also meet regularly with ticket coordinators via teleconference, so we'll be using all of these ways, but I'll just say it will be a process over time. This isn't going to happen overnight as you know. We still have folks out there who were perhaps not 100% clear what the WIPAs do, so we're going to be using everything available to us to educate. And I think (Terri) has a comment.

(Terri): Don, I think part of your question was also how agencies within your state that refer to you will know about changes in information and referral and how you provide services, and in that, that's your job. If you get a grant, one of the things that you need to do is contact the people, the agencies that you will work with in your area and let them know what you do, what the changes are so that that's part of your outreach and that's one of the reasons that we give you a little extra time on outreach the first year.

(Don Pirozzoli): Am I still on?

Carol Cohen: You are.

(Don Pirozzoli): Oh, can I do a follow-up or is this taking up...

Carol Cohen: Go ahead, take - you can take another ten seconds, yes.

(Don Pirozzoli): Okay, okay, my follow-up is A, we've done a lot of communication, B, we still don't get BDQIs or we don't get them in any kind of a timely fashion, which affects our ability to meet some of the benchmarks and also if we're only going to be able to spend 15% of our time doing outreach, a lot of the regions including the region that we're in, the outreach time, 15%, I'm not sure that that's realistic given the amount of travel time, etcetera, involved in doing outreach.

For example, if we go to one - if we go to Fort Lauderdale which is in our service area to do an outreach, that's an 8-hour event, just for one day and it's usually a day and a half or two days which puts us really over - will put us over the 15% time for outreach.

Carol Cohen: Okay, Don, I really appreciate your comments. They're really good. We're taking them down and I promise you that we will provide technical assistance and support on all of the issues you've raised and we're going to help you, we're going to provide guidance on how to do this. It's

15% of your total work effort, so it's a little bit different, and we're going to talk about - not today, but at a later point after August 1st we're going to talk about creative, innovative ways to do outreach that don't involve 8 hours of travel. So bear with us on that.

(Don Pirozzoli): Okay. Thank you very much.

Carol Cohen: You're very welcome and thank you.

Operator: And we move to our next question.

(David Gallegos): Hi, this is David Gallegos from Louisiana. I have two quick questions, one, can you clarify on the RFT page 9, it talks about 85% and 15% regarding direct service efforts. How does that differ from the 40% that was just mentioned earlier?

Carol Cohen: Okay, did you want to take it, Terri? Okay. Go ahead.

(Terri): David, the 40% is a minimum effort per CWIC. We're trying to say, hey, this is a really complicated job. We want people to take time to really be invested in what they're doing and to use at least 40% of an individual staff person's time to provide direct benefits counseling. For the WIPA project we want 85% of the work to be intensive benefits counseling and 15 - no more than 15% to be information and referral.

That's one of the reasons that we're suggesting that you refer people to the help line, to handle some of that information and referral traffic before it even gets to the WIPA project. Well done. And I would just say one of the - the impetus for this change in terms of the 40%, we have currently, we have many projects where we have individuals dedicating a very small amount of time, 5%, 10%, and this is such a demanding type of position.

And you know, we always use the terminology use it or lose it, we need folks to be committing a significant portion of their time to providing these kinds of services on a day in, day out basis so they don't lose the skills, so that was the impetus for the almost half time position. We had too many situations where you have seven, eight, nine CWICs, each one 5 or 10%, and this was becoming a challenge, so we thought we would kind of change up a little bit. And this is based in - to some extent on feedback from the field also.

(David Gallegos): Yes. Good. Very good. One quick question, if we have carryover from the current project, how will that be affected? Will there be an ability to carry over if we're refunded?

Carol Cohen: I'm going to turn to OAG for that. So let's turn to OAG.

Chris Brennan: This is Chris Brennan. I was going to have - Audrey, did you want to comment on that?

Audrey Adams: I can. I can tell you that in previous situations we have allowed if an applicant has been awarded through a recompile, they were permitted to carry their funds into the new grant.

(David Gallegos): So can I - are you answering that that's a possibility, or is that a yes?

Audrey Adams: Well I would be most comfortable saying it's a possibility, but I don't recall seeing anything that says we can't do that. It - I would guess that you would be limited by the same restrictions on the 10% for pre-existing services which is what limits the carryover now.

(David Diagus): To the 10%, Okay. Thank you.

Audrey Adams: For pre-existing clients.

(David Diagus): Okay. Thank you.

Chris Brennan: Also I'd like to bring up the point that if you don't win the new recompile there is no carryover then for the new grant.

Audrey Adams: That would be correct. They would be going through - they would be going through a close-out process.

(David Gallegos): Okay.

(Crosstalk)

Audrey Adams: The biggest award that - whichever category an existing WIPA finds themselves in, whether you are fortunate enough to be awarded again or you're going to close out, you will have the talents of the staff in OAG to help you.

(David Gallegos): Right, thank you for answering.

Carol Cohen: Sure, David.

Operator: And we move to our next question.

Jolene Wyler: Hello, this is Jolene Wyler from Utah, and I had a question regarding the 5% state match. First of all I wanted to know what the maximum match is, and then how is the 25% director time commitment to be written into that match?

Chris Brennan: Hi, this is Chris Brennan. I'm just wondering if Dionne, could you answer that question.

Dionne Mitchell: Hello. I'm still thinking about the last question. Okay, I'm sorry. You wanted to ask about your 25% cash that you're allowed to move?

Jolene Wyler: No, my question was because the director is required to dedicate 25% of their time, is that funding to be included in the 5% match? And then also what is the maximum match? We knew the 5% is the minimum, but what's the max?

Dionne Mitchell: We don't dictate the max. You may use salary from your director. You may use whatever you feel is necessary to meet your match. We don't tell you where it has to come from, so yes, you can use part of the director's salary.

Jolene Wyler: Is that 25% of the director's time supposed to be matched then as well? I'm getting that question from the - my fiscal people because the requirement of the grant to do 25% of the director's time, they're saying that it seems to be something that should be included in the match.

Female: Could be.

Chris Brennan: It could be.

Dionne Mitchell: Yes, it depends on how much - okay, excuse me. If the director's - it depends on the person's salary, number one, and grantees are allowed to use whatever combination of expenses to meet their match. You just have to document what you're using, so we don't tell you to use the director or use whatever. Whatever is doing best for your organization.

Jolene Wyler: Okay. So can the director's salary come from federal funds, or must it come from non-federal funds? That's the 25% of time.

Dionne Mitchell: That may come from federal funds.

Jolene Wyler: Okay. Thank you very much. I appreciate it.

Dionne Mitchell: Not a problem.

Operator: And we'll go to our next question.

(Deb Kopak): Hi, this is Deb Kopak calling from the school first group in northern Virginia, and I think you might have touched on it right before you opened up to questions. We - Virginia has been divided into two service areas, more or less the top two third of the state and then the bottom one third. Now we also serve as an employment network and I - we're very, very cognizant of the very strict firewall requirements.

But we serve the southern Maryland, the District of Columbia, as well as the entire commonwealth of Virginia. What we're wondering is, is it discouraged to propose serving an area that does not meet the area one section in Virginia? But what we're proposing to do instead is to serve the predominant northern Virginia area and more or less expand up to Baltimore and out to Frederick, Maryland, including the District of Columbia.

So basically now one thing you'd mentioned is that you had specifically designated major metropolitan areas to specific service areas. Is that going to upset that apple cart or is that something because we'd be targeting a very population dense area, that that would be encouraged or discouraged?

Carol Cohen: Okay, you made three really - this is Carol. You made three really good points. I'm sure the team here will have a few more comments. First of all, what we've given you in appendix A is proposed. This is how we're proposing to divide up the country so that we have full nationwide coverage based on very recent population analyses.

However, as we also said, if you wish to propose a different service area as a project without exceeding the maximum which is \$300,000, you cannot go one penny over \$300,000. We didn't create that. That's in the statutory language, the originating law.

(Deb Kopak): I completely get that. I - we manage a lot of federal funds when right down to the penny.

Carol Cohen: Yes, so you can propose anything you like. We gave you our ideas. You can propose what you like. Please justify it and demonstrate in your justification how it's in the best interest of the beneficiaries and that it's in Social Security's best interest, so basically you need to provide narrative that justifies why you're proposing a different service area.

(Deb Kopak): Okay. So when I am looking at the RFT on page 22 and it says specifically in the second paragraph applicants may include additional areas, we can also propose a reduced area. I just wanted to clarify that.

Carol Cohen: Yes, that's correct. That's a good point. That's correct. That's correct.

(Deb Kopak): Okay, okay. That's terrific.

Carol Cohen: Yes, your comment about major metropolitan is when we spent a lot of time doing these analyses, using the current population data, we made every effort to distribute major metropolitan areas so that certain grantees would not have a situation where they were serving multiple major metropolitan areas, so an attempt was made to just level the playing field so to speak, but that doesn't mean you couldn't propose something different.

(Deb Kopak): Correct. Okay. That has answered my question. Thank you very much.

Carol Cohen: You're very welcome.

Operator: And we move to our next question.

(Harriet Van Whitman): Hi, I'm calling - this is Harriet Van Whitman from Delaware. I've been looking at the RFA and I have been looking at on page 28, there's a - the different - in section part 3 and the project narrative and it lists different parts of the project narrative and how many pages they're to be. And I understand that completely, but then on page 34 there are criteria and it lists the way the points are distributed.

And I'm curious as to - and those areas, the different areas and the projects here, the background experience and the technical and organizational, they don't line up exactly with the sections in the project narrative, and I'm wondering if you could enlighten me if there's a specific thing you're looking at as a way to make sure that we go point by point and get all the you know, address all the things that need to be addressed.

Carol Cohen: Okay, I'm trying to better understand your question. The technical review information, and the criteria, that should be used as sort of a - your barometer if you will for preparing your application to make sure that your narrative describes all of the points and all of the criteria that are included in the - five, fifth - technical, yes - in the five sections, right, right. And the points are distributed based on our sense of importance.

So you would have 30 points for background experience, expertise, prior success providing benefits counseling, while if you move to section five, you see there's - you only have 15 points there for your budget narrative, so it's based on relative level of significance in terms of managing a project of this type. Does anybody else want to make any - anyone have any - I'm not sure if I'm answering your question, honestly.

(Harriet Van Whitman): When you're looking for those particular points in the criteria, is there some expectation that you can easily identify each one of those bullet points starting on page 34? Is there going to be some way that we should make sure that you can see how we've identified it, or will you need to be going through all of the applications and checking them off as you go? I'm just trying to figure out how that you're going to be using the criteria.

Carol Cohen: The criteria, yes, you - there's - the people will be reviewing them against those criteria, but that information is to be embedded in your application. It's not, you know, a bullet that you're going to address individually, one, two, three, four. You're going to answer those questions throughout your application so that the reviewer can identify it. Am I answering your question?

(Harriet Van Whitman): Yes.

Carol Cohen: Okay. Okay. Great. That was Cheryl by the way from OAG.

(Crosstalk)

Carol Cohen: It's a - writing these types of proposals is almost an art. It's a bit of a science and a bit of an art. You make every effort to include and embed as Cheryl said in your narrative all of the points in the evaluation criteria because those are the points that are going to be used by reviewers to assess the quality of your application. Okay?

(Harriet Van Whitman): I guess. Another less quick question, it does - it indicates here the number of pages and that's to be single-spaced or double-spaced?

Carol Cohen: Want to talk it, Terri?

(Terri): Go ahead. You just wrote this.

Carol Cohen: It's up to you. We tell you the font and how many pages, but we do not specify the single space, double space, or the margin size.

(Harriet Van Whitman): All right. Thank you.

Carol Cohen: I would say just remember that human beings are going to be reading these things, so it might be helpful to give them a little bit of a break in terms of the - yes.

(Terri): But we do specify 12-point font.

Carol Cohen: Right, yes. And not to exceed 75 pages.

(Harriet Van Whitman): All right. Thank you.

Carol Cohen: You're welcome. We think that's helpful sometimes when we don't specify pages. We tend to have applicants submit hundreds of pages because they don't know. This gives you a framework. I guess we can - thank you. We can go to the next question.

Operator: And we'll move to the next question.

(David): Hello, this is David in Maryland. A couple questions if I may, about the continuing education credits. How are those going to be counted and will they be stuff we're going to be doing through VCU only or are we going to be able to count trainings we get from other sources?

Carol Cohen: That's an excellent question. Excellent question, yes and no. Go ahead, Margery.

(Margery McIver): Hi, this is Margery. Hi, David. Currently the contractor is VCU, but the contractor that handles the training portion of the program will also provide a system of accountability, so you can monitor your credits and also find out the value of each course offered, and your question about outside training programs, Terri, do you...

(Terri): A lot of that is yet to be determined as Margery and Carol just said, this is the current training and technical assistance provider is VCU and it may continue to be them but we're going to offer a competition for that contract that will begin before the new WIPA grants begin, and part of that contractual obligation will be to help us assess what the best way to do this is.

Carol Cohen: So a little bit of TBD, a little bit of to be determined, but we're going to provide you with sufficient guidance and information, but that's a great question. Yes, especially the - I didn't think about the other training, yes. Thank you for that question. What was the other one, David?

(David): Well, I've got two earlier questions - pardon me - on the 40% goal for direct services, and if I understand correctly, I just want to clarify, does that mean that each of the CWICs who are on the grant and we have subgrantees who are working with those, are all of them going to be essentially a .4 full time equivalent?

Carol Cohen: Yes.

(David): Okay.

(Crosstalk)

(Djuna Mitchell): Well, this is Djuna Mitchell, David. How are you?

(David): I'm doing fine, and you?

(Djuna Mitchell): I'm fine, thanks. To answer your question, we are requiring that CWICs spend the minimum of 40% of their time on the WIPA project. That 40% of their time, you know, you have to deal with the information referral and they may be direct service. We expect some of it to be administrative in terms of entering data into ETO or whatever data system we're using at that point.

We know that that 40% of time will be split into different categories as you go about the business of doing the CWIC, so it's not - we don't even necessarily expect 40% direct service. We expect 40% of the total time to be CWIC, and within that the 85% intensive services and the 10 to 15% outreach depending on which year of the project we're talking about.

Carol Cohen: Well done.

(David): Thank you.

Carol Cohen: Thank you.

Operator: And we move to our next question.

(Jen Kimble): Hi, this is Jen Kimble in Maine. How are you guys?

Carol Cohen: Doing good, Jen. We were just waiting to hear from you.

(Jen Kimble): I have two questions. One is actually direct result of the last one. So if we have a CWIC who is full time doing benefits counseling but is split with different funding streams, are you saying that a minimum of 40% has to be directly on WIPA funds?

Carol Cohen: Hang on one second, (Jen), okay?

(Jen Kimble): Yes.

Carol Cohen: Yes, Jen, great question, and something we discussed just great - a lot - we discussed it to a great extent here. Let's say you're in an agency where there's split funding, so you have a benefits counselor working some time on the WIPA and some time let's say for VR as an example. As long as that individual is spending at least 40% providing that type of service, a WIPA like or CWIC like type of service, it's all about keeping current and keeping on your toes in terms of the provision of service.

With what we're trying to avoid are these piecemeal situations where you have 7 CWICs, each one is 8%, you know? So yes you can do that. Let us know in your proposal that the individual in question is spending at least 40% providing that WIPA like service. Some of it may be for WIPA. Some of it may be for VR, so the answer is yes.

(Jen Kimble): Perfect, thank you. My second question is, and I may not have gone through the RFA with a fine tooth comb, so forgive me. But I didn't see a lot of information there around quality assurance and improvement, and I was just wondering about that.

Carol Cohen: That's a very good point also. I think our benchmarks are a piece of that quality assurance and improvement, and the monitoring and potential for site reviews, so this is an area that we're going to provide a lot more information, training and technical assistance to the new cadre of WIPAs.

(Jen Kimble): Okay. Thank you.

Carol Cohen: You're welcome.

Operator: And we move to our next question.

Male: Hi. I am certified by the VCU national training center as a CPWIC. Is that the same as the CWIC that you're describing in the Request for Applications?

Carol Cohen: Oh, in fact, did you - do you want to take it, Terri?

(Terri): Sure. So you were trained as a community partner.

Carol Cohen: That's what I think he said, yes.

Male: That's correct.

Carol Cohen: But you said, CP, oh yes, community partner, yes. It is the same training and certification. It - a lot is going to depend on whether that is actually the same. It's going to depend on how you've used it since training and how recent and those are all things that will depend - that will determine whether or not you would need to go through training again if you were with a successful applicant.

Male: Okay. Thank you.

Carol Cohen: I'm sorry, ((inaudible)) that's why that's - okay, next question.

Operator: And our next question.

(Debbie): Hi, this is Debbie from California, and I wanted to talk about the letters of support. Is there a maximum number of letters that you're looking for?

(Margery McIver): Hi, Debbie, this is Margery. No, there is no maximum. We would hope that you include any letters of support if you're partnering with other agencies or organizations. We would want to see that, but there is no minimum or maximum.

(Debbie): Okay. Great. And will reviewers be looking at the whole project or are you going to be dividing it up such as helpful in how we format our responses? So is each section going to go to a different reviewer or...

(Crosstalk)

Carol Cohen: You had the whole room go oh, no, no, no, no. You'll - there will be a group of expert external peer reviewers who will review the entire proposal.

(Debbie): Oh, great. Okay. Thanks.

Carol Cohen: That would be a challenge. Thank you.

(Debbie): Thank you.

Operator: And we move to our next question. It looks like that line is disconnected. We'll move to our next question.

(Alexis Henry): Hi, this is Alexis Henry calling. I have a couple of questions. I'm not calling, I've actually been on for the whole time. Can you just confirm that we only need to prepare a one-year budget and budget narrative? That's my first pretty straightforward question.

Carol Cohen: We're going to let OAG take this.

Chris Brennan: Hi, Tonya, I'm sorry. Yes, Tonya.

Tonya Saunders: Yes, Alexis, you only need a one-year budget. We don't - if it's money meant for the - next year they will have everyone submit another budget for that year, but only a one-year budget is - and narrative is required.

(Alexis Henry): Okay. Thank you, and then I have another perhaps more complicated question. We're really interested to see FSA's interest in the use of technology and remote, you know, conferencing and Skyping and FaceTime. I have a question about that. Currently the FSA issued laptops do not have cameras, so will FSA one, allow the purchase of you know, cameras that can be used in - you know, with the FSA laptops and will you allow the loading of software for operating that? So you know, we - you know, currently with the FSA laptops, we couldn't Skype even if we wanted to.

Carol Cohen: Right, right. And that's a great question. And the answer is...

(Terri): The current laptops, you're absolutely correct, do not include cameras.

Carol Cohen: Right, right.

Carol Cohen: We have not determined what the features would be for any new laptops that would be distributed, and I wish I had an answer for you this very moment, but I'm going to have to say that in terms of any add-ons or additional software or the ability to - let's say to interface a camera, we're going to have to provide you with information and guidance at a later point.

And they're very good - I'm not - this is not a way of diverting the question. There's really good reasons that we can't answer this now, because we can only relate to existing laptops and there

may be a change in circumstances, so we - I promise you we'll provide additional information to the successful applicants.

(Alexis Henry): Okay. So we can describe how we would use technology to you know, more - you know, to serve more beneficiaries and spend less time on the road, but you know, it will sort of be within the parameters of what we're able to do with the technology as allowed by SSA.

(Crosstalk)

(Djuna Mitchell): Alexis, this is Djuna.

(Alexis Henry): Hi, Djuna.

(Djuna Mitchell): I definitely look forward to reading that description and be sure to include as much detail as you feel is necessary within the parameters of the application to describe how you would use technology to serve our beneficiaries.

(Alexis Henry): Okay. Great. Thank you.

Carol Cohen: And thanks, and thanks for sounding excited about it.

(Alexis Henry): I think it's great, you know, pushing us to think creatively.

Carol Cohen: Good.

Operator: And we'll go to our next question.

(Grant Perrell): Hi, good afternoon, this is Grant Perrell from the Massachusetts rehabilitation commission. We just have a couple quick questions. One is about the risk assessment form. We're assuming when you mean by non-profit that's a 501C3, and that - does the whole risk assessment form only apply to your non-profit or just question one, and then the second question is in terms of the EN and the firewall, is the VR - would a VR agency be considered an EN in terms of the firewall even if we're not taking the ticket, we're just doing cost reimbursement?

(Chris Brennan): Could you repeat your first question about the risk assessment form?

(Grant Perrell): Sure, on the risk assessment form the question one implies that it's just for non-profits. Is it just for question one or for the whole risk assessment and I'm assuming we want to clarify the definition of a non-profit, probably would be a 501C3?

(Chris Brennan): Correct.

(Grant Perrell): Okay.

(Chris Brennan): ((inaudible)).

(Crosstalk)

(Grant Perrell): We still have to fill that. Okay. All right.

(Chris Brennan): Including question one?

(Grant Perrell): Including question one, if we're not a non-profit?

(Chris Brennan): Yes, hang on for one second.

(Grant Perrell): Sure, no problem.

(Chris Brennan): Yes, the risk assessment form applies to all potential applicants.

(Grant Perrell): Okay.

Carol Cohen: The answer - go ahead, Djuna.

(Djuna Mitchell): The answer to your second question is yes, we do consider a VR agency to be an employment network for this purpose, and there would still be a firewall requirement.

(Grant Perrell): Okay. All right. We'll have to address that. My ((inaudible)). Yes.

(Grant Perrell): Can we use - if our CWICs have iPhones, can we use Skype on those iPhones? Is there any prohibition against that?

Carol Cohen: I - we're going to get back to you on that. I don't believe there is a prohibition. I do not believe that there is, but we'll have to get back to you on that with confirmation. We'll develop an FAQ on that. It'll be posted on the Website sometime later this week.

(Grant Perrell): Thank you. That's it.

Carol Cohen: You're welcome.

(Grant Perrell): All right. Thank you.

Operator: And we'll move to our next question. Caller, your line is open. With no response - oops, are you on the line? There's no response. We'll move to the next question.

(Marsha): This is Marsha in Montana, and I was wondering, I'm kind of going back to the question about the actual grant writing, and I was wondering do the five sections of the narrative have any point value? The evaluation criteria have points, but we don't know exactly where - which section some of the criteria go in.

Carol Cohen: Okay, I understand what you're saying. What I would do is suggest that you - thank you. We have one phone here so we're passing it back and forth. I would suggest you go back and read the full narrative and also read the evaluation criteria and think about how you would fold in and embed all the information by which the reviewers will be assessing your application, how you would fold that in, into your narrative description. You kind of have to work with both.

(Marsha): Okay. Okay. And then I...

Carol Cohen: The sections described in the front in the narrative section do not have any value. The value is described for you in the five criteria.

(Marsha): Okay. So we can take the section two evaluation criteria and embed that in A and B. Would that be correct?

Carol Cohen: Well, you want to create your narrative, and you want to be sure that you've included the evaluation criteria in your narrative so that the reviewers can say oh yes, this applicant did discuss how they would use technology to reach a larger, broader audience. In other words you want to be sure to address all those points in your long narrative.

(Marsha): Okay, I guess we have done that. And then I had one other question. The budget narrative for 15 points, that is separate from our budget and budget narrative that accompanies the grant?

Carol Cohen: Okay, we're passing the phone.

(Chris Brennan): Correct, that's correct.

Operator: And we'll move to our next question.

(Jamie): Hi, this is Jamie in Virginia. How are you?

Carol Cohen: Hi.

(Jamie): I've got a quick question. You had mentioned the software for the benefits summary and analysis. Would that be something like hot box or is that something else?

(Crosstalk)

Carol Cohen: It could be hot box. It could be something else. We want to - we're going to leave that open for the new training and technical assistance contract.

(Jamie): Okay. Sweet. And then with the letters of support, are there any restrictions on agencies that can write letters of support? Like can it come from SSA field offices, VR agencies, or is there a restriction on any of those?

Carol Cohen: Go ahead, Margery.

(Margery McIver): No, it may not come from a Social Security office or employee.

(Jamie): Okay.

Carol Cohen: And you might not want to include your mom and dad, but your second cousins

((inaudible)) - we need a little levity here, yes. No family and no Social Security. Think of Social Security as kind of family, so you know, they can't write anything, but everything else is open to you, your community partners, folks - organizations and entities that have worked with you in the past, sure.

You know, I would just say from a very practical standpoint and having dealt with competitions for many years, you probably don't want to go overboard. You don't want to include 100 pages of letters of support. Honestly these reviewers are not going to be able to read them all. Think of it like that, yes. Think of it in practical terms.

You want to include letters that are key, that are important, that make your point, that underscore your capacity and capability to do the job. Seriously, I - please don't take this literally but five good ones go a great deal farther than 80 that you know, are just not that meaningful. So I would opt on the side of practicality and what's really meaningful to your statement of capacity. Quality versus quantity; right?

(Jamie): Okay.

(Crosstalk)

Carol Cohen: Yes, just a suggestion, right.

(Jamie): Okay. Thank you so much.

Carol Cohen: You're so welcome.

Operator: And we move to our next question.

(Gina): Oh, hi, this is Gina with center for ((inaudible)) in Salinas and I have a couple questions. One of them is we're thinking about going into a partnership and the question that we have is do you guys have a specific percentage that we should have for administrative fees or no?

Carol Cohen: Okay, was the question that you're going to partner...

(Gina): Yes.

Carol Cohen: So one of the entities would be the primary recipient, you'd be the bottom line signature and then you're going to have partners; right?

(Gina): Yes.

Carol Cohen: I'm looking at OAG.

(Chris Brennan): Are they going to be sub-recipients?

(Gina): We will have ((inaudible)) with them.

(Chris Brennan): I'm sorry, are they going to be sub-recipients or sub-contractors?

(Gina): Yes, subcontractors. Yes, we will be the lead agency and then we will subcontract with them.

(Chris Brennan): Okay. So then the applicant - you're applicants, your application, so again you just need to identify I guess the roles and responsibilities that are going to be done by the sub-contractors.

(Gina): Okay. So there is no specific percentage of administrative fees that we can charge to them.

(Chris Brennan): Repeat that question, please.

Female: Is there a percentage of administrative fees?

(Chris Brennan): Oh, are you talking about like indirect costs?

(Gina): Yes.

(Chris Brennan): Okay, well do you have an indirect cost rate agreement?

(Gina): We might have one. We haven't had one, but yes.

(Chris Brennan): Well and it would be - if you had an indirect cost rate agreement that would identify the percentage that would be applicable to sub-contractors.

(Gina): Okay. So we will set up that percentage; right?

(Chris Brennan): You would use a - yes, you would use a percentage that's identified in your indirect cost rate agreement for subcontractors.

(Gina): Okay. Thank you, and the second question is for - we have about two, three weeks, and then want you guys to know we're going to be that provider to provide that training, we will need to send the certification; right?

(Crosstalk)

Carol Cohen: So you already have three CWICs on staff, is that correct? So they would not need to go to training again if they are certified.

(Crosstalk)

(Gina): So it will be only the continuing education for ((inaudible)); right?

Carol Cohen: Exactly. If they were fully certified, they would just need to do the 18 hours of continuing education credits.

(Gina): Okay. That's great. Thank you.

Carol Cohen: You're welcome.

Operator: And we move to our next question. Changed their mind. Please check your mute function.

(Linda): Hello, can you hear me?

Carol Cohen: Yes.

(Terri): Yes.

(Linda): Okay, I'm sorry. My name is Linda. I'm calling from Louisiana and I have a question regarding our project narrative.

Carol Cohen: Okay.

(Linda): In regards to the page limitation, it states in the RFA that the page limitation is 75 pages. Is that for the project narrative?

Carol Cohen: Right.

(Linda): Can you tell me what is included, because I was looking at page 28, and it tells you what should be included in the project narrative and its page limitations for each section under part 3.

Carol Cohen: Right.

(Linda): So I guess I need to find out what is included in that 75-page limit of the project narrative.

Carol Cohen: Well, you would have all the information that would pertain to the five technical evaluation areas, you know, in your narrative, who you are, how you're going to do this job, what kind of staff you have, all of that information would be in there.

(Linda): Okay.

Carol Cohen: Your budget narrative.

(Linda): Okay.

Carol Cohen: And your letters of support.

(Linda): Okay.

Carol Cohen: What would not count is if you wanted to include like, if you're an existing project or if you're any type of other service entity, if you had for example brochures or those kinds of materials they would not count as part of the 75 pages.

(Linda): Okay. All right. Thank you very much.

Carol Cohen: Letters of support, yes. Letters of support, yes.

(Linda): Letters of support is included in that 75-page limit.

Carol Cohen: Yes, yes.

(Linda): Okay. All right. Thank you.

Operator: And we move to our next question.

(Crosstalk)

(Don): Hi, this is Don again from Winter Park, Florida. I have a question. When we were going through the power points and we were talking about the new model where the most amount of time should be spent on beneficiaries who are quote unquote serious about going to work or going back to work. How do you gauge a person's seriousness? Are there criteria or has that become kind of a subjective call?

Carol Cohen: Okay, I'm going to jump in and I'm going to ask you to hold for one second. I need to go back and I need to modify something I just said. Let me just read to you - I was incorrect. On the bottom of page 33, onto 34, it says attachments that support the project narrative count - hang on

a second, let me start at the beginning here. Applications should be as concise as possible.

Project narrative portion may not exceed 75 pages. Okay.

This does not include - it does not include - the 75 pages does not include resumes, funding appendices, and attachments that support the project narrative count towards the 75-page limit. Attachments not applicable to the project narrative and that includes letters of support, so your letters of support do not count towards the 75 page limit.

I just wanted to correct something I said. That's a little - that sentence is a little bit confusing, the way it's written. But resumes, letters of support, any documents you've attached relative to funding, they do not count towards the 75 pages. So the 75 pages are really the meat or the heart of your proposal. Okay. Thanks. Now go back to your question.

(Don): Oh, did you want me to repeat it?

Carol Cohen: Yes, please.

(Crosstalk)

(Don): I'm sorry. Most people don't want me to repeat things. The question is in the power points when you talked about the - well, the new model and the focus of the CWICs should be on people who are serious about work in some form or another, and I'm wondering how you or how we gauge the seriousness of that. Is that - are there criteria associated with that, or has that become kind of a subjective call that a CWIC would make?

Carol Cohen: Hang on one second.

Carol Cohen: Hi, we're ready for you.

(Don): Oh, don't tell me you want me to repeat it again.

Carol Cohen: No, no, no, no. No, no.

(Don): It's on slide 5.

(Djuna Mitchell): This is Djuna and we will provide more specific training on how to determine how serious someone is and whether or not they would qualify for WIPA services. We will provide that training, yes.

(Don): Awesome, thank you. Thank you, that's awesome.

Carol Cohen: Yes, we're going to help you with a lot of this, but you know, it's the way you communicate with the individual, the probing questions, very specific kinds of questions, checklist kinds of issues, you know, and we're going to help you with this. We're going to provide just an enormous amount of training and technical assistance.

(Don): Oh, I hope - I look forward to that, I hope that we are able to actually receive that.

Carol Cohen: Okay.

(Don): Which means I hope that we are awarded.

(Crosstalk)

Carol Cohen: Stay positive, stay positive, yes. Okay.

(Don): Yes.

Operator: And we'll move to our next question.

(Rebecca): Hi, this is Rebecca in Florida. I had a quick question about the budget. A previous caller asked if we have to provide more than one year of budget, and your answer was no, but I'm looking at the SS424 section E budget estimates for future funding periods, in years, and according to your grant instructions we have to provide columns B, C, D, and E, which would be first, second, third, and fourth year periods. Can you provide clarification on that?

Chris Brennan: Hi, this is Chris. Tonya, could you provide some clarification?

Tonya Saunders: Okay. Section - so section E, if - that section, if you get 300,000, you could put that you expect to get 300,000 for each additional year if it goes for five years, but it doesn't mean that it will, but for future funding just assume that if it does, then you would put 300,000 in each of those - for those years, but we do not guarantee funding until the government has their money and the award is issued, so for section E you can put whatever service area that you have, the amount that we plan on giving you for that year, you can put that in each one of those boxes.

(Rebecca): Okay. That helps a lot. Thank you so much.

Operator: And we'll move to our next question.

Male: Hello. May a single individual who is not a direct service provider manage both an EN program and the WIPA program?

Carol Cohen: Okay, you - are you speaking about for example like a high level administrative position where you're not...

Male: A supervisory or - that's correct.

Carol Cohen: Okay. An individual that's providing direct service and/or supervisory service may not operate on both, but if it's a high level CEO type of position or an administrative position for a parent or hosting agency where you have more than one program, then we will entertain a request from you.

Male: Okay. That's clear. Thank you.

Carol Cohen: You're welcome.

Operator: And we move to our next question.

Female: ((inaudible)). I understand that you can apply for a different proposed service area. However, if you're applying for one of the ones that is currently listed is the funding amount capped at what's listed on appendix A, or are we able to apply for a higher amount as long as it's under that 300,000 max?

(Terri): We set the funding levels based on the disability population in that area, so if you apply for the area that's listed in the appendix, we're going to provide the funding that we have listed.

Female: Okay. So we can't go any higher than that.

(Terri): You can ask, but we can't give it. We can't promise.

Female: Right, right. I would just modify that a tiny bit and say you can ask and provide justification, and why, and as long as you don't go over 300, you know? But as Terri said, we can't promise, but

you know, there's nothing off the table, put it that way. But the amount we assigned was done for a very specific reason. It's relative to and based on the population. But you know, if there's something you know that we don't, for example, and if you want to request the same area but a little bit higher, provide good justification.

Female: ((inaudible)).

Carol Cohen: Are you there? Hello?

Operator: Looks like the line might be cutting in and out.

Female: Okay.

Operator: With no further response we'll move to our next question.

(Emma): Hi, this is Emma. I have a budget question. So traditionally there have been some costs associated with our state specific training, so can continuing education be written into the budget?

(Chris Brennan): Hi, Dionne, if you want to answer the question.

Dionne Mitchell: Training is an allowable expense. You just have to make the case for it and provide justification.

(Emma): Thank you.

Operator: And we'll go to our next question.

(Richard Freidkin): Yes, is my line open?

(Crosstalk)

(Richard Freidkin): Yes, this is Richard Freidkin from Florida. Question, if you have an individual who's meeting the minimum 40% requirement for providing CWIC work, is there any restriction on what that individual can do ((inaudible)) in the other time helping people with their SSI or SSDI applications or things like that?

Carol Cohen: Okay. Hang on one second. Thank you for a very challenging question. We're going to have to get back to you on that. If you - let's see, did you submit that question?

(Richard Freidkin): No, I did not.

Carol Cohen: Would you please?

(Richard Freidkin): Sure.

Carol Cohen: Thank you so much.

(Richard Freidkin): You're welcome.

Operator: And we'll now go to our next question.

(Jen): Hi, it's Jen in Maine again. Sorry. I'm looking at the risk assessment and just curious as a non-profit part of a larger institution, are you looking to answers to the first question around the larger institution or our individual department?

Chris Brennan: Hi, this is Chris. Audrey, could you open up the risk assessment and answer that question? I don't have the copy of the risk assessment in front of me.

Audrey Adams: Sure, give me one second. I believe it's - Jen, let me ask you this, if - when you go to apply, are you applying as the primary organization or are you applying as a smaller department?

(Jen): We specify the department, but it's the larger organization's you know, tax ID number and DUNS and all that stuff.

Audrey Adams: Then my understanding is that - and correct me if I'm wrong, Chris, but it would be based on the organization that is completing the application.

Chris Brennan: Yes, that's my understanding also.

(Jen): Okie-dokie, thank you.

Operator: And we go to our next question.

(Alexis Henry): Hi, this is Alexis Henry again. I have three questions. One, can you just clarify the budget narrative is or is not included in the 75 pages?

Chris Brennan: Hi, this is Chris. No it's not included in the 75 page limitation.

(Alexis Henry): Okay, my second question, are you assuming that the new technical assistance and training provider will provide enough continuing education opportunities that CWICs can meet the 18 CEU requirements through the training in TA that would be provided by this new entity? I'm sort of doing a follow-up to the question about budgeting for continuing education training for

CWICs. Should we assume that will all be provided by the new vendor, or should we be budgeting some money for additional training because the new vendor won't cover it all?

Carol Cohen: That's a follow-up to an earlier question, which is a great question, and I'm going to - and there's two parts to it. The first part is do we - are we making the assumption that any new provider would have sufficient opportunities for you to meet your 18 hours. The answer is yes.

(Alexis Henry): Okay.

Carol Cohen: We are making that assumption. As far as earning any credits with any other provider, I would really appreciate it if you could submit that question.

(Alexis Henry): Okay, we can do that.

Carol Cohen: And then watch for the FAQs.

(Alexis Henry): Okay. And then my third question is a little bit of a follow-up to my earlier question about skyping, etcetera, etcetera. Will you be providing any additional guidance on what would constitute a secure environment as we may be using these you know, additional technological approaches to interacting with beneficiaries? You know, I mean, if we are skyping or you know, FaceTiming.

Carol Cohen: Yes, we absolutely will.

(Alexis Henry): Okay.

Carol Cohen: We will provide additional guidance, but we're going to back to your second question.

Female: All I want to add is just to remind anyone who is applying that there is a requirement that the organization take on the responsibility of getting state and local training. If you need to budget for travel, or if you need to budget to purchase manuals or other things, that's part of the essential budget.

(Alexis Henry): Right. Yes, right.

Carol Cohen: That's a really good point, and we're going to go back and look at whether any of that might count towards the 18. We'll - you submit that question, (Alexis), and we'll - we promise you an answer.

(Alexis Henry): Okay. Okay. Great, thanks a lot.

Operator: And we'll move to our next question.

(Donald Leger): Yes, my name is Donald Leger on the Louisiana project. Regarding the toll-free intake number that alleviates you getting involved in beneficiary calls, does it also pertain to if you already have an established, centralized intake where the CWICs are not involved in counting beneficiary calls?

Carol Cohen: Question, Terri? Okay. Go ahead.

(Terri): Okay, Donald, I think what you're - hi, this is Terri, and I think you're referring to the 800 number that you and the advocacy center have in the state of Louisiana to provide intake services.

(Donald Leger): Correct.

(Terri): And I think that those are questions that we're going to have to answer as the grants are awarded as far as what - if you want a secondary intake system. The - what the help line is going to do is provide - they - what they do now, information and referral, and referral directly to the WIPA via the secure database, so you may still need or want to have intake. You may still want to have another service, but you want to consider that. I think we need to consider that. We're not going to - I don't believe we would prohibit it. Yes. Does that answer your question?

(Donald Leger): I believe it does. I'm just wondering...

(Terri): I think what we're saying is you know, as this unfolds and if you're awarded again, you know, we'll work with you and help you make these decisions.

(Donald Leger): Thank you, I appreciate it.

Carol Cohen: Did you have another question?

(Donald Leger): No, that was it, thank you.

Carol Cohen: Okay, cool.

Operator: And we'll move to our next question.

(Kathy): Hi, this is Kathy from the ARC Michigan, and I have two questions for you. The first one has to do with the CEU issue, so it's always been the recommendation that the project director be a certified CWIC which I am both of those things, so I'm wondering - but I don't do a lot of direct service. So I'm wondering, you know, will I need to do the CEUs to keep up my CWIC status? Is that going to be recommended? Is it going to be special CEUs for directors?

(Crosstalk)

Carol Cohen: Another really great question, and you know, our inclination is to say yes, we'd like you to keep up. It's like any kind of licensing or any kind of certification where if you want to maintain it, you have to continue. But again would you please submit that question? That's a great question, like if you're certified, but you're not providing a lot of direct service, but are you providing any?

(Kathy): Well I have done some as the result of you know, getting certified, and then also I've you know, I am currently the CWIC for a small area of our overall current service area, although in the next iteration if we're awarded that will likely not be the case, so...

Carol Cohen: Your project officer is nodding her head and saying if you continue to provide CWIC type services, then yes, you should have those continuing education credits to stay on top of your field.

(Kathy): Okay. And then my next question is ((inaudible)).

Carol Cohen: I'm sorry, go ahead, yes.

(Kathy): I'm sorry. Is there a plan in place that Social Security has if the state does not get enough applicants for - with the project?

Carol Cohen: Yes, we do, and it's in the RFA that if we don't receive adequate or acceptable or fundable applications or any for that matter for a particular area, we will reannounce. We will come out again with another reannouncement, with another announcement.

(Kathy): Great, thank you so much. I appreciate...

Carol Cohen: Yes, for those areas that are not covered, we went through this before in 2006, some of you may remember, where we had to reannounce for the areas that we didn't get coverage.

(Kathy): Okay. Great, thank you so much. I appreciate it.

Carol Cohen: But that's actually in there, yes.

(Kathy): Okay. Thank you.

Carol Cohen: Good questions.

Operator: And we'll move to the next question. Please check your mute function. With no response we'll move to our next question.

Male: We already had our question answered, thanks.

Operator: And we'll move to our next question.

(Carmen): Hello, this is Carmen in Kansas. I have a couple of questions. Actually, I like the movement on the more use of technology and the BASS as the front line for information and referrals. I would just like to ask if the BASS is going to focus more on getting beneficiaries' emails and whether they have the ability to print. Oftentimes beneficiaries because of their income do not actually have a lot of data time available on their phones if they have them for smart phones, and then they oftentimes don't have the ability to print.

So I just wanted to ask if there would be any focus to work with the BASS on capturing that data, and then my second one was that there was on page 16 that basic duties of the CWICs would be to make sure that we focus on the Social Security ticket to work and path, so along with the fact

that so many of our beneficiaries don't have adequate access to technology, whether the path and using the path will be more open to getting certain types of technology instruments for beneficiaries.

And then thirdly there was also about accepting referrals from the BASS when most - at least part of the staff is part time, sometimes it's hard to reply or accept referrals within two business days where it had just been five days, and then also that priority would be given - or it would certainly encourage that projects have availability on evenings and weekends.

Is there going to be any kind of toll-free number for the - like a state Social Security, because the hours of operation for the field offices is increasingly getting shorter, although I did see that there - that some hours might be expanded, but sometimes meeting with beneficiaries, we need some pretty fast follow-up from Social Security. And sometimes it takes a while to get response back from offices from follow-up on BPQYs and problems with work CDRs because of the hours of operation. So those are my three areas. Thank you.

Carol Cohen: Okay. Okay, let's go to the first - let's go back to the first area.

(Carmen): Okay. That was the BASS focus on emails and ability to print.

Carol Cohen: Okay. Hang on one second.

(Carmen): Sure.

Carol Cohen: Okay. So the first question, let me just say there are probably many people on the phone that are not sure what you mean by the BASS.

(Carmen): Oh, sorry, the help line.

Carol Cohen: That's okay. We have an existing contract with Booz Allen Hamilton, and as part of their contact they run the national call center. Now I need to say that this is a really, really exciting year for us because in addition to a new WIPA, a cadre of new WIPAs, we will also have a competition coming up for the technical assistance and training for the WIPAs. In addition we also have a competition coming up sooner rather than later for a recompetition for the contract that will manage the call center.

So I can answer your question like this, currently we have no plans to make any changes to the procedures and processes that the call center uses to refer individual beneficiaries to the current WIPAs. We have no plans to do that under the existing contract. I cannot say much about any future contracts, but I can tell you there is a competition so we will have a new contractor and at that time there may be some changes to procedures and processes, so that's what I can say about that right now.

So you're - you had a bunch of questions in there. The third area you talked about the field office hours, and we cannot address that. That would be something operations would have to address. We just couldn't begin to address that for you. Now go back to the middle, what was your middle question? About the BPQY?

(Carmen): Right, since the focus is to use more technology for distance, which we've been doing that a long time, but you know, and also focusing more on the use of the paths, whether Social Security and the path cadres are going to be more open to focusing on maybe getting beneficiaries up to date with their technology and so that they can return to work or go to school or use technology to - with their jobs, because a lot of employers are now going with the pay stubs that are all online. And sometimes we have trouble or beneficiaries can't get their pay stubs because they don't have access to online and to printing.

Carol Cohen: Okay, okay, I understand what you're - I get what you're saying. There's lots of questions embedded in your question.

(Carmen): I know, sorry.

Carol Cohen: I have a few things to say and you - okay, you brought up some very good points and some frustrations that I'm sure many on the phone and many others share with you. Let me say this about the BPQY. We know and I think I said this earlier on the call, and all the folks here are nodding. We know that there are a lot of challenges in attaining the BPQY.

I promise you we are working diligently here at headquarters internally to improve procedures for you, more to come. Bear with me, I really am not being evasive, I promise you, but more to come. We are working on ways to improve your access to BPQYs because we know you need those. Did you want to comment about the PASS?

(Margery): Oh, I just wanted to comment, we had - in the RFA we mentioned all the different work incentives and the PASS is just one of them, but any kind of technology that you're talking about could definitely be included in a PASS application. It's all about how it helps the individual achieve their work goal. That's not a change in policy or anything else, so by all means put that stuff in a PASS application. And the pass specialist can look at that, and you know, as long as we...

(Crosstalk)

(Margery): ...ways that we could word our - or possibly put into this new grant application our focus on getting either state employment networks to get more educated on the PASS and be able to use it and how we can, you know, with this new competitive opportunity to express how we're going to use technology more, but we also have to make sure that beneficiaries have access that technology also.

Carol Cohen: You make a very, very good point. I know there have been many discussions internally about creating a beneficiary Website so folks could obtain their own information. This again is beyond us. It's not something we can respond to. That would be something that speed - that is under consideration by another division here and that's the systems folks, and I know this has been talked about, whether there could be a universal Web-based access for beneficiaries to - really to do anything that they needed to do with their own accounts including pull down a BPQY.

This has been ((inaudible)) - yes, it's been discussed, it's been written about and so forth. I don't know where that is. That would be something that systems would be addressing, but you raised some terrific points.

(Carmen): Okay. Thank you very much for your time.

Carol Cohen: Thank you.

Operator: We have one final question in queue. We'll go to that question now.

Carol Cohen: Hey, perfect timing. Okay.

(Terri ND): Hey, everybody, it's Terri in North Dakota.

Carol Cohen: Hi, Terri in North Dakota.

(Terri ND): I know. I didn't know we're being recorded, so hi, everybody into the future. Now what we have here and a just quick clarification is we have a - we also - our non-profit was also awarded monies from VR to have an extra CWIC in the state, and that position then shares project coordinators with the WIPA project coordinator, does that make sense?

I just want to make sure we have everything in line for this firewall thing, and back to the previous question about VR, whether they're coming in as an EN and this firewall thing, are we going to have some issues with that, or not, I guess?

(Terri Uttermohlen): ((inaudible)). Terri, if I understand your question correctly, you're saying that you have a benefits specialist that works for you that is partially funded by VR fee for service. Is that correct?

(Terri ND): Not fee for service.

(Terri Uttermohlen): By VR, VR has given - giving your agency money for that staff person to provide services to VR clients.

(Terri ND): Also incorrect.

(Terri Uttermohlen): Okay.

(Terri ND): They're not limited to just VR clients.

(Terri Uttermohlen): Two times.

(Terri ND): Yes, but yes, they - I mean, we report as to what percentage their time...

(Terri Uttermohlen): Oh, so if they're just - they're providing benefits counseling to people in the state, and VR is saying, hey we're going to fund part of this position.

(Terri ND): VR recognized the importance of the WIPA program, their benefits to their beneficiaries in North Dakota and their clients and they gave us some money.

(Crosstalk)

(Terri Uttermohlen): They gave the organization some money, but that person is not a VR employee.

(Terri ND): Correct, that's right.

(Terri Uttermohlen): So there's no firewall issue.

(Terri ND): Beautiful, thank you for the clarification.

(Terri Uttermohlen): You're welcome.

(Terri ND): Also one real quick one if I can, are there - I know that we set benchmarks for all WIPA projects. Is there any wiggle room let's say for modifications or at least some leeway? Some of you are extremely rural, and I - this goes back a little bit to the outreach thing, and like it was touched on before like how some trips can take an all day. We make it as efficient as we can, but man, it's just wildly different for some of us and in some of these states. But I guess that was more of a comment than a question.

(Terri Uttermohlen): Okay, I might be off base here, but we made a comment that we may be modifying some of these benchmarks. You'll receive further guidance. You know, a lot of these questions are kind of you know, the types of questions that we sort of a wait and see and let's see what we get when we make all the final awards, you know, and we have all these new contractors on board.

I mean, this is going to be - it's kind of like August, September, October's going to be like our opening act, you know? We're going to be rebooting this entire process, so I think we're going to definitely take some of these comments and some of your comments under advisement. Djuna, what?

(Djuna Mitchell): No, I was suggesting that he submit the question just so we can make sure that we address it at a later point when we have more information.

(Terri Uttermohlen): Right, right. And I'm going to reiterate what Djuna Mitchell just said, that - because we're about ready to close here. First of all, this was - I don't know about all of you, but I can say for us here we thought this was incredibly informative and productive, very helpful, and you came up with some fantastic questions. We really thought, oh, we have all the questions here. We can't think of any more. Well you thought of about 100 more.

So if you are not satisfied with the answer you received or the question you asked is not posted, then give it a few days, because we're going to post an updated FAQ. Please submit your questions, please, because that's the way we can talk about them and address them and who knows? We might, you know, change something. I mean, you just never know.

You know, there's - things come up every day that we haven't thought about and you've probably thought about things that we haven't. So please submit those questions so we can deal with them. We thank you all so much for your participation and again marvelous questions. You've obviously put a lot of thought into it. We hope you're as excited as we are about number one, having the opportunity to do this after so many years, and opening up the field so that we see some other entities out there and what they've been doing.

And we're just - we're really enthusiastic about it. It sounds to me as if you are also. Hopefully you like some of the changes we made, but please give us our feedback. Don't ever hesitate to call

your project officer if you're an existing WIPA, and go to that Website frequently, and what else did I leave out? This will be - this is recorded. We're going to do it again on the 12th. You're welcome to join us again on the 12th of March. We will have an open FAQ session again. Some probably new questions will be raised. What did I leave out? OAG, any comments?

Chris Brennan: Again, we appreciate all your input and keep referring back to frequently asked questions and answers.

Carol Cohen: And I guess with that, unless anyone - do you have anything, anyone here? Terri, Margery, Cheryl, no? Okay. Thank you all again. Enjoy the rest of your day and we look forward to an exciting summer, that's for sure, so thanks again, and operator, I think we have post-conference, yes.

Operator: Yes, this concludes our conference. Thank you for your participation.

(Crosstalk)

END